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Comparative Empirical Analysis of the OECD Countries: Freedom, Equality and Sustainable Development in the OECD Countries (2002–2016)

In our first round of comparative empirical analysis, we focus on the OECD countries (OECD35), with more specific data breakdowns for the USA, the European Union (EU15 and EU28), the Nordic Countries and Japan. We will have a closer look at all the indicators and dimensions across the period of 2002–2016. See also Figs. 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9, 3.10, and 3.11 and the tables in Appendix A.1 and A.2.

1. *The dimension of freedom for the OECD countries*

- 1.1. *Political freedom in the OECD countries*: The Nordic countries position themselves here at the very top, almost (more or less) realizing and representing the empirical maximum of 100 (see Fig. 3.1). The Nordic countries lie also clearly ahead of all the other predefined OECD country groups, including the USA. The USA, EU15, EU28 and Japan, they all place in a middle field, and above the (mean-based) average of the OECD. When looking at the trends from 2002 to 2016, there appear to be two phenomena at work: either a ceiling effect or even a modest

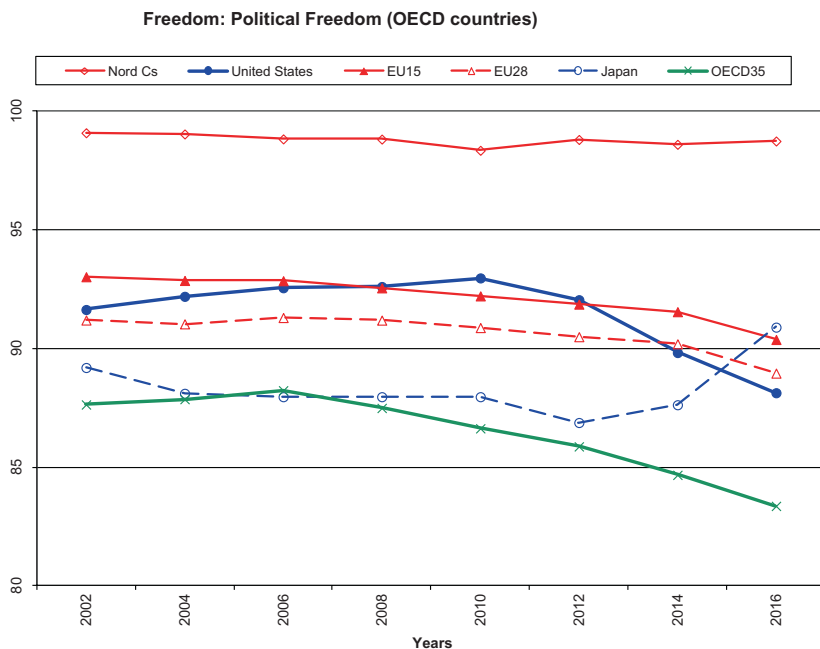


Fig. 3.1 Political freedom in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author’s own calculation and visualization)

downsliding of or for political freedom. So why is there no more growth of political freedom? On the one hand, this may reflect a conceptual and methodic problem of the used indicators, allowing no more substantial gains and thus putting the used indicators at challenge. On the other hand, there may be more of a need and demand for rethinking and reconceptualizing what new dimensions (manifestations) of freedom can be or even have to be, well suited and adequate for the following course of the twenty-first century.

- 1.2. *Economic freedom in the OECD countries:* Patterns and trends here (see Fig. 3.2) somewhat deviate from the picture in reference to political freedom. Concerning economic freedom,

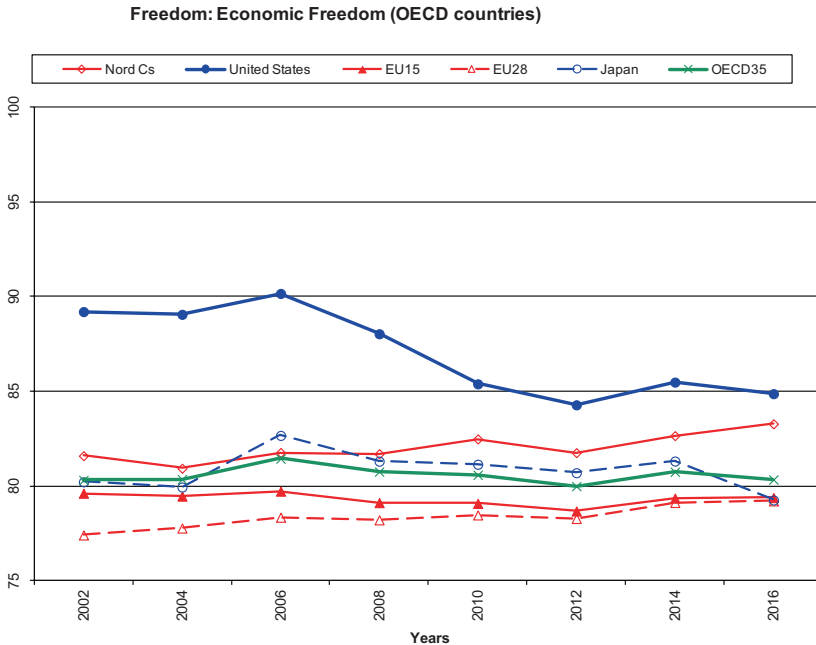


Fig. 3.2 Economic freedom in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

clearly the USA ranks first. Second are the Nordic countries, while Japan and the EU15 and EU28 member countries are oscillating around the OECD average. Particularly, during the first half of the 2000s, there has been a general increase in economic freedom, which, however, leveled off during the second half of the 2000s and later on. Economic freedom in the USA declined after 2006 and slightly increased or stayed stable in the other OECD country groups, this implicating a closer coming together in the whole OECD context.

2. The dimension of equality for the OECD countries

2.1. *Income equality in the OECD countries:* The Nordic countries clearly rank here first, with a certain downsliding of income

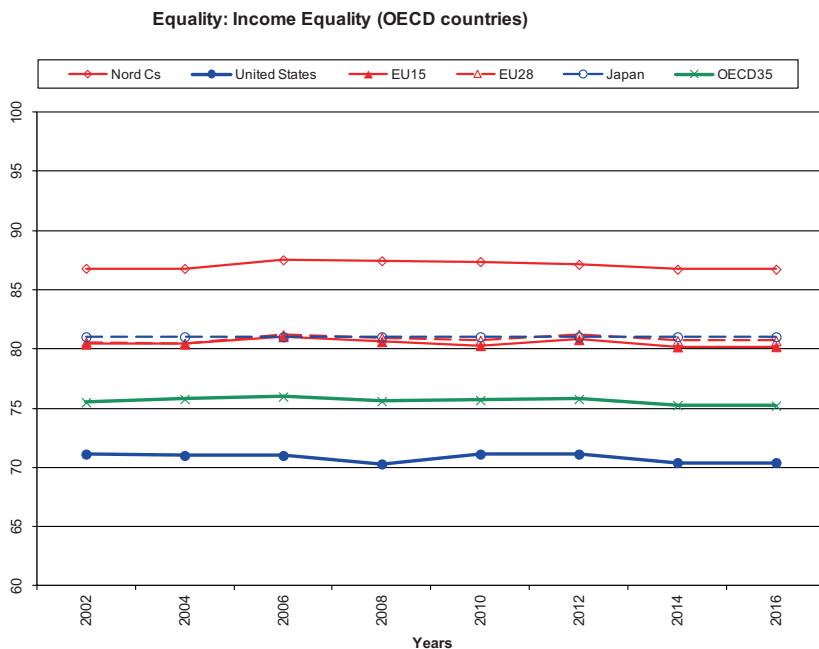


Fig. 3.3 Income equality in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

equality after 2010, however, not questioning their comparative number one status (see Fig. 3.3). Japan, the EU15 and EU27, they lie closely together. The USA, on the contrary, places obviously and clearly below OECD average. The lead of the USA in economic freedom is being sharply contrasted by this considerably behind positioning in income equality. In OECD context, the Nordic countries and the USA represent here the two opposing poles concerning differing and deviating degrees of income equality. As a general rule, it can be said that income equality has come under further pressure after 2010, particularly in the USA, the Nordic countries and OECD average. So, income equality should mark and indicate a considerable concern.

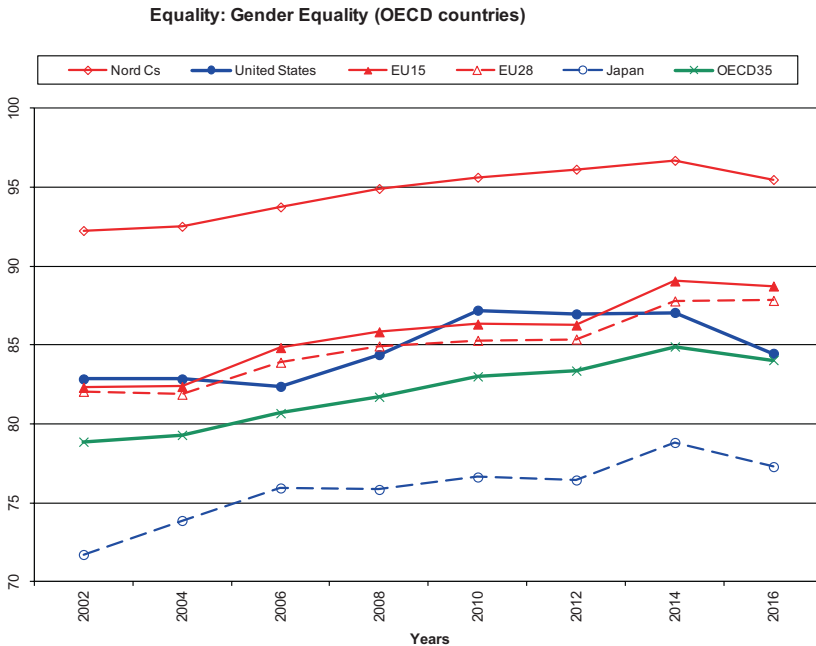


Fig. 3.4 Gender Equality in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

2.2. *Gender equality in the OECD countries:* Concerning gender equality, the Nordic countries (again, as in the case of income equality) are leading far ahead of the other OECD countries (see Fig. 3.4). In the middle field place the European Union (EU15 and EU28) and the USA. There has been a certain and positive shift in ranking positions during the 2000s. In the early 2000s, the USA was slightly leading ahead of the EU, but, in the later 2010s, this ranking shifted in favor of the European Union and to the disadvantage of the USA. EU15, EU28 and the USA place with regard to gender equality higher than the OECD average. Concerning the countries and country groups here covered, Japan ranks the last, and below OECD average.

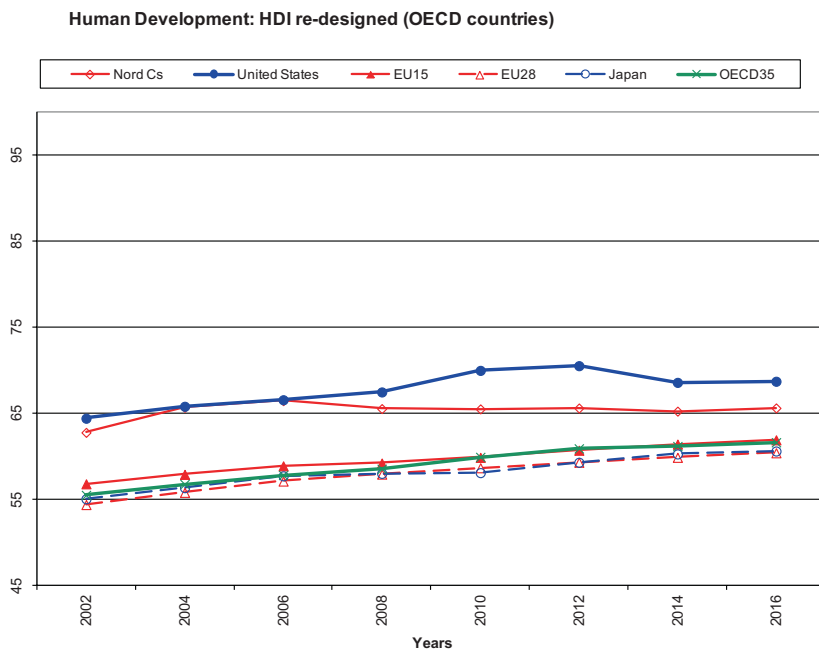


Fig. 3.5 Human development (HDI re-designed) in the OECD and OECD countries (2002–2016): Nordic countries, US, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

While Japan is performing better with income equality (above OECD average), it performs less good on gender equality. With the USA, the relationship is opposite: an above average performance on gender equality, but obviously clearly below OECD average regarding income equality. In both equality dimensions, the European Union (EU15 and EU28) is ranking higher than the OECD average. The lead of the Nordic countries in gender equality is more distinct than with income equality. For the OECD countries and country groups, gender equality gradually increased (at least in relative terms) over the 2000s and 2010s, while income equality has come under pressure, with a certain tendency of decline and further declining. However, as a

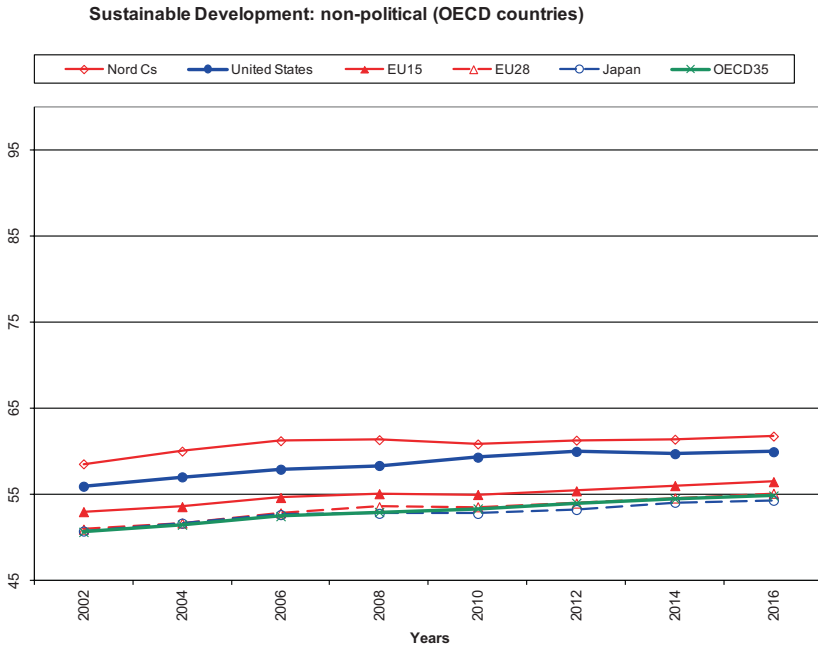


Fig. 3.6 Sustainable development (non-political) in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

general trend, gender equality also has declined (again) in the OECD and all (most) identified OECD country groups after 2014. Either this marks a short-term fluctuation or the beginning of a serious new trend that must be very carefully and closely observed in the coming time.

3. The dimension of sustainable development for the OECD countries

3.1. *Human Development Index redesigned*: In the context of this work here, we (partially) redesigned the Human Development Index, interested in preserving the character of the Human Development Index (HDI), but applying indicators that can be more easily accessed (via the World Development Indicators, World Bank 2018). We were interested in using indicators

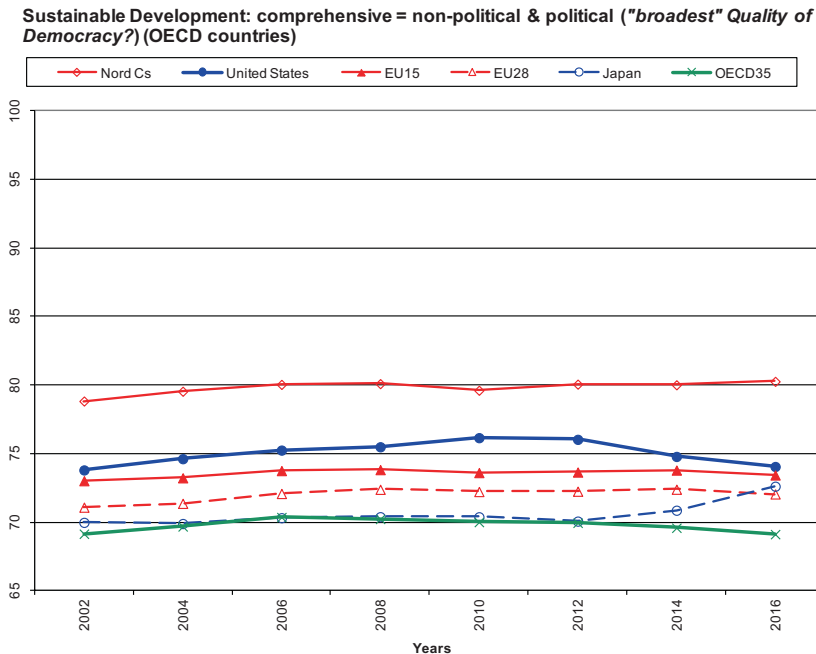


Fig. 3.7 Sustainable development (non-political and political) in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

with a good empirical coverage for the time window of 2002–2016, displaying not too many data missings. To recapitulate, the redesigned HDI averages (means): life expectancy at birth (in total years), school enrollment tertiary (% gross) and GDP per capita in PPP¹ (constant 2011 international \$). In context of the OECD countries, the USA and the Nordic countries score first on the redesigned HDI (see Fig. 3.5). The EU member countries (EU15 and EU28) and Japan are grouping around the OECD average (OECD35). Throughout the whole period 2002–2016, there is a steady increase in scores

¹PPP stands for: Purchasing Power Parity.

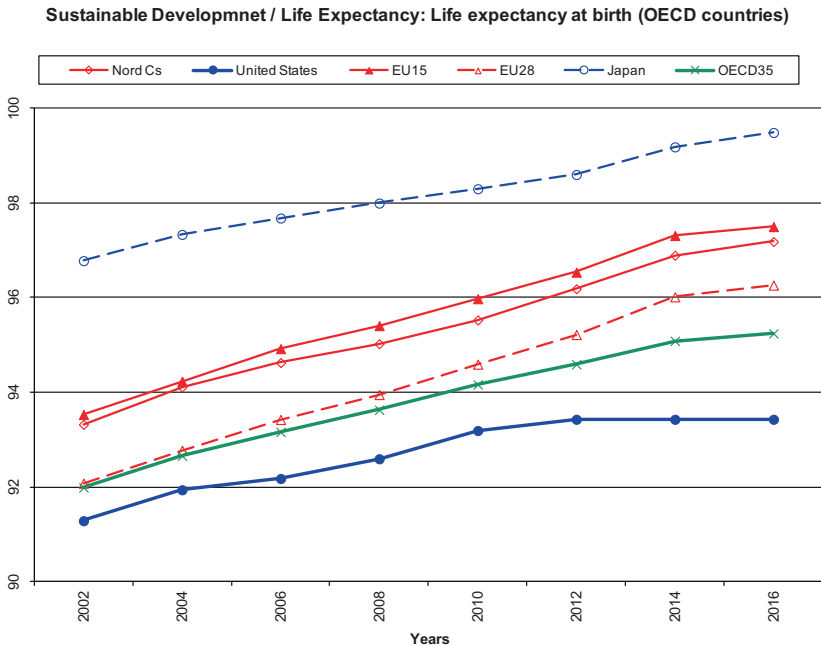


Fig. 3.8 Life expectancy (sustainable development) in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28 and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

for all the here-mentioned countries and country groups, while this increase again has (slightly) decreased for the USA and the Nordic countries after 2010. When comparing the redesigned HDI with the original HDI of the UNDP (United Nations Development Program), there are some similarities, but also some marked differences. *This suggests that we can recommend and set up for discussion the proposition that it matters, which indicators are being taken specifically for defining, constructing and building indices and dimensions. Indicators matter.* Indicators can impose effects, and different indicators may impose different effects. This refers back to the starting point, which indicators should be taken? *Designing and building a pluralism of competing indices (dimensions) for purposes of simultaneous analysis may*

"Sustainable Development" / Tertiary education: School enrollment, tertiary (% gross) (OECD countries)

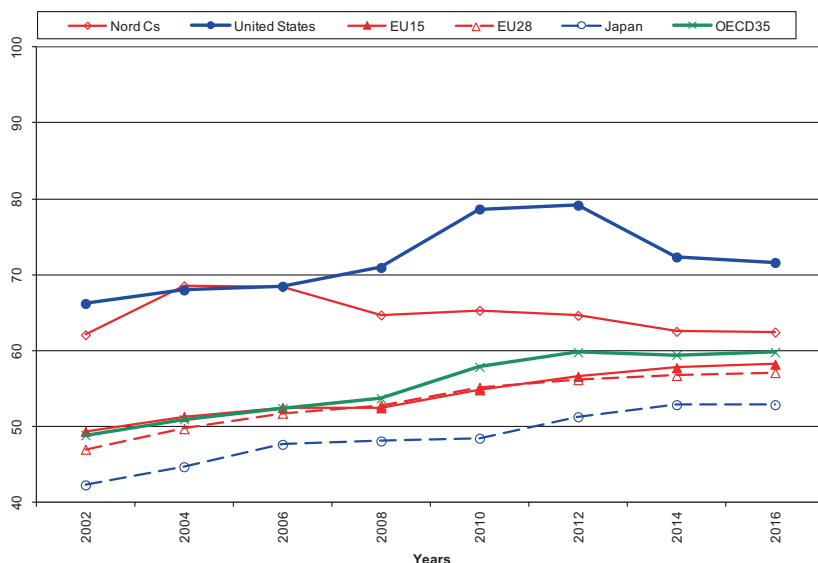


Fig. 3.9 Tertiary education ("SUSTAINABLE DEVELOPMENT") in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28, and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

represent one approach for generating a more balanced picture and overview on status, patterns, clusters and trends. Every approach of a non-pluralistic drafting of indices runs the risk of encouraging the production of biased interpretations.

- 3.2. *Sustainable Development non-political:* The non-political sustainable development, in context of the conceptual framework for analysis being presented here, averages (means) the following indicators (with specific weight measures being attached): life expectancy at birth (total years), school enrollment tertiary (% gross), Gini Index (issued by the World Bank), Global Gender Gap Index (issued by the World Economic Forum), lower CO₂ emission (metric tons per capita) and GDP per capita in PPP (constant 2011 international \$). Therefore, the non-political

Sustainable Development / GDP per capita: GDP per capita, PPP (constant 2011 international \$) (OECD countries)

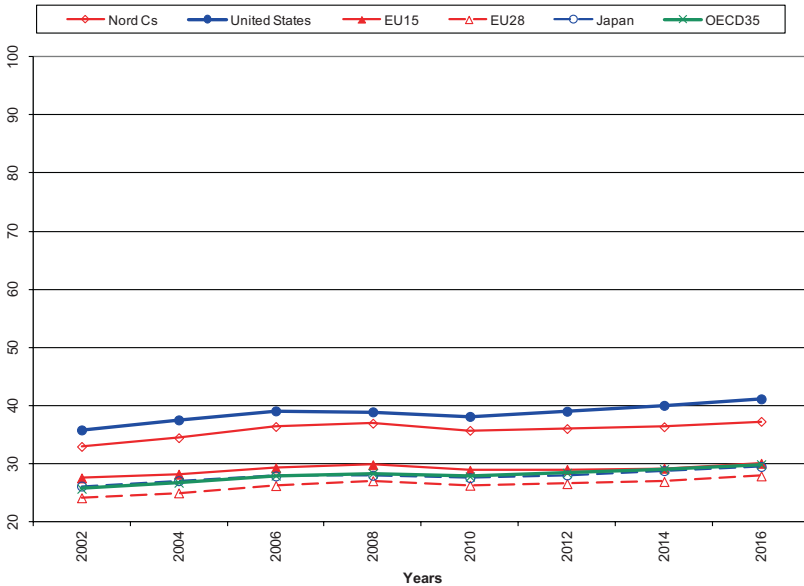


Fig. 3.10 GDP per capita (SUSTAINABLE DEVELOPMENT) in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28, and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

sustainable development clearly represents a broader indicator basket than the redesigned HDI. In reference to this non-political sustainable development, the Nordic countries demonstrate the outright lead, being followed closely by the USA (see Fig. 3.6). The EU15, EU28 and Japan group together very closely around the OECD average. The scores for non-political sustainable development also show a steady increase over the years 2002–2016, however, also a certain ceiling effect for the Nordic countries and the USA after 2010. When results of non-political sustainable development are being compared with the redesigned HDI, then the propositions are: First of all, the overall lead of the Nordic countries is now clearer and more distinguished. Furthermore, the lead of the USA over the EU and

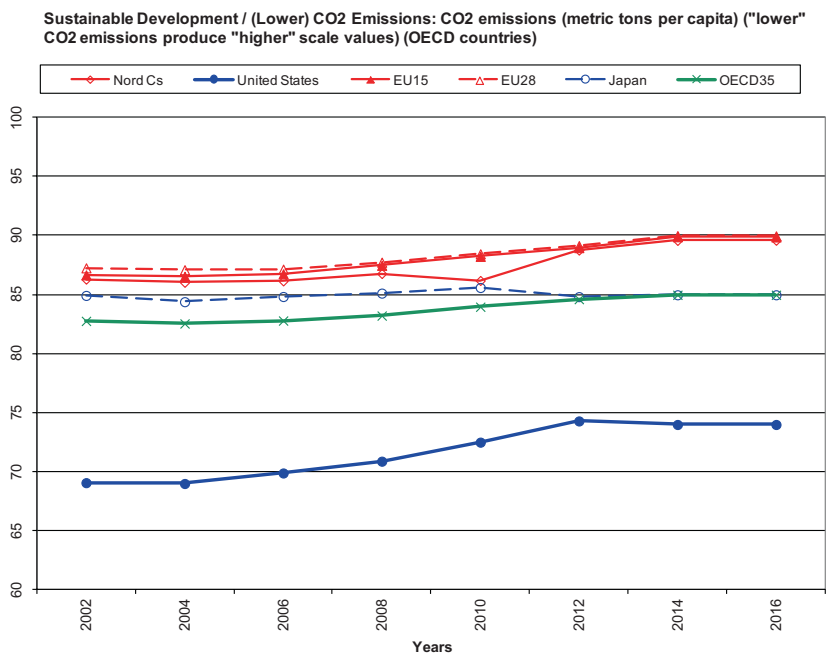


Fig. 3.11 (Lower) CO₂ emissions (SUSTAINABLE DEVELOPMENT) in the OECD and OECD countries (2002–2016): Nordic countries, USA, EU15, EU28, and Japan. Scale range 0–100: 0=(theoretical) minimum, 100=empirical maximum (Source Author's own calculation and visualization)

Japan narrows down more considerably. *Thus it appears that the more indicator-narrow definition of the redesigned HDI favors the USA, while the indicator-broader setup of the non-political sustainable development is more often at the favor of European democracies. Gender, income equality and lower CO₂ emissions play (when combined and aggregated) apparently for the advantage of Europe (on several occasions).* Differences in scores and rankings between the non-political sustainable development and the UNDP's Human Development Index (e.g., UNDP 2009, 2010) are even more pronounced than in the case of comparing the UNDP's HDI and the redesigned HDI (here). *This reemphasizes the earlier proposition that the specific indicator coverage of indices does matter and has effects for rankings over countries and time.*

- 3.3. *Sustainable Development comprehensive (a “broad” conceptualization of Quality of Democracy)*: Sustainable development, in comprehensive terms, averages (means) (1) non-political sustainable development² and (2) political freedom. “*Comprehensive sustainable development*,” as is being defined and presented here, represents, therefore, a type of a conceptually “broad” definition of democracy and quality of democracy. To turn this argument: Is there an interest in measuring the quality of democracy, this then could be approached in an indicator-based way by applying a conceptual formula as we do it for “Comprehensive sustainable development.” *Conceptually, such a broadly defined concept of quality of democracy, conceptually and theoretically in line with (a broadly defined) sustainable development, represents (again in conceptual and theoretical terms) an opposite pole to a narrowly defined electoral or liberal democracy.* In metaphorical terms, lending spatial categories from language (in language): *the conceptual and theoretical space of democracy has on the one side the vertex (corner point) of a narrowly defined liberal democracy, and on the other side the vertex (corner point) of a broadly defined high-quality democracy that is based on sustainable democracy.* This may also indicate separating lines in values and ideology. Of course, out of reasons of fairness, we should add that sustainable development could be defined in a fashion differently than we did this here, by using other indicators or by weighting indicators alternatively with other weights. Looking at the empirical results of “Comprehensive sustainable development,” the Nordic countries are clearly leading and rank impressively first (see Fig. 3.7). The USA, the EU15 and EU28 and Japan cluster together very closely, also with a diminishing and evaporating gap over time, almost converting together into an area of overlap. The Nordic countries, the USA, EU15 and

²Non-political sustainable development averages (means) the following indicators with specific weights (see also above): life expectancy at birth (total years), school enrollment tertiary (% gross), Gini Index (issued by the World Bank), Global Gender Gap Index (issued by the World Economic Forum), lower CO₂ emission (metric tons per capita), and GDP per capita in PPP (constant 2011 international \$).

EU28 and Japan, they all place higher and above the OECD average. *It is interesting and should be emphasized that the USA and EU15 score balanced and in an equilibrium, resulting almost in a stalemate, when we refer to “Comprehensive sustainable development” and define sustainable development the way we did it. Despite clear indicator-specific differences between the USA and EU15, when aggregated, these differences score up in a counterbalanced comprehensive measure.* This opens up the room and unlocks the opportunity of developing contradictory propositions and expressing conflicting views. Could this even lead to an ideological deadlock? Or does this also imply that our concepts for understanding democracy, society and economy and their interwoven dynamics are still underdeveloped and too partial, and we still lack a sufficient meta-perspective? While the EU15 scores (almost at par) with the USA, the USA still leads slightly ahead of the EU28, concerning “Comprehensive sustainable development.” This refers to the already earlier raised question, whether EU15 or EU28 should be regarded as the better or fairer peer for purposes of comparison with the USA. Focusing on EU28, it then could be demonstrated on the basis of empirical measurement that the USA leads ahead of Europe concerning the quality of democracy and “Comprehensive sustainable development.” *When, however, taking the EU15, we may assert an equilibrium (or ideological deadlock) between the USA and Europe (European Union) in reference to quality of democracy and “Comprehensive sustainable development.”* When looking more specifically at the individual European (EU) countries (and referring to 2016 as the mattering benchmark year), then (in terms of such a broadly defined quality-of-democracy concept) ten European and (out of this) eight EU member countries outpace the USA.³ Thinking a step further, of course, we

³Those European countries, ranking on quality of democracy higher than the USA in 2016, are in the order of sequence (see Table A.2.7 in Appendix 2): Norway, Ireland, Sweden, Switzerland, Netherlands, Denmark, Finland, Belgium, Germany, and Austria. Non-European countries, ranking higher than the USA (again in 2016), are: Australia, Canada and New Zealand.

could ask, what would happen, should we disaggregate the USA into the 50 US member states, and compare these then with the 15 or 28 member states (member countries) of the EU? Perhaps an interesting matrix would result. The EU member states (and the US states) also can be disaggregated into subnational regions. This indicates routes for further interesting analysis and future research questions. In the context of the empirical analysis here, we decided to focus our model and conceptual framework of analysis to democracies (and non-democracies) at the level of countries (nation states). *Despite this deadlock of ideology and performance between the USA and EU15, however, the Nordic countries clearly lead ahead of the USA as well as the EU15 (also EU28 and Japan), regarding a broadly defined quality of democracy, and based on "Comprehensive sustainable development."* This Nordic lead (and widening gap in favor of the Nordic countries) is the result of empirical measurement (following a specific conceptualization of democracy and sustainable development), and not of ideological assertions. *Should ideological positions be deadlocked between a favorable (ideological) view to the advantage of the USA or to the advantage of the European Union (USA versus EU), then this Nordic performance enables additionality by bringing in a new perspective, something close to a meta-perspective above the USA and EU.* The Nordic countries introduce a crucial reference point for meaningful analysis and empirically-based comparison. Should this encourage more of an intelligent and of a sensitively comparative benchmarking of the USA and EU with the Nordic countries? What can the USA, but also the EU, the OECD countries in general and the world learn from the Nordic countries (and what can the Nordic countries learn from the world)? In terms of quality of democracy and based on "Comprehensive sustainable development," Japan is behind the Nordic countries, slightly behind the USA and EU15, but performs still better than the EU28 (as of 2016) and OECD average (whole period). What are differences in empirical effects between "Comprehensive sustainable development" (Fig. 3.7) and non-political sustainable development

(Fig. 3.6). “Comprehensive sustainable development” appears to have a favoring effect for European democracies, and puts the USA under pressure. The introduction of political freedom plays to the advantage of Europe and the EU, not to the advantage of the USA (in recent years). This tendency is also consistent when we look back at the redesigned Human Development Index, which does not incorporate political freedom and is even more narrowly indicator-defined than the non-political sustainable development (Fig. 3.5): concerning redesigned HDI, here the USA is leading over the Nordic countries, the EU and Japan. For Japan, it can be stated that Japan is having a profile that is similar to (with) the EU across all three indicator sets: “Comprehensive sustainable development” including political freedom, sustainable development excluding political freedom, and the HDI redesigned. Therefore, Japan is not a contrast-profile against Europe or the USA, but aligns more closely with Europe (EU).⁴ This may be interpreted as a surprising result. *Therefore, as a general proposition, we may put forward: concepts of a broadly defined quality-of-democracy, based on “Comprehensive sustainable development,” play by tendency more in favor of European democracies and the EU, not so much in favor of the USA. Japan, surprisingly, has a profile that is quite similar to Europe and to the EU (in the context of the conceptual framework being applied here). The theoretical point of departure for conceptualizing democracy and the quality of democracy and their measurement, does matter and does impose deviating effects, when conceptual references are being drawn differently.* This always should be kept in mind and can be traced by empirical measurement. An ongoing reflection of the conceptual characteristics is therefore always necessary.

⁴In an earlier analysis, referring only to the years 2002–2008 and where tertiary education was compensated by the indicator of internet users (per 100 people), the performance profile of Japan behaved differently. Concerning the redesigned HDI, Japan scored (behind the leading USA and Nordic countries) better than the EU (EU15 and EU17). However, concerning the broader defined “Comprehensive sustainable development” or the sustainable development without political freedom, Japan scored in balance with the EU (but again behind the Nordic countries and the USA) (Campbell 2013).

4. *The specific non-political indicators of sustainable development for the OECD countries*: In the following, we shortly discuss and review those non-political indicators that we used for aggregating a dimension of sustainable development.⁵ In combination, these non-political indicators define in context of our *comparative multi-dimensional index-building* the non-political sustainable development. When political freedom is being added to the non-political indicators, then “Comprehensive sustainable development” results (within the framework of our model).

4.1. *Life expectancy at birth in total years (non-political indicator of sustainable development)*: Here, Japan clearly leads and ranks first (see Fig. 3.8). EU15 and the Nordic countries cluster together in close proximity, however, always EU15 ranks second and the Nordic countries rank third. Then follows EU28, still above the OECD average. Finally, the USA rank below OECD average. Life expectancy (per capita) cannot fluctuate as much as GDP per capita. Insofar, life expectancy contains most likely more information about the actual distribution within a population or society, so that the mean life expectancy may be closer to the median life expectancy than the mean GDP per capita to the “median” GDP per capita.⁶ Life expectancy resembles perhaps some patterns of similarity to income equality (compare Figs. 3.8 and 3.3). *The above OECD average of life expectancy in Europe and Japan correlates positively with the above OECD average of income equality again in Europe and Japan. In both regards, life expectancy and income equality, the*

⁵Income equality or Gini Index (issued by the World Bank) and gender equality, based on the Global Gender Gap Index of the World Economic Forum, we discussed already earlier (see Figs. 3.3 and 3.4). Therefore, we will not repeat (here) the discussion of these non-political indicators of sustainable development.

⁶The median implies that half of the population or of a sampled score higher than the median, whereas the other half scores lower. So the median really places in the middle of a distribution. For a more formal definition of the median, see on Wikipedia: <http://en.wikipedia.org/wiki/Median>; for a definition of the mean (arithmetic mean), see again on Wikipedia: <http://en.wikipedia.org/wiki/Mean>.

USA places under (below) the OECD average. Life expectancy carries implicit and explicit information about the distribution of wealth (and the quality of life and living) in a society, and will also, at least in some cases, indicate access and access opportunities of the population, the average individual, and the voter (voters) to welfare regimes and health care systems (see also Wilkinson and Pickett 2010). Interestingly, life expectancy is in EU15 (slightly) higher than in the Nordic countries, even though the Nordic countries achieve a higher GDP per capita and more income equality than EU15. As a general trend, life expectancy has increased for the identified OECD country groups over the whole period 2002–2016. However, in recent years, this increase again has slowed down.

- 4.2. *Tertiary education, tertiary gross⁷ school enrollment (non-political indicator of sustainable development):* Tertiary education clearly represents an indicator for sustainable development. Even though we review and discuss here tertiary education, we look at tertiary education also as a separate or distinct indicator that (in combination with other indicators) *can be interpreted also to represent a dimension that we may want to conceptualize as a “dimension of knowledge” (knowledge dimension).* This also interplays with the concept of “knowledge democracy” (Carayannis and Campbell 2012, pp. 16, 19, 52, 55; Veld 2010a, b; Biegelbauer 2013). Concerning tertiary education, the USA and the Nordic countries cluster together very closely; however, the USA ranks first and the Nordic countries rank second (after 2006) (see Fig. 3.9). EU15 and EU28 rank

⁷“Net” would indicate here that only the percentage enrollment of specific (predefined) age cohorts would be indicated. Since, however, tertiary education is not necessarily limited to specific age cohorts, this indicator is only being reported as “gross” in context of the World Development Indicators (World Bank 2011). In fact, the idea and concept of lifelong learning (LLL) emphasizes that there is a need or at least potential of spreading forms of tertiary education along the whole life spectrum, thus addressing very different age cohorts. Here, tertiary education and lifelong learning overlap with academic or tertiary continuing education. These appear to be trends for the advanced economies and societies, but could also apply to emerging economies.

third and fourth, close at, but still continuously slightly under the OECD average. During the 2010s, the EU15 is only marginally, almost negligibly ahead of EU28. Japan ranks fifth and is clearly under OECD average. In reference to tertiary education, we can conclude that the USA and the Nordic countries are leading definitely in advance of the OECD average. The Nordic countries and the USA occupy here a very strong (and potentially competitive) position. The European Union (EU15 and EU28) performs slightly below this benchmark of OECD average. Furthermore, and certainly, the EU definitely does not perform in advance of the OECD average. *Therefore, concerning knowledge and the knowledge dimension (when being identified as is here the case), there continues to exist a gap and cleavage to the advantage of the USA and to the disadvantage of the European Union. In context of the knowledge-based society and economy, or the knowledge society, knowledge economy and knowledge democracy, which underscore the importance of knowledge for development, performance and progress, this should be seen and identified as a weakness of the European Union and of European democracy vis-à-vis the USA* (Carayannis and Campbell 2011; Dubina et al. 2012). These propositions may also apply to knowledge democracy (Carayannis and Campbell 2011, p. 367). *The USA has more opportunities of leveraging knowledge than Europe. Therefore, the European Union should focus increasingly on efforts to promote more (and better) knowledge.* In their knowledge lead, the USA and the Nordic countries are apparently at par. *But this also implies that within context of the knowledge dimension (unlike several other dimensions) the Nordic countries are not leading or performing ahead of the USA.* Here the USA (as a major country) approached clearly (and also surpassed) Nordic levels. Concerning tertiary education, Japan falls behind the EU. One may want to speculate, whether the indicator of tertiary education may be even more important in reference to a comparative multidimensional index-building, because of the several ramifications of (tertiary) education for democracy and the quality of democracy, by perhaps providing more of a crucial

relevance than other knowledge indicators, such as technology diffusion (e.g., frequency of internet use). However, at least within the world of OECD countries, growth of tertiary education behaves also more saturated and changes in ranking positions are only difficult to achieve.⁸ Growth in technology diffusion (internet use) still is more dynamic, and shifts and improvements in positions and positioning can be achieved more easily by different countries. This current dynamism and dynamics of technology diffusion explain why growths in internet use may contribute so importantly to the dimension of knowledge. What are the current and potential future benefits of technology diffusion (internet use) for the by tendency “saturated” OECD growth in tertiary education? While tertiary education still has expanded in the EU and Japan during most phases in the 2000s and 2010s, these growth curves in tertiary education have saturated, even declined in the USA and Nordic countries in recent years. What does this tell us about further growth trajectories of knowledge economy, knowledge society and knowledge democracy?

- 4.3. *GDP per capita, PPP, in constant 2011 international \$ (non-political indicator of sustainable development)*: Concerning this indicator, the USA performs clearly as first-ranking (see Fig. 3.10). Second, perform already the Nordic countries. Almost at par perform the EU15 and Japan. EU15 and Japan place around OECD average, and EU28 performs slightly under the OECD average. *GDP per capita marks clearly an area of great strength for the USA*. In methodic terms, GDP per capita is more a mean value (a value of the arithmetic mean), and not a median score. Therefore, the GDP per capita does not indicate what are the patterns of distribution of wealth within a country (democracy or non-democracy). High GDP per capita does not automatically imply that the average citizen is well off and

⁸Scores for the Nordic countries even peaked in the mid-2000s. Scores for the USA peaked in the early 2010s.

prospering. *The USA ranks top regarding GDP per capita. This, however, is being counterbalanced by an income equality-ranking far below OECD average (compare Figs. 3.10 and 3.3).* The Nordic countries rank second (and still above OECD average) concerning GDP per capita, but are top in relation to income equality (far higher than the OECD average). *Therefore, when we compare GDP-per-capita-based, the Nordic countries and the USA are interested in the actual distribution of wealth across society (and the economy), where is the average citizen, again in terms of wealth, better off? Is the “median” GDP per capita higher in the USA or in the Nordic countries? The one big data problem, with which we are confronted, is the circumstance that the median GDP per capita is not being reported (systematically and comprehensively) in context of standard data compendiums or databases (such as the World Development Indicators, issued regularly by the World Bank; see for example World Bank 2018). Life expectancy (Fig. 3.8) has some distributional information (at least more than in the case of the GDP-per-capita-indicator), and here the USA performs below OECD average. All of this really indicates the serious need of starting to calculate and to report a median GDP per capita as a crucial and new indicator (or starting to design such an indicator).*

- 4.4. *Less CO₂ emissions, in metric tons per capita (non-political indicator of sustainable development):* This indicator we designed (redesigned) in a way so that higher (indicator) scores actually indicate less (lower) CO₂ emissions. Therefore, higher ranking positions are in line with less CO₂ emissions. With this indicator reference of CO₂ emissions, we want to include environmental sensitivity (Carayannis and Campbell 2010) and social ecology (Fischer-Kowalski and Haberl 2007) into the model-building, conceptualization and measurement of democracy and the quality of democracy. In that understanding, the social (societal) context of the political system matters, but is also the environmental context of society and of the political system of importance. In the model of Quintuple Helix innovation systems, the environmental challenge is being seen

and interpreted as a potential driver for further knowledge production and innovation (Carayannis and Campbell 2010, pp. 58–63). Could a democracy be regarded as a high-quality democracy that is ignorant of the environmental embeddedness of society, politics and the economy? Environmental pollutions obviously put at risk the further prospering or even the survival of a society, a democracy as well as an economy. The United Nations' Human Development Report of 2007/2008 also focused on the topic of "fighting climate change," thus highlighting and emphasizing the importance of ecological issues and features for the further development and progress of humanity (UNDP 2007). Concerning less CO₂ emissions, the European Union and the Nordic countries group together very closely (see Fig. 3.11). Japan ranks already as fourth, also with CO₂ emissions approximately at levels comparable with the OECD average. The USA behave here opposite, with CO₂ emissions considerably higher than the OECD average. Interestingly, this pattern reveals certain similarities with income equality (compare Figs. 3.11 and 3.3). In OECD countries, with more income equality, there are less CO₂ emissions. However, in OECD countries with more CO₂ emissions, there is also less income equality, or more of an income inequality (formulated here as a proposition). Among the observed OECD countries and country clusters, conclusively Europe (European Union, and the Nordic countries) expresses less CO₂ emissions than Japan and the USA. The record of the USA is here the least favorable. As a general tendency, levels of CO₂ emissions decreased in all identified OECD country groups during the 2000s and 2010s, which should be valued as a good sign. However, after 2012, this decrease again slowed down. This, obviously, represents again a critical trend in the more recent years.

5. *Comparative contrast profiles of the USA, the Nordic countries, the EU15 and EU28*: The USA, the Nordic countries and the European Union are frequently being treated as "role models" of and for democracy. This provides a rationale for again comparing focused

and summative these three country groups. The USA often qualifies as a “liberal democracy” (Sodaro 2004) or also as a *Liberal Welfare Regime* (Esping-Andersen 1990). The European Union is closer associated with social welfare systems or also “social democracy” (Sodaro 2004, p. 48). The Nordic countries, in particular, are typologized as *Social-Democratic (Universal) Welfare Regimes* (Esping-Andersen 1990). The Nordic countries and European Union overlap not completely, but substantially.

5.1. *The USA and Nordic countries in comparison:* Of the 11 indicators or dimensions, which we conceptualized and measured empirically in context of our comparative multidimensional index-building, the USA lies only in three indicators ahead of the Nordic countries. These are: economic freedom, GDP per capital and tertiary education (see Figs. 3.3, 3.9 and 3.10). Concerning the other eight indicators or dimensions, the Nordic countries lead (partially unambiguously) higher-ranking than the USA. This Nordic country lead also refers to and includes political freedom, both equality measures (gender equality and particularly striking concerning the income equality), the composite redesigned Human Development Index, the non-political sustainable development as well as the “Comprehensive sustainable development.” With the exception of GDP per capita and tertiary education, the Nordic countries outrank and outperform the USA with regard to the other indicators of sustainable development. We can expect that the lead of the USA, concerning GDP per capita, is being substantially counterbalanced by the circumstance and empirical fact that income equality is by far greater in the Nordic countries. It could be asserted that the higher levels of economic freedom in the USA add and contribute to the higher levels of GDP there. However, when higher GDP is also being accompanied by larger income inequality, so what are then the remaining positive effects for the average American citizen? *Summarizing our empirical findings, the proposition could be set up that, based on our empirical indicators, the quality of democracy has developed to higher levels in the Nordic countries than in*

the USA. In that sense, the Nordic countries behave and qualify more as a global benchmark, reference and country reference cluster for quality-of-democracy to the world than in the case of the USA. In that rationale and line of thinking, the USA could learn substantially from the Nordic countries (Carayannis and Kaloudis 2010). But, to emphasize this here again as a general statement, every system, country and democracy can and should learn from the other countries and democracies, so also the Nordic countries from the USA. For example, the (marginal) lead of the USA, concerning tertiary education, should be treated seriously by the Nordic countries.

- 5.2. *The USA and EU15 in comparison:* The comparative analysis of indicators, dimensions and outcome of the USA and EU15 refers to a much more balanced picture than in the case where we compared the USA with the Nordic countries (where, by and large, the Nordic countries lead). Focusing and refocusing now on the comparison of the USA with the EU15: The USA leads by five indicators and the EU15 by four, and for two indicators, we should state a too-close-to-call balance. The USA leads with regard to: economic freedom, redesigned Human Development Index, non-political sustainable development, tertiary education, and GDP per capita. The EU15 leads concerning: income equality, gender equality, life expectancy, and less (lower) CO₂ emissions. Political freedom and “Comprehensive sustainable development” are more undecidable; here the USA and EU15 behave and perform balanced in relation to each other. Based on these empirical findings, several (partially competing) propositions could be set up for further discussion. *In the following, we want to elaborate on three of such possible propositions and want to develop arguments from different perspectives:*
- (1) The USA leads in more indicators (dimensions) than the EU15, this may point to a marginal advantage of the USA.
 - (2) The USA and EU15 developed different profiles of competences and patterns of quality of democracy. *The USA, as a country, system and democracy, focuses more on core categories of dynamic economic growth, leveraging economic freedom, and*

promoting and leveraging the dimension of knowledge, since knowledge functions as a crucial input for economic growth and performance in context of the knowledge economy and knowledge society. The EU15 (when compared with the USA) follows more the approach of a balanced development in equilibrium, recognizing and acknowledging equality, and emphasizing more the social and ecological dimensions. Challenges for EU15 may be the mobilization of dynamic economic growth, and a greater emphasis to be placed on the dimension of knowledge. Challenges for the USA are a sustainable growth, since the dynamics of USA growth is overshadowed by greater (economic and social) inequalities. In a quality-of-democracy concept, emphasizing more the spheres of equality, the EU15 ranks higher than the USA. In a quality-of-democracy concept, favoring opportunities of economic growth and dynamism, the USA may have the cutting edge. The dilemma, of course, is that in the long run equality and economic growth are mutually dependent, and this challenges the EU15 as well as the USA. These profile differences of the USA and EU15 also imply (particularly, when the practical effects of empirical indicators are known and when linked to the building of conceptual models of democracy and the quality of democracy) that one-sided models could be designed in a way so that they one-sidedly either favor the USA or the EU15: conceptual emphasis on dynamic growth of the knowledge economy plays to the favor of the USA, whereas a conceptual emphasis on equality and the social and ecological dimensions plays to the favor of the EU15. Interestingly, freedom, and here most notably political freedom, does not provide either the USA or the EU15 an advantage (competitive advantage) over the other.

- (3) The balanced (almost equal) lead of the USA and EU15 in different indicator areas (five indicators point to the favor of the USA, four to the favor of EU15, and 2 are undecided) creates here a situation of balance (paradoxical balance). *The USA and the EU15 are caught up in a deadlocked situ-*

ation in a stalemate, implying that the USA and EU15 are at par (from a whole aggregated perspective). This means that it is too close to call, whether the quality of democracy is more advanced in the USA or in EU15. The conceptual model and the techniques of measurement, accompanying our comparative multidimensional index-building, have the “unsharpness” of not providing certainty, whether the USA or EU15 occupy the lead position. Any assertion or claim of a (ranking) leadership would be (too) vague, since it could only be achieved by giving different methodic weight to different indicators or by dropping some of indicators from the list of applied indicators. This would give “subjectivity” very much room, meaning that both propositions (a lead of the USA as well as of EU15) could be argued and model-based verified. This is being furthermore emphasized (also symbolically) by the circumstance that two (for quality-of-democracy) crucial key indicators themselves, political freedom and sustainable development, do not allow predicting a clear lead of the USA or EU15. This also could be interpreted as a deadlock situation in and of ideology. Despite their difference, also ideological differences, the performance of democracy does not differ sufficiently enough to say, whether the quality of democracy is higher developed in the USA or in the EU15. Based on subjective preferences, the underlying values and driving ideologies appear more or less preferable to an observer or a single actor, however, assertions of supremacy of a specific ideology are not linked to a clear lead in the performance scoring. What does this tell us about the explanatory power of theories, concepts and ideologies that we have at our disposal and our use, for the moment? Is there still too much conceptual fog involved? Perhaps we would have to progress here to a next-stage meta-perspective, which, however, is not on the horizon of our current mainstream thinking. Even should there be such conceptual (theoretical) prospects, this balance of not-being-able-to-decide may also migrate to the next higher meta-level. Some individual member countries (member states) of EU15 rank higher than the USA. For

example, when we take “Comprehensive sustainable development” as a benchmark indicator for the quality of democracy, in 2016, then no less than eight member countries of the EU15 rank higher than the USA.⁹ On the other hand, of course, also the USA could be disaggregated into its 50 member states, calculating scores of “Comprehensive sustainable development” for each USA member state individually. This would create a matrix of complex multilevel comparison between the USA and EU15.

- 5.3. *The USA and EU28 in comparison: While the scoring between the USA and EU15 is more balanced (almost undecidable), the balance shifts clearly in favor of the USA, when the USA is being compared with EU28.* Of the eleven indicators (dimensions), used for our comparative multidimensional index-building, the EU28 leads only with respect to four indicators: income equality, gender equality, life expectancy and less CO₂ emissions. The USA leads in both freedom dimensions (but not in political freedom after 2012), in two individual indicators of sustainable development (GDP per capita, and the knowledge dimension), and in the aggregated dimensions of sustainable development (redesigned Human Development Index, non-political sustainable development and “Comprehensive sustainable development”). The lead of the USA in “Comprehensive sustainable development” (a benchmark dimension for quality of democracy) is marginal, the gap is closing, but there is still a (small) lead advantage in favor of the USA. Core dimensions, where EU28 can defend and emphasize a leadership position, are equality, life expectancy and the environment (lower CO₂ emissions). The USA emphasizes leadership in freedom and in a majority of (but not all) indicators of sustainable development (most notably wealth and knowledge) as well as the dimensional aggregations of sustainable development. This, of course, refers us back to the earlier discussion point, which Europe or

⁹See again Table A.2.7 in Appendix.

which European Union indicates a “fairer peer” for comparison with the USA? Since the USA represents such a large-sized country with a large-sized population, this already may pose per se some problems when comparing the USA with small-sized European countries (such as the Nordic cluster), because then, from a pro-American perspective, it could be argued why not picking a few of the best-performing US states for the purpose of a comparison with assessment character? In political real terms, currently, the EU28 exists, and not the EU15. The EU15 was politically a configuration of the past. (In the future, as of 2019, the EU28 may again be downscaled to an EU27, after the UK will have left the European Union.) This may imply a preference of comparing the USA primarily with the EU28. From a pro-European (or pro-EU) perspective it could then be argued, however, that the aggregation of the EU15 should be granted the status of a good, fair and competitive benchmark for the USA, because (at least to a certain extent) the lower performance of the EU28 results from circumstances that several Eastern-Central European countries were integrated in 2004 and 2007.¹⁰ Performance problems of the Eastern-Central European countries were (and still are) substantially caused by the deficiencies of the communist regimes during the era of Soviet control over these regions and their long-lasting legacies and outcomes (Campbell 1994). Functional deficiencies of communism had roots different than the political, economic and social regimes of the EU15 in Western Europe. The extension of EU membership to Eastern-Central European countries actually intended also to support sustainable development there. Therefore, the EU15 should qualify as the “fair peer” (fairer peer) for comparisons with the USA. Thinking in methodic terms, what would be the effects for empirical results and the quality of democracy, when the USA, Canada and Mexico would be aggregated to a country cluster of “North

¹⁰See on that chronology: https://europa.eu/european-union/about-eu/history_en.

America”? This may be justified by arguments that all three countries belong to the OECD and that North America has an aggregated population closer to the population size of EU28. To further illustrate this point: regarding “Comprehensive sustainable development,” and again referring to the year 2016, 13 countries ranked higher than the USA, of which 10 were European, and of these again 8 belonged to the traditional core or EU15.¹¹ To turn this observation: None of the EU28 countries, not belonging to the historical core of EU15, ranked higher than the USA. *Trying to balance these pros and cons arguments together into a meta-perspective, we probably have to say that there can be in-permanence competing and conflicting arguments and opinions, whether the EU15 or EU28 serves as a better reference or fairer peer for comparisons with the USA. One way how to balance methodically such conflicting viewpoints is exactly to compare the USA always with both, the EU15 and the EU28.* This allows at least specific and individual assessment, counter-balancing effectively one-sided interpretations.

6. *Comparative contrast profiles of Liberal Welfare Regimes, the Nordic countries (Social-Democratic [Universal] Welfare Regimes) and Conservative Welfare Regimes:* In the empirical analysis before, we compared the USA with the Nordic countries, the EU15 and EU28. *In the following section, we want to rerun this analysis, by referring explicitly to the (already discussed) welfare regime typology of Gøsta Esping-Andersen (1990).* For the so-called Western OECD countries, Esping-Andersen suggests the following three-fold typology (in his conceptual core approach): the *Liberal Welfare Regimes*, referring to Canada, the USA, United Kingdom, Australia, and New Zealand; the *Social-Democratic (Universal) Welfare Regimes or Nordic countries*, based on Denmark, Finland, Norway, and Sweden; and the *Conservative Welfare Regimes*, being represented by Austria, Belgium, France, Germany, Italy, the Netherlands, and Switzerland. We want to test and inquire analytically, whether a comparison based on this

¹¹See again Appendix Table A.2.7.

typology provides different empirical results in contrast to the comparison of the USA with the Nordic countries and EU15 and EU28. The timeline, being applied here, is shorter, running from 2002 only to 2008. Further, the indicator base has been expanded by one indicator, being technology diffusion in the form of internet users per 100 people (World Bank 2018). Also, the country references now are the USA, EU15 and EU27 (EU28 without Croatia).

6.1. *The Liberal Welfare Regimes and Nordic countries (Social-Democratic [Universal] Welfare Regimes) in comparison:* Of the twelve covered indicators (dimensions), the Liberal Welfare Regimes lead only in two areas, these are economic freedom and GDP per capita. In all other ten indicators (dimensions), the Nordic countries are leading ahead. The USA still could achieve a ranking lead in three indicators, namely economic freedom, GDP per capita and tertiary education. When compared with the Liberal Welfare Regimes together, then the Nordic countries perform better with regard to tertiary education.¹² *This encourages formulating the proposition that the USA alone performs somewhat better and more competitive than the whole five-country aggregation of the Liberal Welfare Regimes: here comes into play that the USA realizes a comparatively high achievement rate of tertiary education.* For example, in 2008, based on the indicator of tertiary education, only five countries ranked higher than the USA. Among these were South Korea, Finland, Greece, and Slovenia.¹³ *Formulating a more general proposition, we can assert (reassert) that by tendency the Nordic countries (Social-Democratic [Universal] Welfare Regimes) outperform the Liberal Welfare Regimes as well as the USA, not in all indicator domains, but in a majority of indicators (dimensions).*

¹²Only in 2002, the Liberal Welfare Regimes rank higher on tertiary education than the Nordic countries. In all of the following years (2003–2008), the Nordic countries rank here higher.

¹³Number-one-ranking country (in 2008) for this indicator was Cuba. We already discussed the pros and cons or plausibility of that circumstance or datum attribute (World Bank 2018).

6.2. *The Conservative Welfare Regimes and Nordic countries (Social-Democratic [Universal] Welfare Regimes) in comparison:* The Conservative Welfare Regimes lead only in two indicators marginally ahead of the Nordic countries, which are life expectancy and lower rates of CO₂ emissions. In all other indicators (dimensions), the Nordic countries rank higher, partially substantially higher, thus outperforming the Conservative Welfare Regimes. The Nordic countries lead in the dimensions of freedom, equality and all aggregations of sustainable development, including “Comprehensive sustainable development” that can be regarded as a broad measure for the quality of democracy. With the exception of Norway, the Nordic countries (as being typologized here, and in accordance with Gøsta Esping-Andersen 1990) belong to the European Union, also the Conservative Welfare Regimes, with the exception of Switzerland. In that understanding, at least to a certain extent and for the purpose of reasoning and assessment here, we may interpret (with exceptions) the Nordic countries as the Nordic region within the EU and the Conservative Welfare regimes as the (as a core) Continental European region within EU. The Nordic EU region scores mostly and considerably better across a wide range of indicators and dimensions of performance and quality of democracy than the Continental EU. *Does this imply that the Nordic EU region represents the most (several-country) advanced region within the EU? For the further development of Continental EU as well as of the whole EU, therefore, the Nordic EU and the Nordic countries serve as a crucial reference and benchmark, which should be carefully analyzed and assessed. The Nordic countries, at least to a certain extent, present here a role model for progress and progressing quality of democracy, for and to the EU and the entire world.* The assertion of a role-model-quality of the Nordic countries is not of an ideological nature, but is based empirically on indicators and performance (on the “Nordic model,” see also Carayannis and Kaloudis 2010, pp. 10–15). One interesting circumstance, however, which should be noted is that despite the general lead of the Nordic countries, life expectancy in the

Conservative Welfare regimes (Continental EU) is higher than in the Nordic countries, only marginally, but still.

- 6.3. *The Liberal Welfare Regimes and Conservative Welfare Regimes in comparison:* Of the twelve indicators (dimensions), covered by our model of comparative multidimensional index-building, the Conservative Welfare Regimes lead only in four indicators: income equality, gender equality, life expectancy, and less CO₂ emissions. In all the eight other indicators (dimensions), the Liberal Welfare Regimes are leading. Alternatively, one may assert that four indicators are also too-close-to-call for a real ranking trend: gender equality (with a marginal shift in favor of the Continental Welfare Regimes as of 2007), on the one hand, and political freedom, non-political sustainable development and “Comprehensive sustainable development” on the other, with only a marginal advantage for the Liberal Welfare Regimes, and a gap even smaller for non-political sustainable than for “Comprehensive sustainable development.” *Here even the proposition could be put forward that concerning the ranking and performance of aggregated non-political and “Comprehensive sustainable development,” the Liberal and Conservative Welfare Regimes are deadlocked.* This alternative interpretation would have the effect on the assessment of scoring that the Liberal Welfare Regimes lead with regard to five indicators (dimensions), the Conservative Welfare Regimes lead in three indicator domains, and for four more indicators (dimensions) it cannot be clearly decided, to which favor they play. *Put in summary, the Conservative Welfare Regimes express a ranking advantage in equality, the Liberal Welfare Regimes in freedom, while for sustainable development these two types of welfare regimes are caught up in a stalemate. What is so interesting about these empirical results is that they basically reproduce (at least by tendency) the same ranking results and ranking leads when the USA is being compared with the EU15 as well as EU28. So the country-regrouping of the USA into the Liberal Welfare Regimes and the country-regrouping of the EU15 and EU28 into the Conservative Welfare Regimes does not produce a different ranking outcome for that*

particular type of aggregate comparison, even though some of the countries shift groups (for example the UK and Switzerland). We see, how influential the USA impacts the aggregate scores for the Liberal Welfare Regimes and how influential the scores of the Conservative Welfare Regimes are for the aggregate scores of EU15 and EU27 (EU28). *This may lead to the proposition that two “parallel types” of role models may be asserted that mark specifically possible contrast points for comparisons: the USA and/or Liberal Welfare Regimes, and the EU15, EU27, EU28 and/or Conservative Welfare Regimes.* Does this allow portraying the USA as a prototype of a liberal welfare regime and the EU15 (EU27, EU28) as a prototype of a conservative welfare regime? In the case of the USA, such an assertion probably has more plausibility. In context of the European Union, however, two types of (ideal-typical) welfare regimes coexist, at least according to Gøsta Esping-Andersen (1990), when we want to refer to his typology: the (Continental European) Conservative Welfare Regimes and the (Nordic) Social-Democratic (Universal) Welfare Regimes. We already noted a slight difference in the ranking of indicators, when we compare the Nordic countries (Social-Democratic [Universal] Welfare Regimes) either with the Liberal Welfare Regimes (comprising the USA) or with the USA alone. The Nordic countries perform somewhat stronger against the aggregate Liberal Welfare Regimes (by one indicator) than the USA as a single country. *What, however, is more important is that while the (Continental European) Conservative Welfare Regimes cannot outperform either the Liberal Welfare Regimes or the USA,¹⁴ the Nordic countries (Social-Democratic [Universal] Welfare Regimes) outrank the USA in a majority of indicator domains (dimensions). Implications of this are that based on the conceptual welfare-regime-typology of Gøsta Esping-Andersen (1990), there exist or coexist in Europe at least two*

¹⁴In fact, the (Continental European) Conservative Welfare Regimes are partially in a defensive and lower-ranking position against the Liberal Welfare Regimes and USA.

different types of welfare regimes, the (Continental European) Conservative Welfare Regimes and the Nordic countries (Social-Democratic [Universal] Welfare Regimes). This difference in typology also manifests itself in a different performance. After all, differences in European welfare-regime-performance provide additionally crucial conceptual legitimacy to the welfare typology of Esping-Andersen.

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