

WORK AND WELFARE IN EUROPE

Combating Poverty in Local Welfare Systems

Active Inclusion Strategies
in European Cities

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Edited by Håkan Johansson
and Alexandru Panican



Work and Welfare in Europe

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Combating Poverty in Local Welfare Systems

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Abbreviations

ALG II	Arbeitslosengeld II, Minimum income scheme for jobseekers
ALMP	Active labour market policies
ALZ	Arbeitslosenzentrum, Center for Unemployed
ATC	Agenzia Territoriale per la Casa - Territorial Agency for the House
CAF	Centro di Assistenza Fiscale—Tax Advice Centre
CCP	Community Planning Partnership
CdSP	Compagnia di San Paolo
CEE	Central and Eastern European countries
CLA	Centre for Local Activity
CSO	Civil Society Organisation
DWP	Department for Work and Pensions
ESA-I	Income-Based Employment and Support Allowance
ESF	European Social Fund
FEA	Bundesagentur für Arbeit, Federal Employment Agency
FWA	Free Welfare Association
GCC	Glasgow City Council
GDP	Gross Domestic Product
HMRC	Her Majesty's Revenue and Customs
INPS	Istituto Nazionale di Previdenza Sociale, National Institute of Social Security
ISB	Initiative Sozialgewerblicher Beschäftigungsinitiativen, Association of Social Employment Initiatives

ISEE	Indicatore della situazione economica equivalente, Equivalent Financial Position Indicator
ISTAT	Istituto Nazionale di Statistica, National Institute of Statistics
JBG	Jobs and Business Glasgow
JCP	Jobcentre Plus
JSA-I	Income-Based Jobseekers Allowance
LAU I	Local Administrative Unit 1
MIP	Minimum Income Protection
MIS	Minimum Income Scheme
MSAO	Municipal Social Assistance Organisation
NASpI	Nuova Assicurazione Sociale per l'Impiego, New Social Insurance for Employment
NGO	Non-Governmental Organisation
NHS	National Health Service
NSC	New Social Card
NUTS	Nomenclature of Units for Territorial Statistics
PES	Public Employment Services
PiS	Law and Justice Party
PO	Civic Platform Party
PSL	Polish People's Party
RMI	Redito Minimo d'Inserimento
SGB II	Second Book of the Social Code
SNP	Scottish National Party
SPD	Sozialdemokratische Partei Deutschlands (German Social Democratic Party)
TSO	Third-sector organisation
WTC	Working Tax Credit
WP	Work Programme

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1

A Move Towards the Local? The Relevance of a Local Welfare System Approach

Håkan Johansson and Alexandru Panican

Challenges to National Models of Welfare

Fighting poverty and promoting social inclusion is a major challenge for most European welfare states, especially in the light of the 2008 financial crisis. The European Union (EU) has been extraordinarily interventionist in debates and has made the fight against poverty one of its five main EU 2020 headline targets. Under the banner of an ‘active inclusion strategy’, member states are encouraged to provide sufficient income support, inclusive labour markets and quality services, pursuing such policies in a coordinated manner at local, regional, national and European level, between policy areas (minimum income support, activation *and* social services) and among actors (public *and* non-public), as a means of fighting poverty and social exclusion. The request for a multi-pillar approach and coordinated actions and actors is put forward as the best way of combating ‘the persistence of poverty and joblessness and the growing complexities of multiple disadvantages’ (EC 2008/867, 2008; see also Küntzel 2012; Frazer and Marlier 2013; Clegg 2013).

The EU's active inclusion strategy resembles other EU strategies, as a form of a social investment approach to the challenges European welfare states are facing (EC 2013; Morel et al. 2013). Despite a growing political and academic interest into these issues, and despite the fact that it is at local level that most welfare policies are put into practice, except for research into social services, previous welfare studies have, to a large extent, focused on *national* policies, *national* reforms and *national* schemes and neglected to explore the relevance of a local dimension for comparative welfare research (Andreotti and Mingione 2014). We argue that the relevance of the local dimension is particularly pertinent in the light of three different, but inter-related trends that encourage us to rethink much of welfare research: state rescaling, a shift from contributory to non-contributory schemes and greater involvement of civil society actors in fulfilling welfare needs.

Firstly, many social scientists believe that the 'stateness' of contemporary welfare states is challenged 'from above', whether 'above' is called globalisation, Europeanisation or denationalisation. It is commonly held that this condition limits the de facto sovereignty of national governments, requires stricter budgetary discipline and new regulative measures, narrows the range of legitimate policy options and instruments at state level and shifts the balance between politics, markets and international courts as sources of material advantage, security and protection against risks. In relation to *national* welfare state regulation, such analytical accounts suggest that national governments' capacities in decision-making have been complemented by new international regulations, stemming from the EU and other international organisations (Graziano et al. 2011; Frazer and Marlier 2013). Processes of 'upward' rescaling—either expressed in terms of economic globalisation or as part of the construction of an internal market within the EU, including greater labour market mobility across borders—have thus diminished national governments' ability to make autonomous decisions and their capacity to enforce political decisions. Internationalisation and globalisation hence place nation states and national regulative institutions in a novel situation as these can no longer act as *the* regulative power in a wide range of policy areas.

In the context of European welfare states, processes of rescaling have often been spurred by developments at EU level (Ferrera 2005). National governments appear to be less capable of determining economic and social developments within their national boundaries (Kvist and Sari 2007).

Barbier (2013) proposes that European welfare states now have hybrid and multi-layered structures as they are embedded in the (social) policy-making apparatus of the EU, amplified in the EU's active inclusion strategy. Hemerijck (2012: 293) and others maintain that European welfare states are developing in an interactive evolution with the EU, as a form of institutional 'co-evolution'. Ferrera (2005) addresses the relations between national welfare states and the EU as a form of 'nested social policies', that is, domestic reforms take place within the context of European economic and social policies.

Whereas the aforementioned reform processes seem to challenge central and national level policy-making as a natural unit for analysis, supported by the EU's interest into the principle of subsidiarity, it is also evident that welfare policies and programmes are increasingly being challenged as national constructs 'from below', expressed as arguments in favour of the decentralisation of welfare policies and services (Panara and Varney 2013; Pollitt and Bouckaert 2000; Pollitt 2005; van Berkel et al. 2011). Across Europe, there is a trend for citizens to challenge long-established bureaucratic or paternalistic modes of administration that are viewed as rigid and inflexible. The notion of individualisation suggests, among other things, that people have become more knowledgeable, self-confident and conscious of their rights when dealing with frontline agency staff and professional helpers. These people expect—and are expected—to have the option of influencing decisions relating to their own welfare, whether these options are expressed through co-determination, user involvement, informed consent, group consultation or freedom of choice. Such demands for greater flexibility have certainly put pressure on a series of social security systems, but even more so on the delivery of social services, as clients, users and consumers expect to encounter more flexible solutions, adjusted to their particular circumstances (Hvinden and Johansson 2007).

Similar concerns are also being raised in relation to achieving greater participation or even more influence over the design, implementation and delivery of welfare policies and services. Throughout Europe we are seeing the emergence of new discourses on citizens' involvement as well as the establishment of new forms of civic participation beyond representative democracy (Grote and Gbikpi 2002; Fung 2004; Fung and Wright 2003). Governments are increasingly experimenting with new forms

of citizen participation, citizen forums and deliberative innovations. Within the area of welfare policies, these efforts seem to be expanding established forms of participation, including not only long-term actors (e.g. social partner organisations), but also self-help groups, user organisations, community-based organisations and other civil society actors speaking on behalf of marginalised groups (Newman et al. 2004; Barnes et al. 2007). Whereas traditional forms of political participation were mainly acted within the arena of national politics, these new experimental forms of participation often seek to engage local stakeholders in affairs that directly affect them.

These pressures ‘from above’ and ‘from below’ coincide with the observation that localism ‘is back on the political agenda’ (Featherstone et al. 2012: 177) and much emphasis in the re-scaling debate suggests that subnational (regional and local) arenas, entities, cities and urban conglomerates have become a more important level for certain public policy regulation and delivery (Mingione and Oberti 2013; Kazepov 2008, 2010). The solution to the challenges of modern governments does not lie in more extensive supranational coordination. Instead, the solutions to the complex set of problems many national governments face ought to be sought in subnational, regional or local, risk protection (Brenner 2004; Fyfe and Milligan 2003). Albeit that much social policy remains under the responsibility of national institutions (e.g. pensions and many other social security benefits), the mechanisms behind many social risks (e.g. poverty, economic exclusion or homelessness) and the greater diversity of life courses, risks, needs and preferences arguably require concerted efforts and close dialogue in the arena where people live and act—in local contexts.

The significance of exploring local-level studies into the topics of poverty and active inclusion is even more relevant considering that politicians turn to local solutions may in fact be interpreted as avoiding the responsibilities of European welfare states—a kind of ‘austerity localism’ (Featherstone et al. 2012; see also Council of Europe 2011). Arguably, rescaling and decentralisation could have adverse consequences for welfare and social policy provision (Brenner 2004; Ferrera and Rhodes 2000). From this perspective, welfare provisions and services previously provided at national level and then deliberately decentralised to local level do not necessarily improve problem-

solving capacities but might well create new—or reinforce already established—patterns of exclusion and/or conflicts over redistribution. A greater role for local welfare might also lead to increased inequality among regions and locations within a national state, with correspondingly different regional or communal capabilities to finance welfare, as well as challenging already weak understanding of social rights and social citizenship in European welfare states. The consequence of decentralisation and localisation may hence be greater cross-territorial disparities, greater social inequalities, more fragmented solidarity and unfair burdens on marginalised groups (Kitson et al. 2011). This combined with a potential greater reliance on non-public efforts creates a complex and partly ambiguous system of local-level welfare provision, with a complex set of actors involved.

Second, the current financial and economic crisis calls for a renewed approach to the relevance of *national* social policies and *national* income protection schemes. What started as a financial crisis has evolved into an economic, political and—without doubt—social crisis across the European continent (Brancaccio and Fontana 2011; Jenkins et al. 2013; Taylor-Gooby 2013). In the wake of the crisis, governments at various levels are currently facing increasing levels of unemployment, higher levels of long-term unemployment and new, more complex forms of social exclusion. Although different European countries face different challenges and have a range of capabilities for developing responses, observers tend to agree that the present crisis has either directly or indirectly given birth to a series of austerity packages that often aim to cut public spending, social security benefits and social services (Greve 2012). Southern European countries have been most severely affected (Gutiérrez 2014; Matsaganis 2011; Petmesidou and Guillén 2014), but also countries with other welfare regimes are facing greater pressures on public spending, partly due to pressures on financial and economic systems and partly due to changes in ideological orientation. Some of the Nordic countries seem to have managed fairly well, but even in these supposedly comprehensive, egalitarian and redistributive welfare states we can observe welfare reforms that promote more selective, targeted and narrower welfare systems (Greve 2012; Kvist and Greve 2011; Vis et al. 2011).

Changes of these kinds have paved the way for a set of far-reaching reform processes within European income protection systems. Clasen and Clegg's (2011) investigations into European unemployment protection shed light on a series of reform processes, one of them being that several European countries tend to put greater emphasis on non-contributory and means-tested benefits like minimum income schemes, social assistance schemes and similar. Marx and Nelson argue that with the 'return of mass unemployment in Europe, [...] cutbacks in first-tier social benefit programmes in some places and changed demographics, minimum income protection has become more important as a safeguard against low income and poverty in parts of Europe' (Marx and Nelson 2013: 7). Traditional national social protection solutions are arguably no longer viewed as the key option for people suffering from financial distress in times of unemployment or even sickness. Either directly, via straightforward reforms, or indirectly, by not increasing benefit levels or by tightening eligibility rules, it appears that contributory- and insurance-based unemployment protection is, to a greater extent, becoming complemented by various types of minimum income protection schemes or by a renaissance in means-tested safety net of last resort schemes like social assistance. Traditionally non-contributory schemes in general and social assistance schemes in particular were seen as a residual form of support, yet these gain in importance when governments are under pressure to find more financially viable solutions, also when larger cohorts of the population can no longer enter the regular labour market and thus are not entitled to insurance-based unemployment protection.

While most contributory schemes are based on rules and regulations from central government, involve national stakeholders and are often subsidised by central government (e.g. pensions, sickness insurance, unemployment insurance etcetera), means-tested social assistance schemes are embedded in local contexts and are in the hands of local governments (Kazepov 2004; Saraceno 2002). The regulation of minimum income and social assistance schemes certainly varies across Europe (see Chap. 4 by Clegg in this volume), but most national schemes tend to include local governments as either a direct decision-maker or at least a local decision-taker, allowed and required to engage with and adjust to local circumstances. In disparate welfare states, like Italy and Sweden,

local governments have almost complete responsibility for such support schemes. Countries such as the UK or Germany, with highly centralised regulations, can also provide room for manoeuvre for local decision-makers allowing for adjustment to local circumstances. Considering that many comparative studies have primarily focused on social insurance and contributory benefit programmes, the growing significance of non-contributory and means-tested schemes thus calls for a renewed research focus into the significance of the local setting for the design and delivery of minimum income protection and social assistance support, preferably as a comparative study. This is even more pertinent considering that it is at local level that coordination between the three pillars of the active inclusion strategy is put into practice, that is, between income support, activation offers and access to social services.

Third, while income protection schemes can cater for some people's needs, it is becoming increasingly obvious that such schemes can only handle the complex issue of poverty to a certain extent. The gap between formal public schemes and individuals' needs seems to be widening as civil society organisations, such as third-sector organisations (e.g. charities, voluntary organisations, user and community groups), become more involved as welfare states are failing to deliver support and services. Organisations such as the Red Cross report that they experience a 'growing number of people living below the poverty line and needing assistance, and also a rise in the intensity of poverty, whereby those who were already poor are now poorer, as well as a widening gap between the rich and the poor. This means that those living at the margins of mainstream society—and those who are socially excluded—have grown in numbers and the distance to re-socialise, rehabilitate, find a job and re-join society has also increased' (International Federation of the Red Cross 2013: 5; see also Caritas Europa 2012; EESC 2012).

Across Europe various types of civil society organisations are invited and/or expected to step in when the welfare state 'fails' to deliver support and services for the most marginalised groups in societies. To an increasing extent, civil society organisations develop services and support for members and beneficiaries, sometimes directly working on public contracts, sometimes based on their own initiatives. This has also implied a new set of governance arrangements between public and civil society actors. Ranging

from loose collaborative networks to more formalised partnership arrangements and direct contracting-out models, new forms of relations and interactions are being constructed between public and civil society actors, illustrating the complexities of horizontal coordination which include the many forms of governance mechanisms embedded in such horizontal relationships (Brandsen et al. 2014; Bode et al. 2014; Boivard 2014; De Corte and Versheure 2014; Furneaux and Ryan 2014). In some European welfare states, the greater involvement appears to be a ground-breaking event since these have primarily relied on public efforts and universal social assistance schemes, while in other countries, local welfare organisations, such as community groups, charities and foundations, have always played a significant and essential role in local welfare provision (Bode 2006; Evers and Laville 2004). Such innovations primarily materialise at local level as a way to mobilise actors and resources and build new avenues for political participation, often in relation to user groups rarely involved in ordinary political debates (Bode and Brandsen 2014). This illustrates a more complex welfare mix, in which civil society actors are involved in the deliberation, design and delivery of support and services for various groups.

Purpose and Research Questions

These debates on rescaling, the renaissance of non-contributory welfare, combined with changes in the welfare mix, challenge us to develop a new set of research questions that conceptualises both state and local welfare in a novel manner.

This book takes stock of research into minimum income provision (e.g. social assistance models and regimes) and notices, interestingly enough, that this has focused on national reforms, national policies and national schemes as the main object of study, despite the fact that it is at local level that most such policies are put into practice. We find research into national minimum income/social assistance models and regimes (Eardley et al. 1996; Gough 2001; Gough et al. 1997; Bahle et al. 2011; Cantillon et al. 2004; Immervoll 2009; Marchal et al. 2011; Marx and Nelson 2013) and studies that compare the coverage, amount and duration of benefits as well as the distributive effect of national minimum income

schemes (Gomes 2014; Marchal et al. 2014; Peña-Casas and Ghailani 2013). More recently there has also been extensive research into the ‘activation turn’ in income provision, in particular in social assistance support (Hvinden and Johansson 2007; Lødemel and Trickey 2001; Lødemel and Moreira 2014). Only a few studies have however, deliberately sought to analyse local social assistance provision from a cross-European perspective (Saraceno 2002; Ranci et al. 2014). This calls for more extended analyses into how public efforts to combat poverty and promote active inclusion are organised and put into practice at local level and remodelled according to local conditions, cultures and agency organisation.

This book also takes stock of existing research into the role and function that local civil society organisations, such as third-sector and voluntary sector organisations, play at local level, providing support and services for poor and socially excluded groups. Research into welfare mix and the voluntary sector have traditionally focused on the macro-institutional design of national models (Bode 2006; Evers and Laville 2004, Salamon and Anheier 1998), yet more recently focused on issues of governance and organisational hybridity (Anheier and Krlev 2014; Skelcher and Smith 2014; Smith 2014), or co-production as a particular form of service provision (Brandsen and Pestoff 2006; Pestoff et al. 2012). However, existing research on welfare mix and the service provider function of third-sector and voluntary organisations focus primarily on various types of social services and less so on the involvement such actors play in relation to the financial needs of poor and socially excluded groups (e.g. Saraceno 2002). This is due to historical and structural reasons, yet due to the present crisis, new topics of investigation are to be placed on the agenda. In correspondence, traditional welfare research (including research on minimum income and social assistance provisioning) pays limited attention into the role and function of such non-public actors in catering for the needs of various groups and the efforts and attempts of voluntary organisations, charities and third-sector organisations to provide support and services for their members, beneficiaries and citizens in need. Our studies seek to contribute to these academic debates by studying public and civil society mutual cooperation and efforts to combat poverty and social exclusion in combination as two essential and intertwined aspects of local welfare systems.

The book thus builds upon, but also aims to expand existing research since the local level has been largely neglected; a more complex understanding of efforts to combat poverty and promote active inclusion needs to address how such schemes and efforts are organised and put into practice at local level and (re)modelled according to local conditions, cultures and agency organisation, as part of local welfare systems. The overall purpose of the volume is *to analyse the structure and composition of local welfare systems in European welfare regimes, with a particular focus on local anti-poverty strategies in five European cities*. We seek to investigate the role public agencies play in local welfare systems and, above all, in local activities fighting poverty and social exclusion. In addition, what is the role of civil society organisations—third-sector organisations including community groups, churches and charities—in local welfare systems? To what extent has the present crisis changed local governments' and civil society actors' involvement, cooperation and responsibilities in local welfare systems and in local anti-poverty strategies?

Against the backdrop of these overarching research questions, we put forward a set of concrete research topics that guide our comparative investigations: (a) How are local minimum income support schemes organised at local level and to what extent are such schemes coordinated with other related services (activation and social services) into a local active inclusion strategy? (b) What role and function do civil society organisations fulfil in local welfare systems in providing poor and socially excluded groups with support and services, acting as a complement or replacement to public services? (c) What governance arrangements prevail in contacts between public and non-public agencies (partnerships models, contract models or participatory governance arrangements) and to what degree are such local relations imbued by trust and cooperation and/or conflict and contestations?

These research objectives are combined with two more challenging analytical objectives, which, in short, aim to identify factors that shape and/or structure the constitution of local welfare systems in various welfare state contexts (e.g. local problem pressure, degree of local autonomy, degree of local public capacity, role and function of local civil society, traditions of cooperation) and to analyse the constitution of different local welfare systems against the backdrop of different welfare regimes. We generally

define a local welfare system as embedded in wider vertical and horizontal relationships that influence how these systems function, what they deliver and for whom. Local welfare systems thus differs from local governments and local welfare mixes as they are constituted of a set of welfare actors that are directly and indirectly interconnected and embedded in a particular local setting (see Chap. 2 by Scarpa and Chap. 3 by Johansson and Koch for further elaboration).

Studying Local Welfare Systems in Different Welfare Regimes

Our explicit interest in local welfare systems, local anti-poverty measures and local active inclusion strategies requires a brief explanation of the contextual dimension of local welfare system studies and our selection of cases. Five different European welfare states constitute the starting point for our analyses: Italy, Germany, Poland, Sweden and the UK (Esping-Andersen 1990, 1999) and also five cities analysed as local welfare systems. The analyses forms part of a FP7 EU collaborative research project titled ‘Combating Poverty in Europe: Re-organising Active Inclusion through Participatory and Integrated Modes of Multilevel Governance’ (Grant Agreement no. 290,488, see also www.cope-research.eu).

Considering the challenging methodological nature of making comparisons of local cases across country differences, we define these as cases within national contexts, rather than as cases per se (see below for further exploration). Most of the empirical investigations in the volume primarily explore two pillars of the active inclusion approach: in terms of minimum income/social assistance support and local activation services. Furthermore, each local case explores the relevant set-up of local civil society actors, and considering the variety of civil society actors involved in local welfare systems proper conceptualisations and terms used will reflect upon national and local circumstances (for more general conceptual debates, see, for instance, Wagner 2012).

The countries have been selected as they cover as many welfare regime conceptualisations as possible: a liberal welfare regime (the UK), a social democratic welfare regime (Sweden), a conservative welfare regime (Germany), a southern European regime model (Italy) and a post-socialist welfare regime