

Ingo Bode

# The Fate of Social Modernity

Western Europe and  
Organised Welfare Provision  
in Challenging Times



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# Preface

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In a long monograph, at least the preface should be parsimonious – hence a few remarks must suffice to illuminate the background of this book. The latter combines themes that the social sciences commonly discuss in separate places and by speaking to special audiences – sociologists studying the chemistry of Western societies, scholars engaging with social policies and researchers from the field of organisation studies. Blending issues relevant to these different circles, the analysis in this monograph provides both an assessment of recent dynamics of welfare state development (writ large) and a reflection on how to make it align (again) with emancipatory principles anchored in Western modernity. It does so by considering both institutional and organisational dimensions, as well as different stages of the human life course. To be sure, addressing all these issues within one monograph might be considered as ‘outmoded’ and ‘reader-unfriendly’. Nowadays, social science endeavour is often broken down into short academic articles concerned with isolated research questions, even as macro-social theory is in short supply when it comes to the analysis of concrete welfare arrangements. More generally, contemporary social scientists have few occasions to bring variegated perspectives together into one comprehensive piece of work. Against all odds, this book embarks on this very adventure. Of course, it would be naïve to ignore that, in our time, monographs are often read in selective ways. Therefore, the architecture of this book is organised in ways facilitating this ‘mode of consumption’, with options to skip sections or chapters if deemed reasonable. For the rest, it should be stressed that a scholar embarking on ‘internationally-minded’ projects like this can greatly benefit from colleagues anchored in traditions outside of her or his home country. Let me mention just a few institutions I am indebted to concerning such support, that is, opportunities to organise academic stays abroad or to collaborate with colleagues from other nations – namely, the University of Edinburgh and its School of Social and Political Studies where I could dive into the UK ‘world of welfare’ a longer while ago, the ‘Università degli Studi di Bari Aldo Moro’ and its Department of Political Sciences, which invited me for a guest professorship later on and (more recently) the Department of Social Work, Child Welfare and Social Policy at OSLOMET university, which involved me in a focused exchange about some of the issues dealt with in this book, with Ivan Harsløf in particular helping me to sharpen my view on the Norwegian case. Furthermore, Mike Aiken has provided valuable advice and thoughtful language polishing in the long process of developing the argument(s) contained in this monograph. Many others have inspired my writing when dealing with complex subject matter, among whom is Sigrid Betzelt, who has been working with me (and others) on a range of fascinating research and publication projects over the last years. Of course, the ultimate responsibility for the content of this book lies with me – and it remains up to the critical reader to evaluate whether there is still a case for engaging in the kind of social-scientific work that is presented in what follows.

# Introduction: the case for studying the fate of organised welfare provision in Europe

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With more than two decades in the new millennium behind us, those who believe in human progress have many reasons to worry. The financial meltdown and its aftermath, brutal military conflicts, constant aggression against ethnic minorities and immigrants, the time bomb of climate change and exacerbated social inequalities all suggest that humankind struggles with shaping the conditions of life in ways conducive to such progress. It is true that signs of hope are discernible, for instance resistance against authoritarian political forces in parts of the world, or global social movements, such as ‘Fridays for future’, campaigning for a more sustainable development model. Nonetheless, our experience from the last decades makes us wonder whether the times we are living in still contain sufficient space for a deliberative and socially balanced organisation of human affairs on a larger scale. This experience suggests that even advanced societies have floundered in pursuing this mission. It also signals a widespread reluctance to routinely acknowledge the influence of supra-individual conditions on human life and to act upon them by discrete collective measures in order to ensure all citizens achieve a certain level of well-being.

The aforementioned turbulence particularly strikes at the foundations of Western Europe as a territory that once spearheaded the creation of public institutions to ensure the deliberate and rational organisation of human affairs at society level (Delanty 2019) – notwithstanding the paradox that the underlying agenda was long confined to intra-national arrangements while the external relations of European nation states continued to be contaminated by warfare and oppressive colonialism. With the institutionalisation of democratic politics from the end of the nineteenth century onwards, the ‘social question’ increasingly invaded the polity of nation states featuring a capitalistic economy and a long tradition of autocratic rule. Especially during the second half of the last century, this configuration provided fertile ground for the establishment of institutionalised frameworks and settings with a mission to respond to human hardship and to promote social development more generally – for instance, by ensuring mass education, healthcare, human services, a minimum standard of living and opportunities for building convivial networks. Regardless of similar arrangements elsewhere on the globe (e.g., in North America and Oceania), it is fair to contend that those nations which, later on, started to form the European Union proved to be the fulcrum of this movement – meaning all countries signing the Maastricht Treaty in 1992 plus Scandinavia.

However, recent trends in European societies – for example, relentless individualisation, decreasing faith in public communication and political disruptions caused for example by right-wing populists – cast doubt on the willingness of relevant social forces to continue on this path by striving for a fair(er) deal between the rich and the poor, the successful and the disadvantaged, the leaders and the subordinates – and to allow for related policies being sustained by effective institutions and organisations. Over the last decades, most nations in

Western Europe have been less committed to this agenda, even as many observers argue that the ‘golden age’ of democratic capitalism lies long behind us. Hence, for academics studying historical and societal dynamics in this part of the world, it is crucial to unravel what has happened to both the above mission and ambitions to advance it further. The question is: where are we standing now, and where are we heading to regarding this mission? Or to put it more succinctly: is there still a future for human progress?

This book attempts to tackle this conundrum with the help of a distinctive epistemological and sociological approach. It builds on the conviction that unpacking historical and ongoing transformations in the wider society, including their repercussions on the living conditions of the mass population, has always rested at the heart of social sciences and that this core mission has not altered greatly since their inception. In doing so, it borrows from both critical realism and critical theory. As a programmatic approach to the theory of science, critical realism posits that the above transformations are driven by distinctive patterns of human relations and that scientific reasoning can uncover how their interplay produces social outcomes – although these patterns are often convoluted, and it may be difficult to capture the full picture (Elder-Vass 2022). What is sought is a holistic inspection of human-generated phenomena and the (mix of) mechanisms that enable them to flourish – including those at work behind conscious social action. The underlying epistemological approach implies exploring both the material world (e.g., legal norms or economic resources) and cultural phenomena encapsulated in values and normativities (Archer 2014: 9), with a twin focus on outcomes and collective responses to them (Danermark et al. 2002; Porpora 2016). Following this approach, such mechanisms – rather than being imagined epiphenomena or chimeric concepts amidst a ‘liquid society’ (Příbáň 2016) in which ‘anything goes’ – exist ‘out there’ in the world but are irreducible to simple economic or social ‘laws’. Rather, they can often be retraced back to a certain ideational content – which also holds for welfare arrangements and their evolving character, which are the key themes of this book.

Critical theory, sharing important meta-theoretical assumptions with critical realism (Porpora 2016: 192), provides a conceptual framework to uncover imbalances in the wider societal order. This ambition is based on the observation that, within modern Western societies, structural tensions exist between this order and what the majority of people might agree on concerning what could be a ‘fair deal’ for all, once all citizens were fully enabled to do so. Of particular interest are dynamics of rule-making in ‘capitalist modernity’ (Rosa et al. 2017), which are assumed to hamper an open dialogue among citizens about perceived social conflicts and potential solutions in systematic ways. Notably, some accounts rooted in critical theory identify spaces in which related agreements are, or could be, made even in a context shaped by the above tensions. With regard to Western welfare states, they suggest that ‘the objective condition of society’ is not ‘solely one of domination’, and that the many ‘forms of intersubjective exchange which point beyond the current social world’ can probe existing forms of hierarchy – which makes it worthwhile to excavate ‘forms of rationality which are latent’ within that world (Delanty and Harris 2022: 124; 125).

The overall rationale behind this reading appears thoroughly modern. It tightly connects with a long historical period during which economic, political and cultural developments in Western societies became infused with a distinctive set of ontological convictions, epitomised by a certain understanding of ‘modernity’ and human progress. True, many sociologists, including those sympathetic to critical theory, maintain that the assemblage of modernity

undergirds an ‘illusion of progress’ (Bronner 2017: 54). Even in this case, however, related insights may still be used to enlighten those who suffer from extant imbalances and may take action to make the world a better place (ibid 100–103). While various strands of the contemporary social sciences are struggling with how to make sense of humankind’s recent history (see Elliot 2014 or Lemert 2021), numerous scholars would still concur with the idea that their role consists of decoding the coordinates of the established societal order, with an interest in the very mechanisms that enable it to evolve – whether or not these mechanisms have a potential to (re)vitalise the (modern) project of human progress (see e.g., Williams 2016, with respect to social policy-making). As Porpora (2016: 9) has put it, we ‘do want to understand how the social world works and in part we do want to do so to create a better world. Why else are we in the field?’

## COMPLICATED BUT ACCESSIBLE – ARRANGEMENTS FOR HUMAN WELFARE AS A MIRROR OF EVOLVING SOCIETIES

Macro-level agreements that affect the distribution of material wealth and life course opportunities within a distinctive territory are often understood to mirror the regulatory and cultural foundations of a given society. In the Western world, related efforts are – at least partially – rooted in processes of democratic deliberation. Emanating from public opinion building, social compacts or government decisions, they often translate into concrete policies of which some are driven by concerns to establish socially balanced living conditions throughout the above territory. It is commonplace wisdom that such policies embed an economic system that is largely shaped by social forces interested in ‘making money’, that is, by capitalistic agency. Modern capitalism, though being a source of material wealth and prosperity for numerous citizens worldwide, is often assumed to undermine the above efforts as it exhibits a built-in tendency towards creating structural inequality and entrenched power gradients for many (see Midgley 2020: 10–28). It is also widely acknowledged that policies aimed at mitigating this tendency may entail other constraints to human well-being, for instance those produced by apathetic state bureaucracies. In this case, such constraints end up as a source of new problems rather than one of redemption. More generally, the instigation of society-wide agreements is a complicated matter, as is the reconstruction of underlying mechanisms through scientific observation. Such processes are often hard to disentangle, given that current Western societies exhibit a convoluted social fabric, shaped by an immense range of human activities, orientations and interconnections keeping them alive (see Verschraegen 2015).

However, with the aforementioned efforts and policies, macro-level dynamics are transformed into artefacts whose properties can be uncovered by social scientific analysis. A case in point is arrangements for human welfare. In Western nation-states, these arrangements can be considered as society-wide agreements that have translated into tangible instruments with a potential for impacting upon their citizens’ well-being. Thus, a raft of income transfers ‘prevent or alleviate poverty’ (Midgley 2020: 2), even as various human services under public regulation (Bonvin et al. 2018) involve outcomes in terms of well-being which, in the context of capitalism, would otherwise be unlikely to surface. Internationally, such welfare arrangements secure a citizen’s material subsistence in the event of an intermittent loss of revenue; ensure social support in the event of a life accident; or protect people from ‘extreme’ cases of heteronomy. Bolstered by earmarked public or collective funding, they are encapsulated in

diverse artefacts such as insurance schemes, benefit programmes, social administration units or healthcare trusts – alongside plenty of rules defining their remit. Policies and programmes shaping all these instruments can be viewed as civilising the economic system of Western societies and forming the backbone of what is often referred to as (democratic) welfare capitalism (Esping-Andersen 1990; Hay and Wincott 2012; Schröder 2013; Deeming 2017; Azmanova 2020; Lessenich 2023). With the help of these instruments, advanced Western societies organise the provision of welfare outside of the capitalistic economy in systematic ways. This provides us with excellent opportunities for exploring how precisely advanced societies (might) seek deliberative and socially balanced agreements concerning their common affairs.

Hence welfare arrangements are an intriguing theme for studies that are confronted with the arduous challenge of understanding the foundations of social life and dynamics of societal change in the Western world. While it proves ever more difficult to decipher how society is ‘working’ on the whole, such arrangements lend themselves to a focused analysis of the mechanisms that enable it to function or cause disruptions. Importantly, these arrangements, and collective efforts to sustain them, may prompt, but also hamper processes of social development. One distinction to be made for studying such arrangements is the one between ‘devices’ and ‘makers’. The devices include publicly defined regulatory frameworks that ignite systematic activities undertaken by specialised actors. Some of these devices are easy to spot, as they materialise in benefit schemes or human service programmes. Others function indirectly, for instance through ‘protective legislation’ (Olson 2019) that urges private corporations to process economic transactions in distinctive ways, also to their own benefit (in terms of ‘human capital rents’). Examples include the enforcement of a minimum wage, the prevention of work accidents or occupational pension provision. When studying such frameworks, one must consider a large range of rules and tool-kits, such as provisions in labour law or public administration models. These rules and tool-sets constitute elementary institutions in the make-up of what is commonly labelled the modern welfare state.

Concomitantly, the devices of this universe are put into practice by various goal-specific organisations expected to deliver results in regular, accountable and often universal ways. Receiving a mandate to implement institutional rules, these organisations inhabit distinctive ‘welfare sectors’, each featuring a specialised workforce and administrative set-up (for example, social insurance funds; public employment services; social care agencies). At various instances, these sectors are a place for creative collective agency as the involved parties have leeway in doing their ‘job’ and developing extant frameworks further. Accordingly, organisational agents from these sectors are more than mere instruments of a given state administration, which is why this book conceives of them as ‘makers’ of welfare. Together with the devices in use, they are tangible expressions of those macro-level agreements through which complex contemporary societies seek to govern themselves.

Given the critical role of both the above agents and the frameworks that orchestrate their activities, the rules and practices in this realm can be conceptualised as spheres of organised welfare provision. Importantly, these spheres have often been found to be imbued with distinctive (sets of) values (Béland 2016). Although some scholars deny that welfare arrangements in advanced Western societies align with a specific set of normative orientations (see O’Brien and Penna 1998; Gray 2007), it is obvious that the ‘devices’ and ‘makers’ in this universe are *expected* to follow some overarching principles. Bertin et al. (2021: 222; 227) underline this when describing the political climate in twenty-first century Western Europe as being based

on the conviction ‘that certain social risks cannot be an individual problem for individual actors’, arguing that commitments to cater for disadvantaged and vulnerable social groups have ‘been one of the characteristic features of European history’. More generally, the primacy of some (more or less democratically agreed) social considerations over economic concerns is often understood as being a key characteristic of modern nation-states internationally. For some observers, most of these considerations have resisted economic and political challenges throughout the new millennium (see e.g., Kerstenetzky and Pereira Guedes 2021), whereas others stress that they have been eroding in many instances (e.g., Dukelow 2021). Be that as it may, the analysis of the aforementioned arrangements for human welfare reveals a great deal about how, and how far, modern societies are striving for a deliberative and socially balanced organisation of human affairs. It can also provide us with insights into how these societies might pursue this ambition in the times to come.

It is true, among contemporary sociologists, that there is much reluctance to deal with imagined scenarios. While classical accounts on the ‘nature’ of Western society and its evolution – for instance those developed by Marx, Weber or Durkheim – have often offered an outlook as to what might happen during subsequent historical stages, most contemporary social scientists prefer to abstain from this undertaking (but see Delanty 2021). Given the temptation of misusing academic jargon for disseminating simplistic messages that may lead certain audiences astray, such caution is understandable. Furthermore, one may reason that there is no point in reflecting on the future societal order simply because complex societies seem increasingly disarmed when trying to rearrange this order. Such reasoning resonates with (classical) sociological work which insinuates that mankind is increasingly unable to proactively cater for the needs of all (or most) people, pointing to what we know about the dark sides of humanity and its history. This gesture is widely consonant with the message contained in the discourse of influential academics and experts who argue that Western societies can no longer be governed from one single source or via programmes agreed at the macro level of these societies. As noted above, the experience of the last decades seems to confirm such pessimism. That said, larger sections of the contemporary social sciences would still subscribe to the idea that the world could be different under different regulations and that academic scholarship contributes to providing arguments for this – in stark contrast to the ‘positivist’ turn in twentieth century sociology (see Porpora 2016: 11ff) and the lack of enthusiasm for grasping the ‘possible’ with regard to visions of an alternative societal order. Related ambitions should not lead us to ingenious ‘science fiction’, nor can it be comprehensive in any sense; yet, as Porpora (2014: 90) notes, it might help us anticipate ‘futures that might logically ensue from the constellation of forces that are present now’.

As alluded to above, the concept of modernity can be helpful for this purpose. Although deemed outdated by many current sociologists (see Venn and Featherstone 2006), it provides us with a basic tool-set for disentangling complex social dynamics in the past and in the present. Sticking to the tradition of the so-called Frankfurt School, German philosopher and sociologist Jürgen Habermas (1984 [1981], 2005) has applied this tool-set by elaborating on the deliberative capacities of human beings in the making of society. According to his ‘theory of communicative action’, modern people’s life-worlds become more civilised once social groups (and their members) enter into an open debate about legitimate interests, shared preferences and ways to arrange common affairs without burdening ‘third parties’ disproportionately. Habermas has defended this tenet in more recent contributions on the

future of European integration (see Grewal 2019), and it seems that his perspective on the civic potential of advanced Western societies still receives an audience among contemporary academics (Delanty and Harris 2022). These societies have not ceased to produce agreements with the aim of governing their common affairs, hence the current and future nature of this very practice continues to be an interesting subject for the social sciences – and once the above agreements are broken down to the level of tangible welfare arrangements, the analysis of this practice can be accomplished in concrete terms.

Sceptics may argue that the modern promise of civilising human relations failed many times (see Elliot 2014: 40ff). Critical theory stands in the front row when it comes to illuminating the built-in ambiguities of modern thought, such as its ‘rationalistic’ orientation which often collides with (further) ethical prescriptions from the heritage of the Enlightenment (see Subchapter 1.3 of this book). Related tensions had already been addressed in Max Weber’s work on bureaucracy and the emergence of iron cages enclosing the modern citizen at critical instances (Waters and Waters 2015; Weber 1978 [1922]). Later on, this observation has also been an issue in the literature on the technical apparatus of Western welfare states. Thus, it forms a building block within Michel Foucault’s oeuvre in which ‘modern reason’ is presented as being imposed on all human beings through an intertwinement of science-based prescriptions and oppressive social practices, including those produced by modern organisations such as mental health institutions (Oram 2016). These and other ambiguities contained in the Enlightenment project have entailed serious ‘collateral damages’ in ‘real’ processes of modernisation (Bauman 2011), including those dramatic movements in history that led to the startling ‘ruins of modernity’ (Hell and Schönle 2010). Furthermore, even within advanced Western societies, not all social groups support modern norms wholeheartedly (see Norris and Inglehart 2019). People may, for example, favour human rights in theory without being willing to pay the taxes needed to enforce them because they have other priorities (Bremer and Bürgisser 2023). In addition, sociologists are often cautioned against adopting an ethnocentric perspective when dealing with ambitions to civilise social life, given that some parts of the world do not, or only partially, subscribe to orientations inherent in related occidental concepts (see Schmidt 2006). Among other things, these concepts exhibit an ambiguous character in that Western lifestyles and underlying institutional arrangements have flourished, and continue to flourish, while producing negative external effects on many non-Western societies (Brand and Wissen 2018; Lessenich 2023).

Having said this, some emancipatory modern values spreading first in Western Europe have been very influential internationally (Meyer 2010; Schmidt 2014). Early examples include the denunciation of violence at the workplace and the interdiction of child labour. Later on, modern ideas have been used to justify basic entitlements to general education and, more recently, to cater for the well-being of ‘fragile’ human beings such as children, the disabled, frail elderly people or refugees. In the twenty-first century, advanced Western societies have seen extra-efforts to respect human diversity, for instance with respect to sexual or ethnic issues. During the Covid-19 pandemic in the early 2020s, the universal right to health(care) was widely invoked to enforce strong public interventions at a global scale. Thus, worldwide, abstract convictions rooted in emancipatory modern ideas have translated into regulatory frameworks that impact upon human life in concrete terms. Although many of these frameworks often do not fully conform to what these convictions imply in theory, the above developments should not be overlooked by those who comment on recent disruptions

in global politics or within various nation-states from a dystopian perspective. Modern values did, and still do, contribute to civilising human life. In many places, they are defended by social movements or groups of actors eager to restructure human-made societal arrangements (Touraine 1973; Porpora 2014) and corresponding artefacts, sometimes transnationally (Chase-Dunn and Lerro 2016). Hence, emancipatory ideas can still unleash social power and thereby (re)shape the living conditions of human beings. This also pertains to the ideational foundations of modern welfare arrangements, as British sociologist Thomas Marshall (1950) once convincingly argued. While the institutional set-up of contemporary welfare states has emanated from multi-faceted historical dynamics (including the interplay of economic interests, evolving power relations and functional requirements of large-scale industrialisation), it cannot be understood without acknowledging the influence of basic Enlightenment concepts – most prominently, the idea of an individual human right to a self-directed life course, along with the insight that public institutions are needed to guarantee this right.

The approach underlying this book even goes further and is predicated on the assumption that many of the aforementioned commitments are building blocks of what can be labelled the vision of social modernity. While not being overly prominent in the human sciences (but see Grewal 2019, referring to Habermas), this notion provides a useful heuristic when studying the evolving character of democratic capitalism in Western Europe. Dealing with the case of Germany, sociologist Oliver Nachtwey (2018) has built on this heuristic to retrace what he viewed as regressive tendencies in the above set-up from the late 1970s onwards (see Subchapter 1.2). In his conceptualisation, these tendencies undermined previously established welfare arrangements which had shown a potential for enabling a growing number of citizens to devise a life course with some personal discretion, free of major social risks and with the prospect of status gains. The analysis that follows in this monograph makes a similar move by referring to social modernity as a scenario for the emancipatory organisation of human affairs within advanced welfare states. Democratic capitalism is conceived of as an institutional settlement in which this scenario takes shape, based on a bunch of core principles guiding the society-wide organisation of socially balanced agreements on common human affairs. As will be substantiated later in this book, Enlightenment thought has sown the seeds of this imaginary by spawning institutions and organisations that partially conform to such principles – notwithstanding the many setbacks which have occurred in modern history, including after the end of what is often called the ‘golden age’ of Western welfare states (see Esping-Andersen 1996; Hay and Wincott 2012; Ferragina 2022).

Social modernity is therefore, rather than being mere utopia, an assembly in which these institutions and organisations allow for human progress in concrete ways – despite counter-vailing forces, including dynamics in the capitalistic market economy. According to Nachtwey (2018), ‘benchmarks’ to identify such progress include extended opportunities for social upward mobility; amplified access to public education (and particularly so for lower-class citizens); a greater porosity of class boundaries (also in terms of cultural consumption); a (more extensive) public control of labour relations, the financial market and major infrastructural facilities; and, last but not least, more encompassing provisions through which citizens become ‘decommodified’, that is, (partially) independent from market forces in the sense of Esping-Andersen (1990). Arguably, welfare arrangements pursuing that direction account for the influence of (supra-individual) social factors in the shaping of human life, acknowledging that these principles can reign only if a given collectivity assumes a shared responsibility for



responding to such factors. These arrangements (can) make sure that ‘bad luck’ in the (labour) market or in terms of health conditions does not entail material deprivation. They may even breach the power structure built into the extant social fabric by enabling all citizens to make choices concerning their life course, even under difficult circumstances. Ultimately, the vision of social modernity implies universal support to human beings concerning their capacity of developing an autonomous personality; comprehensive protection against social risks, including those induced by the vicissitudes of the (capitalist market) economy; and constant access to material resources at a level close to the average of personal wealth throughout a given society.

It remains true that, under capitalism, any set of welfare arrangements would (and must) coexist with an economic system that tends to run counter to such objectives and to constrict the scope of discretion for people who lack a minimum amount of private assets. This insight is anathema to Marxist thinking and more recent scholarship focusing on the role of capital ownership in the shaping of the (late) modern world (Sum and Jessop 2013; Kessler-Harris and Vaudagna 2018; Bloom 2023). Capitalistic agency, it is observed, often clashes with emancipatory values, with this clash becoming more pronounced in recent times (see Lambert and Herod 2016; Dörre et al. 2018; Fraser and Jaeger 2018; Gonçalves and Costa 2020; Ayres 2020; Hathaway 2020; Rhodes 2022). However, it should not go unnoticed that, during the twentieth century, Western societies were trying to reconcile capitalism with democracy (see Azmanova 2020, Chapter 4). Trends towards decommodification in the above sense were backed by the universal right to vote and to form political alliances defending shared interests and values. In Western Europe, the result was a hybrid institutional settlement governed by *two* rationales (Streeck 2013: 265): ‘one operating according to ... what is revealed as merit by a “free play of market forces”, and the other following social need, or entitlement, as certified by the collective choices of democratic politics’. It is the second rationale that contains scope for orientations other than capitalistic ones when it comes to securing human welfare in contemporary Western Europe. This is also acknowledged by critical theory scholars who posit that this theory, while primarily engaged with unmasking the oppressive or hierarchical character of this hybrid settlement, has always embraced the idea that the second of the aforementioned principles challenges the capitalistic rationale by creating space for more civilised social relations (Ritsert 2014; Delanty and Harris 2022: 124). Admittedly, the institutional and organisational arrangements endemic to democratic capitalism always had multiple functions, including the justification of rule; the taming of political protest; and the development or reconstitution of human capital (ab)used by private corporations. The (critical) social sciences never tired of insisting upon this ‘hidden agenda’ of welfare programmes, belying the official ‘social policy discourse’ in various instances. And still, many of these arrangements continue to be associated with the pursuit of ambitions different to the above functions and have a potential to contribute to human progress. Hence, it is critical to examine their foundations in greater depth, before engaging with their present and future role in the assembly of twenty-first century societies.

## WHY NOW?

This book scrutinises how frameworks and settings created for the orchestration of welfare arrangements in Western Europe have developed in recent times, and what this implies for the near future. Rephrased in more dramatic terms, it explores the ‘fate of social modernity’, that

is, the prospects for arrangements which, at least partially, resonate with the idea of human progress in the sense discussed above. But why embark on this adventure right now? In the light of the turbulences mentioned at the outset, the answer seems obvious: those who think or wish that this idea continues to thrive, are faced with challenging times. The Western world seems to live in a permanent social crisis, with many disruptions exhibiting a global character (Clarke 2023). Thus, the Covid-19 pandemic of the early 2020s revealed the profound imbalances inherent in contemporary societies, breeding new social divisions and deepening pre-existing ones for many (see Lupton 2022; Natili et al. 2023). Putting aside this natural disaster, the twenty-first century started off with global banking turmoil, which had a substantial impact upon the distribution of life course opportunities among European citizens (Buendía et al. 2020). Furthermore, over the last years, these opportunities were hit by rising costs of living and a slackening economy in many countries. In addition, the growth regime endemic to modern capitalistic economies seems to produce long-term damages concerning both the ecological and biological preconditions for human existence (Rosa et al. 2017). At least, we should give credit to the fact that, even though the influence of emancipatory concepts on the history of humankind seems irrefutable, attempts to put the latter in place have often been fraught with considerable inconsistencies (Stråth and Wagner 2017).

Against this backdrop, fatalism is widespread in the new millennium (De Vries and Hoffmann 2020). Many Europeans seem to share the overarching impression that history, whatever its past trajectory, no longer will take a clear future direction. Among other things, the very idea of Western societies being driven by modern reasoning has been contested for some time now. Sweeping counter-narratives infused with an ‘end-of-history’ rhetoric (see e.g., Hughes 2011) have proliferated internationally, for example those strands of academia which defend postmodernist worldviews. Implicitly, this spirit also guides those who argue that there is nothing to contemporary society other than individuals making rational choices. Both camps would question, if not immediately dismiss, any intention to study the role of emancipatory ideas as feeding into binding supra-individual norms, contending that, in these days, such ideas are mere fantasy rather than (potential) vehicles for collective regulation upon which greater collectivities can rely. Others would suspect that retracing – let alone anticipating – the influence of these values on institutions and organisational settings in current welfare states is far too ambitious a scientific project, given the immense complexity of twenty-first century societies. While social scientific scholarship has long been engaged with reducing complexity to a few general patterns or principles to help audiences understand their ‘social world’, such an ambition is nowadays viewed as overstraining its mission (Verschraegen 2015). Many sociologists believe that advanced societies do not develop according to some overarching principles and that this complicates any effort to tease out a direction of change in social development. Consequently, given the apparent non-achievements and ambiguities in the social development of European societies, it seems hard to substantiate the claim that human progress is inherently tied to processes of modernisation.

More concretely, the recent decades have seen various trends that challenge the vision of social modernity in quite substantial ways. One of these movements has been the worldwide spread of neoliberalism from the 1980s onwards. While this term has many connotations (see Birch 2017), it generally denotes a ‘social climate change’ with considerable implications for both the institutions and organisations of democratic capitalism. The emergence of neoliberalism during the last decades of the twentieth century is often understood as

demarcating the end of ‘organized modernity’ (Stråth and Wagner 2017), concerning both the latter’s programmatic set-up and operational infrastructure. Prominent manifestations of the neoliberal agenda include reduced fiscal or social policy-based redistribution as well as a stronger influence of market relations and increased corporate power. In ideological terms, neoliberalism’s key rationale revolves around the conviction that economic freedom and market coordination should prevail or become more widespread in human interaction. This implies a strong role for private property, unfettered human rivalry (including within organisations) and a competition-friendly restructuring of non-economic sectors (concerning public utilities, healthcare, the provision of income security, etc.). Since the 1990s, popular parties and a majority of voters have often internalised the above rationale. Even in the aftermath of the financial market crisis in the late 2000s, the ‘resilience’ of neoliberal ideas was startling (Schmidt and Thatcher 2013; Crouch 2011; Fraser 2019; Peck and Theodore 2019; Laruffa 2022). The related policy mantra included the curtailment of regulation reducing an individual’s dependency on market forces and the adoption of templates for the orchestration of public service provision from the world of private business (Klenk and Pavolini 2015; Mosley and Rathgeb Smith 2018; Bode 2019a). Scholars studying movements such as austerity, retrenchment, (re)commodification or privatisation have provided ample evidence for this mantra having deeply affected the architecture of democratic capitalism throughout the Western world (Taylor-Gooby 2016; Palley 2020; Midgley 2020; Alexander and Fernandez 2021; Berry 2022), with this entailing growing social inequality and a decrease in personal autonomy for important sections of the citizenry (Morgan 2016; Tridico 2017; Kessler-Harris and Vaudagna 2018; Ferdosi 2020; Ayres 2020). Related policies are frequently seen to have hijacked part of the human progress agenda by combining ‘an expropriate, plutocratic economic program with a liberal-meritocratic politics of recognition’ (Fraser 2019: 11–12). Trumpeting market ideology and its alleged virtues for the regulation of virtually all kinds of human relations, neoliberal thinking has become imbued with an emancipatory spirit. One expression of this has been the burgeoning concept of ‘life politics’ (Giddens 1991) which, over the last two or three decades, has attracted many middle-class voters worldwide. Placing the emphasis on individual rights to identifying with a certain life-style, sexual orientation or ethnic affiliation, this concept accords well with Enlightenment thought – but, according to critics, it overshadows questions related to the distribution of social and economic welfare more broadly (Page 2016; Fraser and Jaeger 2018) and makes current societies fall short of providing collective ‘benchmarks’ for more egalitarian policies and related human progress.

It holds true that, during the last decades, neoliberal concepts have never been the only point of reference in the social policy realm. Moreover, the 2020s are often portrayed as an era of postneoliberalism as many countries have rediscovered the virtues of state intervention and public sector leadership in critical policy areas (Davies and Gane 2021). Regarding the entire social policy universe over the last decades, major cornerstones of the welfare state architecture have survived neoliberal attacks, with some welfare programmes even growing in volume (see Van Kersbergen and Vis 2014; Harris and Vaudagna 2018; Hajighasemi 2019; Kuhlmann and Blum 2020; Kerstenetzky and Pereira Guedes 2021). Nonetheless, it is hard to deny that social policies in Europe have remained (more or less) infused with ‘market ideology’ and orientations from the business world. Corporate interests have become more pervasive within the political system of Western societies (Garsten and Sörbom 2017; Hathaway 2020), even

as the imprint of these interests is remarkable when regarding the evolving infrastructure of European welfare states. All this sits uneasily with the vision of social modernity.

A related, though different, body of theory indicative of challenging times focuses on what is commonly labelled globalisation, that is, the emergence of a world order in which some strong transnational players set the tune and put pressure on public policy-making (Hay and Wincott 2012; Radice 2014; Chase-Dunn and Lerro 2016, chapter 19; Ayres 2020: 169–74; Bloom 2023). Notwithstanding recent adversities – such as the Covid-19 pandemic; the growing populist dissent against open borders; and the war in Ukraine – economic internationalisation seems to remain an inevitable course of history (Crouch 2019a; Eichengreen 2023). It is often assumed to benefit influential parts of the population worldwide and to attract the middle classes in both mature welfare states and emerging or newly advanced economies, yet it is also associated with troublesome movements of migration and rising inequalities at the national level (van der Hoeven 2023). Moreover, some readings of this movement submit that the internationalisation of corporate power impedes class struggles at the national level (Aronowitz and Roberts 2017), which implies that ideas of social modernity lack a powerful carrier – at least as long as there is no substitute for nation-based countervailing pressures.

A further challenge to these ideas to thrive are distinctive cultural developments within Western European societies during the late twentieth and early twenty-first centuries. Associated with the rise of identity politics as mentioned above, one important issue in this debate is individualisation (Berman 1983; Fevre 2016; Siza 2022). To be sure, important strands of the human sciences (including critical theory) stress that this trend has been a central precondition for modernity to flourish and to create institutions in the public interest (Genov 2018). As the fulcrum of modern society, it is argued, individuals voluntarily adhere to abstract social codes precisely because these enable them to make autonomous decisions and cultivate an independent personality. However, in the eyes of many sociologists, recent forms of individualistic reasoning and egocentric behaviour tend to impede arrangements by which society as a whole creates socially binding norms, including in the process of designing public institutions. From Baudrillard to Bauman, postmodern thinkers claim that advanced Western societies shift the responsibility for the organisation of social life to the mere individual, nurturing a mentality of ‘anything goes’ through which nothing is sacred and collective values become arbitrary. A milder version of this tenet is contained in theories of reflexive modernity according to which individuals feel incited, and often urged, to design their life course in the absence of collective reference points (Archer 2014). In this reading, modern subjects must permanently revise their life trajectory within a jungle of seemingly unlimited opportunities and ungovernable risks, with little help from elsewhere. This accords well with a variety of social theory stressing the mutually reinforcing encounter of individualism and capitalism (Sum and Jessop 2013; Bauman 2011; Rendueles 2017). Reminiscent of early critical theory (e.g., Adorno), this reading implies that, in the assemblage of advanced Western societies, more variegated ‘life choices’ meet new dynamics in the wider economy. In a context of unleashed capitalism, so the argument runs, the modern individual is transformed into an atomistic consumer who abandons any ambition to engage with collective projects. The strong influence of commercial messages which ‘seduce’ the mass population is observed to elicit consumerist excesses. While there is certainly more to contemporary human life than shopping and consuming, the liaison between individualism and commercialisation is deeply entrenched in what this book refers to as post-industrial configuration.

A different narrative pointing to the intricacies of the modern age is dealing with the ongoing spread of rationalism in Western history. This movement, endorsed by a secular trend towards quantification and measurement in social life (Mennicken and Espeland 2019), is often viewed to be rooted in the economic system but affects non-economic spheres of human life as well. Bromley and Meyer (2017) comment that, due to this trend, culminating in the twenty-first century, collective arrangements at society level can only rest on easy-to-grasp characteristics of individuals. In essence, they submit, individual subjects are valued in no more than two roles – as a holder of personal rights and as a productive economic agent. This implies that references to individual rationality superimpose more community-based forms of sense-making. Recent developments around the globe seem to corroborate this claim, notwithstanding the pending conflicts between advanced societies and archaic, more collectivistic societies (for instance in the Islamic world). Again, this looks like bad news to those sympathetic to the vision of social modernity. While a rationalised ‘world society’ (Meyer et al. 2010) does not exclude the blossoming of institutions drawing on the legacy of Enlightenment (e.g., with respect to individual human rights), the above reasoning suggests that there is little place for arrangements based on intergroup solidarities or collective commitments to ‘sacred’ values, both of which were drivers of that vision during the twentieth century.

A further cultural challenge to this vision has surfaced with the proliferation of what is commonly labelled political authoritarianism or right-wing populism (Wiatr 2019; Bloom 2023). This movement, while sitting uneasily with the aforementioned observation of ‘rationalistic’ globalisation, collides equally with Enlightenment concepts – and this is not only because political authoritarianism proves to be anti-democratic. A key issue in this debate is the premise of cultural backlash (Norris and Inglehart 2019; for a critical view: Iversen and Soskice 2019, chapter 5) – which, in rough terms, implies that, during the last decades, larger sections of the Western population have come to display authoritarian sentiments because they are no longer willing, or able, to keep up with an accelerated diffusion of individualistic values which, on their part, have become ‘radicalised’ in recent times. This especially pertains to individual identity issues (for instance, sexual orientations, gender roles, life-styles). The result is, among other things, opposition to policy agendas addressing social equity in these particular dimensions. At the same time, the above sentiments connect with an ideology of nativism (Mudde 2007), which implies social entitlements to be granted along ethnic lines. Indeed, right-wing populists in Western Europe often claim more comprehensive welfare arrangements for ‘hard-working’ national insiders (Chueri 2022) – and thereby defend ‘a nativist version of the old social contract’ that once was fundamental to the blossoming of democratic capitalism (Iversen and Soskice 2019: 226). Their recent political success reflects a growing reluctance among Europeans to subscribe to a cosmopolitan version of the human rights agenda as a cornerstone of the vision of social modernity.

At the same time, however, there are good reasons to assume that this vision has not yet passed away. Thus, many contemporary Europeans still seem aware, to some degree, of a collective destiny. A case in point is the reaction to the Covid-19 pandemic, which threatened not only millions of lives but also the economic well-being of various populations and even the functioning of entire national economies (Moreira and Béland 2022). The reaction to this crisis in Western Europe was more resolute than would have been expected at earlier stages of modernity. Based on the widely shared view that a given society is collectively responsible for ensuring personal well-being in this very context, this part of the world saw enormous public

efforts to buffer economic shocks entailed by the pandemic and guarantee appropriate sanitary protection as well as healthcare to virtually all citizens and to the weakest in the first instance. Faced with the above experience, many Europeans also questioned past reforms causing welfare retrenchment or fragmentation in the human service sector and came to view these reforms as a barrier to public health and social well-being.

Even prior to the Covid-19 pandemic, some trends could have made us more optimistic about the future of civilised humanity more generally, at least when giving credence to studies that show growing economic welfare, decreasing human violence and improving health worldwide. Thus, Canadian psychologist Steven Pinker (2018), in a ‘manifesto’ titled tellingly ‘enlightenment now’, collated evidence suggesting that humankind is still going to make the world a better place – at least when using criteria rooted in modern thinking and scientific rationality. According to his assessment, past attempts to achieve a deliberative and (more) socially balanced organisation of human affairs within complex societies were quite fruitful. Likewise, survey data (published prior to the Covid-19 pandemic) seemed to indicate that Western citizens were never more satisfied with their own lives than in the early twenty-first century (Schröder 2018). Opinion polls covering mainland Europe, Scandinavia and parts of the South Mediterranean showed that, in essence, a majority of citizens continued to subscribe to values established during the ‘golden age’ of democratic capitalism, with ‘a pro-welfare state rhetoric ... still dominating in most countries’ (Van Kersbergen and Vis 2014: 203; see also Roosma 2021). This aligns with a flourishing body of literature on the thriving human rights discourse worldwide (De Schutter 2013; Leisering et al. 2015; Moyn 2018). Taking all this into account, those aspects of Enlightenment thought which (can) contribute to building a more civilised society are unlikely to have become outmoded in twenty-first century Europe.

More fundamentally, European societies seem to show *resilience*. Their history has seen numerous social movements insisting on respect for modern values, and these movements have turned more cosmopolitan in recent times, with a strong focus on ‘green issues’ and humanitarian action (Heinlein et al. 2012; Cohen et al. 2017; De Moor et al. 2021; Sevelsted and Toubøl 2023). As it seems, many Europeans do not succumb to the temptation of fatalism despite an increasingly complex world, notwithstanding the fact that (political or corporate) commitments to make these ideas matter around the globe have often been ‘cheap talk’. In many cases, emancipatory social movements have become transformed into independent non-profit organisations and influential players in politics (Lang 2013; Almog-Bar and Schmid 2014), campaigning for the instigation of novel regulatory frameworks, including in areas of organised welfare provision. Typical examples comprise the international disability rights convention, a global agreement on children’s rights and initiatives to make medical progress (e.g., vaccines and drugs) available to people in the Global South. This ‘global civil society’ (Kumar 2007) has also pushed political efforts to introduce a new international tax floor to make welfare states solvent (again). All this implies that, at least to some extent, elements contained in the vision of social modernity have had an impact in recent times.

Overall, we are left with a confusing picture. Arguably, Western European societies (and other parts of the world) have seen tendencies that seem to impede social modernisation in various ways. Old and new social divisions, cultural dissent and powerful political opponents combine to create strong stumbling blocks on the path to human progress. At the same time, ideas contained in this vision have survived and remain a reference point within public debate internationally. From this vantage point, there is no simple answer to the question about the

fate of social modernity. Entering the second quarter of the twenty-first century, both a more holistic perspective and down-to-earth assessments are required to disentangle the contradictory dynamics underway.

## AND HOW?

As explained earlier, the principal aim of this monograph consists of unpacking the reality of social modernity in the universe of organised welfare provision and gauging the prospects of this universe in the case of Western Europe and within a context of ongoing social change. But how can this be achieved? What is sought is a conceptual approach by which core trends in this realm can be captured, an idea about appropriate observational units, and a research strategy to make the investigation manageable. As for the conceptual approach, we can build on both critical theory and the scholarship dealing with the institutional – as well as organisational – foundations of democratic capitalism; there is no need to start from scratch here, given the long history of social research and theory building that revolves around these issues. With regard to the observational units, established regulatory norms – that is, welfare state devices – and organisational settings putting such norms into practice lend themselves to capturing relevant conditions and trends. Concerning the research strategy, valuable insights into the structure and development of organised welfare provision can be gained from both re-examining cross-national evidence contained in available field or case studies and interpreting such evidence in the light of specific sets of theory-based categories.

Let us consider this agenda in greater detail. The overarching conceptual approach underlying this book borrows from the idea that modernity is driven by a blend of dynamics which feed into the hybrid set-up of democratic (welfare) capitalism. This perspective, spelled out more systematically in the theory section of this book (Part I), is consistent with the observation that, since the unfolding of capitalism as an economic order, non-economic values co-exist with that order of which some have an emancipatory character. While power struggles between stakeholders of entrenched institutions are often fuelled by conflicting material interests, they can also be infused with normative orientations which enable human collectivities to interpret and fashion their common social world. Among other things, this process may feed into specific welfare arrangements which become constantly actualised through sense-making processes (Bode 2008a). Hence the character and development of democratic capitalism must be investigated with an eye on the latter's cultural underpinnings (for similar arguments, see Sum and Jessop 2013). In terms of observational units, it can be assumed that regulatory frameworks 'institutionalise' values contained in a society's cultural repertoire and, by extension, in the imaginary of social modernity. When studying the fate of the latter, it is crucial to capture the evolving role that 'sedimented' normative orientations and underlying emancipatory ideas (in the sense discussed above) are playing for these frameworks. A second observational unit to consider are those entities that are organising welfare provision in material terms. Attached to distinctive bodies and agencies, these 'makers' of welfare contribute to making a (potential) difference to what the (capitalistic) economy offers in terms of social opportunities although they impact upon the living conditions of target groups in complex ways.

Notably, the inspection of both the institutional and organisational character of these arrangements conforms to major traditions of sociological inquiry – and is also consonant with more recent approaches to social change in highly developed societies (Scott 2014;

Hotho and Saka-Helmhout 2017; Furusten 2023). It should be borne in mind that, concerning the Western world, the institutional foundations of organised welfare provision do not only materialise in legal acts but also in other types of social regulation, including professional norms, the architecture of regulatory bodies or public administration models. All these devices carry social meaning and reflect distinctive regulatory ideas (Gibson and vom Lehn 2018). In areas such as healthcare, social work or support to long-term jobseekers, these ideas guide occupational groups in their evaluative reasoning. Moreover, these groups are faced with what external stakeholders deem as legitimate or taken-for-granted. While it may not always be easy to uncover these more ‘hidden’ underpinnings of contemporary welfare arrangements, the analysis of the latter cannot be undertaken without a sideways glance at these less formalised patterns of institutional regulation.

At the same time, organisations are major catalysts of welfare state government. This can be understood in several respects. First of all, in Western history, welfare arrangements have often emerged through the collective action of social movements, trade unions or public pressure groups (Schmitter 2008 or Lang 2013). On various occasions, these organised social forces made public authorities prompt, accompany or refract the making of norms related to the above arrangements. Secondly, organisations are levers of social intervention and exhibit special characteristics in this role (for illustrations, see: Hasenfeld 2010). More generally, they may ‘have a direct impact on society’ (Besio et al. 2020: 414) and be(come) a source of ‘efforts to change social systems’, including their own ‘roles and responsibilities ... in a [given] societal context’ (Mair and Seelos 2021: 3). Accordingly, a key tenet of this book is that the fate of social modernity is influenced considerably by collective agency deployed within ‘specialised’ organisational settings and sectors. Admittedly the role of ‘welfare-providing’ entities – henceforth labelled welfare organisations – is anything but clear-cut. On the one hand, undertakings in this universe embody those ambiguities that are endemic to the assemblage of modernity including, for instance, bureaucratic stasis or oppressive human relations (see e.g., Powell and Hewitt 2002: 118–39). On the other hand, regarding highly developed Western societies, agencies entrusted with the administration or delivery of ‘welfare’ have shown a potential to endorse and even amend arrangements in line with socially progressive agendas. Despite a growing scholarly interest in related dynamics throughout this universe (see e.g., Binder 2007; Martin et al. 2017; Mik-Meyer 2018; Jacobsson et al. 2020), the ‘organisational factor’ deserves more scrupulous attention when exploring welfare arrangements now and in the future. Thirdly, an analysis of the above dynamics would be incomplete if it were only confined to an inspection of the mere welfare state. Certainly, statutory bodies are of utmost importance for these arrangements. However, internationally, such arrangements involve private corporations as well as different types of non-profit (or civil society) organisations, each characterised by special constituencies. Concerning the organisational factor, one must also account for ‘street level’ discretion and the relative autonomy of specialised professions within relevant settings. Indeed, rather than serving as a mere transmission belt of governments, the ‘makers’ of welfare frequently operate under conditions that provide them with leeway for creative agency.

Importantly, in any study concerned with organised welfare provision, change in this particular universe – both at institutional and organisational level – should be a distinctive object of enquiry. Such change often materialises in structural shifts. To wit, in many twenty-first century welfare states, novel types of organisations (such as public–private hybrids) connect



with institutional innovation (such as public payments into private retirement schemes) to transform entrenched patterns of old age provision. To map ongoing change and make assumptions about its repercussions, only a combined analysis of what is going on at both institutional and organisational level conveys the complete picture. For instance, public administration reforms may strengthen the role of managers while reducing the discretion of frontline workers. At the same time, collective agency deployed within welfare organisations may impact upon outcomes or the very institutional design of social policies. This, for example, pertains to civil society groups enforcing adjustments to welfare programmes for disabled people. To understand movements of change in this universe, knowledge about developments in the environment of relevant institutions and organisations, that is, in the economic, political and cultural spheres, appears crucial as well.

To assess the ample and dynamic range of factors in play, we need a focused research strategy. The challenge is considerable, especially when adopting an international perspective. Concerning this latter aspect, a pragmatic way forward consists of concentrating on cross-national patterns or tendencies while keeping an eye on major archetypes of what is referred to as ‘welfare regimes’ throughout the wider scholarship (Esping-Andersen 1990, 1996; Deeming 2017). Accordingly, in this book, the focus lies on ‘pan-European’ characteristics of the welfare arrangements under study, along with more detailed portrayals of some emblematic subfields of organised welfare provision which are undertaken by examining the cases of England, Germany, Norway and Italy. To be sure, this qualitative and pan-European approach impedes claims about the gradual differences that have arisen between national models, as well as a more fine-grained, numeric analysis of cross-national data which would attempt to explain the ‘causes’ behind these differences. However, the above focus, circumventing the many intricacies of a more decontextualised comparative assessment based on numbers or symbols (for instance mere labels of institutions), reveals the most essential patterns concerning the development of European welfare states. The cross-national perspective is justified not only because the investigated phenomena are entrenched in a ‘European heritage characterized by forms of commonality’ (Delanty 2019: XXXVI), but also in the light of the creeping (albeit imperfect) convergence of major welfare state institutions and organisations within contemporary Western Europe (Ferdosi 2020; Scharpf 2021; Ferragina and Filetti 2022; Scruggs and Ramalho Tafoya 2022). Thus, given the research interest presented above, we can learn most when capturing commonalities in context, that is, by illuminating similar facets and dynamics under (more or less) dissimilar circumstances. This also holds for the analysis of collective agency within the organisational settlement of contemporary welfare states.

It should be noted that the findings inferred from such a cross-national research design may also be of interest to those studying organised welfare provision in other parts of the world. True, a focus on Western Europe implies that developments in Northern America (the United States and Canada) are only addressed implicitly, as many patterns discussed throughout emerged in America before transferring to Western Europe (Clarke and Newman 2012). Furthermore, the special case of Eastern Europe does not receive particular attention either. This may appear unfortunate, given the recent tendency of some ex-communist nation-states to become ‘decoupled’ from the Western tradition of democratic capitalism – even though other dynamics in this part of Europe still resemble those prominent in Western countries (see Kuitto 2016; Bode 2017a). More generally, it goes without saying that commonalities

in the development of organised welfare provision within the Western world do not inform us about the fate of social modernity at a global scale. In fact, the somewhat naïve narrative of mid-twentieth century modernisation theory – which still resonates today – has been heavily criticised (see Subchapter 1.3). It insinuates that human communities worldwide would develop into a similar settlement, featuring a ‘free market’ (capitalistic) economy, representative democracy, secularism and the rule of (civil) law or legal rationalism. In some respects, this trend did occur as a result of colonialism, yet it seems that many cultural orientations prominent in occidental societies have not pervaded the mindset of non-Western populations. What is more, recent dynamics such as the Chinese road to capitalism or the (partial) absence of constitutional legality in many parts of Latin America belie the above narrative, not to mention the resilience of pre-modern configurations in the Arab world and across larger parts of Africa. Consistent with theoretical accounts of modernity not following a single path (see e.g., Eisenstadt 2000), this experience should warn us against overly simplistic generalisation when it comes to identifying international trends of social development. However, Western institutions and organisations thus far had a strong influence on these trends (see Delanty 2019). In important respects, moreover, social policy-making has become transnational (Öktem 2020). Non-Western countries strongly involved in international trade often exhibit institutional frameworks and organisational models imported from the Occident, including social security schemes or professionalised human service agencies (see e.g., Bode and Culebro 2018). Hence, at least to some extent, an inspection of the evolving cornerstones of welfare arrangements within Western Europe may contribute to a better understanding of dynamics elsewhere in the world.

The research strategy for the investigation in this book must remain selective in yet another respect. Despite this book’s ambition to illuminate the fate of social modernity more generally, a ‘filter’ is required to provide critical evidence from within the ‘jungle’ of welfare arrangements across Europe. An in-depth analysis of these arrangements presupposes a focus on a limited number of social policy areas and welfare sectors which, considering the size of target groups and the magnitude of addressed social needs, nonetheless have a strong impact on twenty-first century societies. Therefore, it appears fruitful to examine devices and settings related to key stages of the human life course, namely arrangements for children, adults of working age and elderly people. While this roadmap can occasionally be found elsewhere in the welfare state literature (see e.g., Birnbaum et al. 2017), the strategy chosen for this book provides us with a particularly wide spectrum of regulatory norms (concerning both social protection schemes and human service provision), as well as with deeper insights into organisational dynamics throughout the fields under scrutiny. The analysis is enriched further by in-depth studies into some specific terrains, which, after having long appeared to belong to the periphery of welfare state architectures, can currently be deemed to have become critical fields for social modernisation, namely, child protection, work (re-)integration addressing adults and personal care for elderly people.

Once we have demarcated the areas to explore, the question arises of how to gain a comprehensive picture of the groundwork of these architectures in terms of institutional and organisational characteristics. A promising way to scrutinise (evolving) regulatory frameworks across the above fields consists of reviewing evidence from available scientific studies, preferably work addressing an international readership (and hence, specifically, material published in the English language). The precise methodological approach to this endeavour is depicted later in

this book. In a nutshell, it builds on observations concerning the (changing) internal logic of those programmes and norms by which Western European welfare states intend (or pretend) to impact upon the well-being of their citizens. Such 'institutional analysis' (see Campbell and Pedersen 2001) also helps ascertain achievements and setbacks in social development more generally. As for the analysis of dynamics in organisational settings, (multiple) case studies (Stake 2006) provide in-depth knowledge about the engine rooms of the above welfare states. Broader insights can be drawn from 'quasi'-scoping reviews which are condensed with the help of concepts prominent in organisational theory (more detailed information on this is provided later in this book). For both the organisational and the institutional level, relevant data can be interpreted by relying on those principles which this study deems fundamental to the vision of social modernity, that is, on an analytical grid construed with an interest in a parsimonious investigation of complex facts and developments.

Importantly, to understand past and ongoing dynamics, knowledge about the evolving environment of the above frameworks and settings appears indispensable. This is because developments occurring on the 'backstage' of organised welfare provision may alter the 'rules of the game' at play when societies (re)shape the respective arrangements. Related observations should therefore be read through the prism of social change, in order to contextualise institutional and organisational dynamics in the light of some higher-level trends. This prism can be inferred from the wider macro-sociological literature dealing with, among other things, an unleashed capitalism, rising individualism, intensified ethnic pluralism or disruptive collective action in politics. Consequently, this book contains a brief overview of the related literature and includes findings on social change in Western Europe in the 'discussion part' of its core sections.

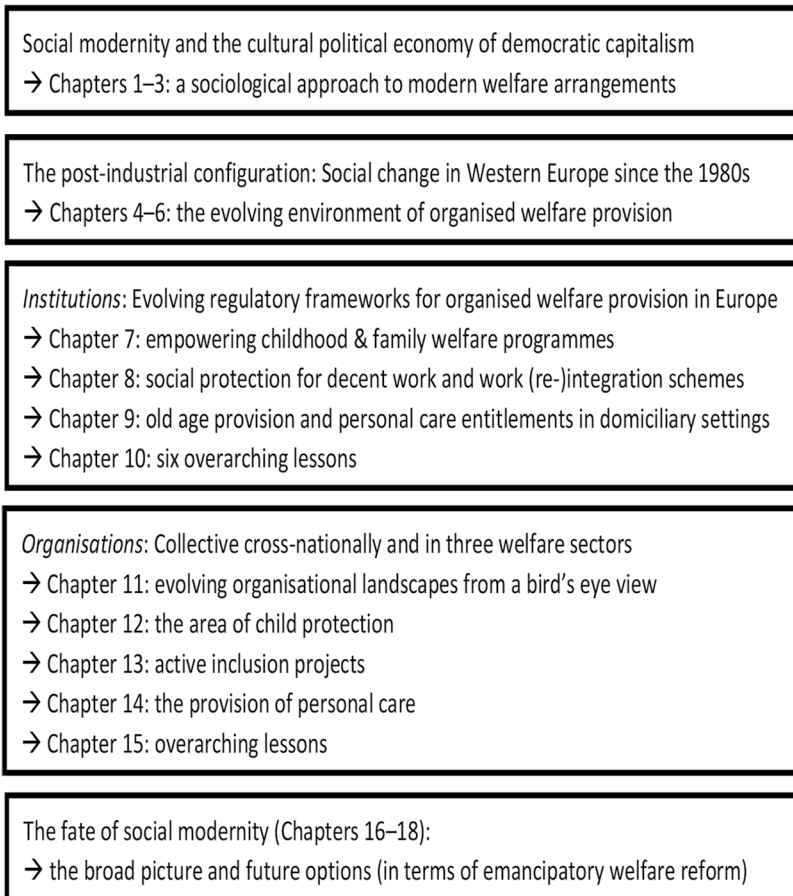
Finally, to gauge the wider prospects of social modernity, we need a 'bridge' between developments in the recent past and what may be possible in the future. This bridge can be built in two steps. First, one needs to make sense of contradictory observations by adopting the lens of what the final section of this book refers to as 'diagnostic realism' (see Brülde 2005). Taking stock of institutional and organisational dynamics in Western European welfare states since the 1980s, we can carve out a middle ground between, first, assessments drawing a bleak picture regarding the scope for human progress and, second, sanguine narratives which insinuate that – driven by innovative forces endemic to post-industrial capitalism – Western societies in their current condition are about to become a better place for all. Secondly, when it comes to inferring consistent policy implications from this synthesis and pondering future options, a promising way forward consists of critically discussing extant concepts for welfare reform in the light of this synthesis and with an eye on their potential contribution to human progress. Both past developments and prominent reform concepts can be evaluated by taking the principles of social modernity as a yardstick. Concepts for welfare reforms emanate from the wider social policy debate and can be put to a 'test' regarding their fit with the above principles. At the end, we need to account for factors which currently impede 'truly' progressive concepts from attracting mass support – including the movements of social change occurring on the 'backstage' of organised welfare provision – and to reflect about what could invalidate those factors. All this provides us with a realistic outlook on the fate of social modernity in the twenty-first century.

## THE PLAN OF THE BOOK

This book falls into five parts including one background section and a final set of chapters which contain an interpretation of the most relevant findings as well as a discussion of policy implications in the above sense (see Figure I.1). The book's core sections comprise: (a) reflections on the theory of social modernity and principles inherent in the it, feeding into the analytical grid for assessing the emancipatory potential of twenty-first century welfare states; (b) an interpretative synthesis of institutional characteristics and developments in that universe as far as Western Europe is concerned; and (c) a critical assessment of the evolving 'organisational factor' in the provision of relevant welfare state benefits and services throughout this territory. The background section (Part II) provides a brief overview of recent movements of social change in that territory, in order to facilitate both the understanding of prominent trends in the areas under study and the discussion of options for future welfare reform. Importantly, the overall design of this comprehensive monograph is 'modular', meaning that all book sections, though being interconnected, stand on their own. Thus, readers may be (particularly) interested in only one of the sections or only one of the fields under scrutiny and skip other parts of the study while finding key lessons at the end of the Parts III and IV (which form the investigative core of this book), as well as a more abstract conceptualisation of these lessons in the synopsis at the end. Hence, the overarching message of the book can be grasped without having read all those (sub)chapters which document the underlying observations in a more detailed, contextualised and nuanced manner.

Following this introduction, Part I of this book presents the theoretical anchorage of the study, starting by examining the concept of modernity and the inherent promise of 'balanced agreements' for governing Western societies – including elements contained in a more radical, emancipatory vision based on this concept (that is, social modernity, see above) and observations of related historical dynamics. An important message at this point is that prominent strands of theory, invoking the mixed experience with Western history, view modernity as a double-edged sword, given the many adversities associated with ambitions to ensure human progress. Apparently, the vision of social modernity has had a certain influence during that history but seems to be heading towards an uncertain future. Hence the analysis in Chapter 1 leaves open questions concerning the present and future role of the above ambitions.

Chapter 2 narrows the focus for responding to these questions. It starts by discussing the cultural foundations of twentieth and twenty-first century democratic capitalism, understanding the latter as an institutional settlement based on a social compromise imbued with certain moral values. This settlement is viewed to mitigate some of the tensions emanating from the encounter of economic power and political rights, notwithstanding the many challenges outlined above. As such, the settlement reflects the complex foundations of modern welfare arrangements since it opens a space for the vision of social modernity to thrive while simultaneously placing a severe strain upon it. Accordingly, the welfare state scholarship is sending inconsistent messages concerning the character of recent transformations in this universe. These observations, calling for a scrupulous examination of past and ongoing dynamics, lay the ground for building the analytical grid mentioned above. This grid is predicated on the assumption that some contemporary welfare arrangements – that is, benefit schemes, human service systems or protective legislation – have been impregnated with emancipatory ideas and elements contained in the vision of social modernity. The grid comprises three overarching



*Figure 1.1*      *Concept of the book*

normative principles which are entwined with generic values (human dignity, social justice and personal self-direction). These values undergird operational concepts which can inspire concrete policies and welfare programmes. One of these concepts implies that young people should grow up ‘appropriately’ and with shelter from ‘unacceptable’ harm, to ensure an empowering childhood. A further one nourishes expectations addressing a key interest of modern adults, namely the protection from deleterious labour conditions and the inspiration to undertake decent work. In addition, there is the imaginary of a safe later life as a concept which sustains action against extreme forms of poverty after retirement as well as initiatives to provide frail elderly people with extra-familial, long-term care.

Chapter 3 of Part I contains reflections about the (potential) levers of related commitments, arguing that institutions and organisations can be major ‘drivers’ of social modernity. Drawing on influential theoretical approaches to governmental action, the nature of ‘organised’ civil society and the role of modern professions, this chapter also foregrounds potential pitfalls

of modern institutions and organisations (according to the wider scholarship). Moreover, it spells out why social dynamics in the environment of these institutions and organisations may affect the influence of the previously mentioned normative principles. Thereafter, Chapter 3 elaborates in greater detail on how to study social modernity empirically and beyond national boundaries, presenting the overarching rationale and ‘technology’ of the analysis undertaken throughout this monograph – that is, the association with critical realism, the instruments used to assess institutional artefacts cross-nationally, the methodological approach to inspecting collective agency at the organisation level, and, finally, the ways chosen to access options for future developments.

Part II of this book, conceptualised as a ‘background analysis’ in the above sense, illuminates the ‘backstage’ of those regulatory frameworks and organisational settings which the subsequent parts of the book will (re-)examine in greater depth. Drawing on recent pan-European macro-sociological studies dealing with the front lines of social change throughout the last decades, it briefly delineates societal developments that cut across the above frameworks and settings. Among other things, these developments include shifts in labour market participation, political life, private relationships, as well as tensions endemic to novel forms of individualism and ethnic pluralism. On this basis, this book section portrays what this book conceives of as post-industrial configuration, arguing that, in the new millennium, this configuration sets a new scene for welfare arrangements across Western European societies.

Devised as a first major pillar of the analytical investigation undertaken in this book, Part III delves into the evolving regulation of organised welfare provision and characterises institutional developments across a period starting in the 1980s and ending in the early 2020s. The section’s overall ambition consists of assessing the nature of extant regulatory frameworks and the directions of change in the remaking of the latter. This is based upon a broad synthesis of available policy and field studies which allows for an overarching evaluation of advancements and setbacks in welfare state development, through the lens of those principles which this book associates with the vision of (social) modernity. The analysis centres on the three life course stages as mentioned above and includes a mix of general assessments of cross-national developments and a more detailed review of provisions for three selected sub-fields.

The investigation starts by collating evidence on welfare benefits and services targeting the youngest generation, with a closer inspection undertaken of the subfield of child protection and its recent development in four jurisdictions (Norway, Germany, England, Italy), bearing in mind that related activities are emblematic of post-industrial agendas to ensure an empowering childhood for all. The analysis continues by exploring frameworks related to the issue of ‘decent work’. A cross-national assessment of regulatory frameworks concerning employment protection writ large (notably, labour law and income replacement schemes, health-related rehabilitation) is followed by a more detailed portrayal of work re-integration programmes and active inclusion projects in four nations, as this subfield proves a formidable indicator of what a ‘post-industrial’ welfare state offers its citizens in the event of work-related hardship. Concerning the third area under study – namely, institutions relevant to a safe later life – the investigation combines a general overview of evolving pension and long-term care systems with a more detailed inspection of the dynamic subfield of personal care services in the homes of frail elderly people (that is, support beyond nursing and medical treatment), again with a focus on the four countries mentioned earlier. Part III ends with a discussion of the lessons learnt thus far with respect to the nexus of institutional and social change, on the one hand,

and the evolving nature of the portrayed devices in the light of the analytical grid developed in Part I, on the other.

The next core section (Part IV) and second major pillar of this study addresses the ‘makers’ of welfare – more precisely, the collective agency in selected settings of organised welfare provision. Drawing on a large array of literature, it starts off with a general overview of the evolving organisational landscapes across welfare sectors and national borders. Thereafter, the three sub-fields mentioned above are subject to closer scrutiny by means of a focus on distinctive organisational dynamics. Theory-based categories are used to structure condensed scoping reviews covering various parts of Western Europe. The compilation of relevant research findings (including from studies conducted by the author of this book) helps capture those dynamics which constrict or endorse the influence of principles of social modernity on the welfare sectors under study. As regards child empowerment, the observational unit is the set of agencies involved in child protection work. Concerning decent work conditions, the organisations under close inspection include various entities responsible for running active inclusion programmes. Meanwhile, regarding later life, the analysis covers organisations involved in the provision of personal (home) care. Informed by the evidence on social change collated in Part II, the discussion of all findings – which is again encapsulated in six major lessons – illuminates the various roles performed by the ‘makers’ of welfare, including when it comes to realigning activities in tune with the vision of social modernity.

The concluding part (V) of this book provides a synoptic view on the fate of social modernity in Western Europe. Chapter 16 recapitulates the ‘state of things’ concerning those institutions and organisations which form the backbone of welfare states in that world region, arguing that ‘diagnostic realism’ (see above) enables us to provide a nuanced assessment of past developments from the perspective of human progress. A key message here is that social modernity seems alive, in demand, and feasible in many instances. Internationally, emancipatory promises still play a role when considering the nature of extant frameworks, ongoing institutional change and the protective or even creative practice of collective actors involved in organised welfare provision. Recent policy initiatives, responding to concerns shared by greater sections of the European population, seem to follow the spirit of social modernity at least to some extent even as collective agency within experienced organisations has largely contributed to nourish this spirit. Instruments developed at earlier stages of democratic capitalism seem to remain attractive and even travel across borders, given their influence on EU latecomers as well as many other countries of the globe. From this vantage point, much seems feasible concerning ambitions to make the principles of social modernity more relevant.

This is not, however, the whole story. The penultimate chapter of this book reminds us of the fact that many commitments derived from the vision of social modernity have gone unheard in recent decades, implying that human progress has stalled in many places. This part of the synopsis recapitulates the various frictions in the development of European welfare states over the last decades – both at the institutional and the organisational level. Poverty rates have overall increased, the scope for personal self-direction has been curtailed in important respects, the ‘market rationale’ trumps social justice values in many instances and managerialism in public administration settings – meaning a blend of business-like steering tools and faith put into numeric accountability – has put strain on need-focused professional action in numerous areas of organised welfare provision. In analytical terms, past and ongoing dynamics are encapsulated in three paradigms – dismantlement, disorganisation and disso-

ciation. These paradigms help elucidate both the complex mechanisms at play here and the driving forces behind them. A major conclusion is that, regarding the state of affairs in the early twenty-first century, the agenda of social modernity turns out to be more selective and bifurcated. While the transformation of the capitalistic economy has played an important role in this process, socio-cultural dynamics on the ‘backstage’ of organised welfare provision do not accommodate emancipatory projects either – for instance, the asymmetric development of civil society, the spread of egocentric individualism or the rise of political authoritarianism. Such trends – which tend to paralyse ‘socially progressive’ collective action and entail erratic reactions to growing cultural complexity – make it harder to evoke and pursue those welfare state goals which are inspired by emancipatory ideas and address larger constituencies in Western nation-states (and beyond).

This is widely consistent with predictions from critical theory, which alerts us to the tendency that, in the aftermath of ‘organised modernity’, democratic capitalism renders human progress capricious and volatile in many instances. However, critical realism helps us to see that there nevertheless is a potential for these ideas to matter in future times – not least because emancipatory elements continue to be ingrained in current institutions and organisations. Against this backdrop, the final chapter of the book delineates possible options for the years to come. It starts by maintaining that, given the evidence presented in this book, there are no reasons for trumpeting the end of history. Cultural concepts and related devices that undergird processes of social modernisation appear robust, even as various communities develop ideas to reinvent ‘troubled’ institutions and organisations. That said, the first subchapter (18.1) argues that some concepts for welfare reform that have gained traction in recent years appear insufficient when taking the principles of social modernity as a yardstick for human progress – for instance, the much-lauded social investment approach or initiatives based on a naïve confidence in social businesses. Subchapter 18.2 then elaborates on more auspicious approaches, among which the concept of ‘universal basic services’ or the idea of novel ‘pre-distribution policies’, as well as their critical underpinnings – such as enhanced trust in the capabilities of an active and responsive state (which cannot do everything, but could achieve far more than is currently the case) or (more) reliable institutional support for an independent non-profit sector engaged in both political advocacy and comprehensive service delivery. The final chapter discusses the contextual preconditions for these ‘truly progressive’ welfare reforms to thrive, namely, processes of historical learning – meaning a rediscovery of critical prerequisites of social modernisation in the past – as well as more substantial changes in welfare state-related belief systems, providing dynamics of social modernisation with an innovative impetus. In concrete terms, these preconditions include a new organisation of the waged labour force, less enthusiasm for both ‘market solutions’ and managerialism among wider sections of the European middle classes, and transcended identity boundaries in the social fabric of the post-industrial configuration. The book ends with an encouraging perspective, positing that while the fate of social modernity is insecure in the immediate future, European societies have a rich repertoire of devices and ‘makers’ at their disposal to sustain and revive the related vision on a greater scale.



# PART I

## Social modernity – a conceptual approach

### OVERVIEW

This book section charts the conceptual approach guiding the subsequent investigation, placing the focus on the theory of (social) modernity. The first subchapter discusses the ‘basics’ of modern thought and inherent promises to establish ‘balanced agreements’ with a concern for human progress, notwithstanding the many adversities associated with this project. This includes a description of the imaginary of ‘social modernity’ as a vision inspired by these promises. The subchapter then turns to bodies of social theory which, reviewing the (recent) history of humankind, depict modernisation as a double-edged sword concerning its influence on human progress.

In the second subchapter, the focus is narrowed down to the chemistry of democratic capitalism and the dynamics of modern welfare states. Drawing on the related scholarship, democratic capitalism is portrayed as a social compromise which mitigates some of the tensions inherent in the interplay of economic liberalism and emancipatory Enlightenment thought. This subchapter also highlights differences between a political economy and a culturalist approach to understanding the evolving dynamics of modern welfare states, arguing that both help to capture basic characteristics of the latter in the Western world. Moreover, it engages with the wider literature on recent changes in these welfare states – which, it is observed, conveys an unclear picture concerning the developments underway. This discussion feeds into an analytical grid to dig deeper in this respect. This grid comprises three overarching normative principles and related values (human dignity, social justice and personal self-direction) – all highly relevant to the life course of contemporary citizens – and will be used as an analytical lens for characterising welfare arrangements in Western Europe.

The third subchapter considers the (potential) levers of welfare state commitments. Both institutions and organisations are understood as major ‘drivers’ of social modernity, according to influential theoretical approaches to governmental action, the nature of ‘organised’ civil society and the role of modern professions. The subchapter also deals with potential pitfalls of modern institutions and organisations, before discussing the potential influence of social dynamics in their environment. The final part elaborates on options to study social modernity in concrete terms and beyond national boundaries, in order to develop a pragmatic concept for grasping the fate of prominent welfare arrangements. This discussion comprises a presentation of the overarching rationale of the analysis undertaken in the subsequent book sections, including a discussion about the value added by a critical realist perspective, the instruments used to assess institutional artefacts, the methodological approach to inspecting collective agency at the organisation level, and, finally, ways to access options for future developments.

# 1. What is social modernity?

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## 1.1 MODERN THOUGHT AND SOCIAL DEVELOPMENT

In Western sociology, modernity and modernisation have long been seminal concepts. Notwithstanding their short revival after the end of communism, however, the interest in the related body of theory has lost momentum over the last 50 years or so. Today, few sociologists would consider the notion of modernity as a lynchpin of twenty-first century social theory. Rather, this notion evokes an imaginary that is associated with the advent of industrial capitalism and the formation of the bourgeoisie as a trend-setting social class. That said, modernity matters. It has been anchored in the philosophy of European Enlightenment proliferating from the late seventeenth century onwards, and it has inspired numerous social and political movements concerned with defending, among other things, the idea of personal self-direction and the liberation from autocratic rule in various historical instances (Stråth and Wagner 2017). Moreover, as British sociologist Anthony Giddens once commented in his seminal essay on the ‘consequences of modernity’ (1990: 55–63), the spread of modern ideas until the end of the twentieth century entailed the inception (or at least propagation) of public institutions in the best interest of all members of a given national, or even multinational, community (for similar observations, see Bauman 1995: 108 and Grewal 2019, drawing on Habermas). This implication of modern reasoning remains highly relevant to twenty-first century Western society.

But what is modernity about? The social sciences have portrayed it in many ways, and the concept itself has proved multi-faceted. Following the long road of modernisation theory, several landmarks, however, remain outstanding. This body of theory had its heyday after World War II – and, notably, those strands were crafted by US-based sociologists (see the overview by Knöbl 2001: 30ff). Their work conceptualised modernity as a blend of markets, rationalism and legal universalism in a context of growing (functional) differentiation and individualism. Concerning legal norms, modern thought signals an ethical commitment to the civilisation of human relations, which has undeniably stimulated various collective arrangements in the Western world. Thus, by building such arrangements, society as a whole subscribes to enabling all people to enjoy a secure life. A further landmark en route has been rational reasoning, with modern thought stressing both its triumph over mythical sense-making and its ability to distinguish human-made means and ends, as well as causes and effects. This includes insights into the thoroughly social character of human action, accounting for the strong influence of supra-individual forces on the living conditions of each citizen.

Importantly, modern forms of sense-making contain ‘sacred’ ideas from pre-modern times, which have come to shape post-Enlightenment institutions and ‘often have a foundation in religious and traditional belief systems’ (Venn and Featherstone 2006: 459). While these systems have been ‘reworded’ in the course of time, some of their references build on an

epoch-spanning ideational ontology with strong symbolic power. For instance, traditional values referring to the imaginary of mutual caregiving turned into normative foundations of social support systems. Amid ongoing modernisation, the above references became major reference points for both institutional and organisational arrangements that were dedicated to improving (or maintaining) personal well-being (Villadsen 2011). A further case in point is the pledge for (basic) human rights (De Schutter 2013; Pogge 2015). If we put aside some dark episodes during which such rights were ignored (see below), the conviction that citizens deserve certain entitlements for the simple reason that they are human beings has seen a ‘worldwide diffusion’ during the modern age (Porpora 2014: 84), and, in particular, since World War II (see below).

The spread of (parliamentary) democracy is often deemed a corollary of this movement although, in the tradition of Western liberalism, political rights have frequently remained detached from commitments to ensuring human well-being in material terms. Rather, meritocratic orientations and a praise of personal achievements were a key backbone of the modern social order during the twentieth century, with markets being viewed as a key institution of modernity. According to the liberal legacy, modern values imply economic freedom (Stråth and Wagner 2017: 179–80), with property rights being understood as basic ingredients of a fair societal order. This understanding is not necessarily consonant with the modern concept of individual autonomy, given that, in a market relation, a person's capacity for self-direction can be constrained by the economic power of others.

That said, modern institutions have often been viewed to be amenable to human progress. American sociologists Talcott Parsons and Edward A. Shils (1951), using their famous pattern variables, defined modernisation as a process by which the values of the post-traditional era superseded those of the pre-modern era. In a modernised society, they contended, a person's reputation arises from effective achievements (e.g., in the economy) rather than from mere ascriptions (e.g., through birth). Concomitantly, norms susceptible to regulating public life are, by their nature, universalistic rather than particularistic (which implies the rule of law). Social action in this context is based on affective neutrality rather than on personal emotions (e.g., in public administration or in private business), with human praxis encouraging, most notably in the field of gainful work, specialisation rather than generalism. This understanding of modernisation – prominent with many other post-war writers (for instance Berner or Lerner) – was impregnated by the belief that, with history moving on, the ‘promises’ of modernity would become true to an increasing degree. The societal order was defined ‘through reference to the future’ (Maccarini 2014: 60). Fundamental to this was a faith in the growing ingenuity of both the natural sciences and the humanities, where each deemed to support a better mastery of challenges faced by ever more complex societies.

Importantly, many strands in this body of theory have been accused of ethnocentrism (Costa 2019; Araujo 2021). According to critics, the mainstream of modernisation theory wrongly insinuates that human life and its social organisation can, and do, develop according to one and the same master plan worldwide. Indeed, historians have found enormous international variety when studying the influence of Western (modern) values and of institutional or organisational models inspired by them. A case in point is the work of Shmuel N. Eisenstadt (2000) on the ‘antinomies of modernity’. For instance, in his eyes, humankind has seen multiple modernities based on different versions of rationalism. Other scholars submit that the very concept of modernisation carries the bias of a ‘Eurocentric, expansionist, imperialist “trajectorism”’ (Heinlein

et al. 2012: 12, referring to Appadurai) that sidesteps the enormous international tensions arising from the Occident's historical hegemony (Lessenich 2023). Even within the Western world, studies dealing with 'varieties of capitalisms' (for a summary, see Hay and Wincott 2012: 33ff, or Iversen and Soskice 2019) indicate strong heterogeneity between national models for social development, with some of these models borrowing only partially from the legacy of European modernity (Karreth 2018). Thus, the wider scholarship hints at important discrepancies – even between Europe and North America, that is, the 'two Wests' – in their respective interpretation of modern ideas (Kessler-Harris and Vaudagna 2009; 2018).

A similar debate has emerged among scholars studying the impact of globalisation. Some strands of comparative sociology, being impressed by the spread of free trade and cultural internalisation, imply that extant differences between world regions become diluted with increasingly open borders. Meanwhile, other accounts stress the resilience of national or local references. It should be noted beforehand that globalisation is an elusive concept, denoting – among many other things – the internationalisation of trade, the global dissemination of cultural fashions and the worldwide propagation of distinctive management models. By mixing up these dimensions, narratives that suggest one sole global agenda of social, political and economic change miss many important nuances (see the discussion in the introduction to this book). Thus, in many places, smaller geographical entities (regions, big cities) seem to have become more 'idiosyncratic' in their (regionalised) ways of organising economic and social life – a movement which some scholars have baptised 'glocalization' (Robertson and Khondker 1998). Furthermore, it is obvious that the spread of capitalism as an economic order has not necessarily extended to the proliferation of democratic institutions and has entailed only a *partial* convergence of worldviews or lifestyles around the globe. At best, we are faced with the phenomenon of international asynchronicity, which leads to considerable variety in the spread and prevalence of basic Western values even in emerging or newly advanced economies. What is more, recent years have seen a partial 'drop in public confidence' concerning globalisation being beneficial to all (Steger and James 2019: 13). This trend is associated with the vogue of political authoritarianism and related processes of 'cultural backlash' in various world regions (see Iversen and Soskice 2019; Crouch 2019a; Bloom 2023). In some countries, ultra-traditional movements have been pushed by anti-globalist sentiments and carried by political forces that avow themselves to partially isolate their imagined (national) community from global influences. The resurgence of economic nationalism in some jurisdictions – culminating in the Russian attack on Ukraine in 2022 – is astounding. The least one can say is that we are faced by various varieties of globalisation (Berger and Huntington 2002; Schmidt 2014), featuring different concepts of what is considered to be human progress.

That said, Western societies continue to incarnate a very influential variety of modernity, in all the respects discussed above. In a 'long durée-process' (Chase-Dunn and Lerro 2016), they have successfully exported institutional designs to countries in the East and Global South (Steger and James 2019) – which has led sociologists to the contention that 'modernity is inherently globalising' (Giddens 1990: 63). In the twenty-first century, so the argument runs, both the economic elites and the better-educated middle classes from different continents have more in common than ever before, reflecting what has come to be labelled a worldview of cosmopolitanism (Fine 2007). In the same vein, numerous international institutions (e.g., the O.E.C.D.; the U.N. and affiliated entities; NGOs, etc.) seem to speak the same 'language' concerning various issues of general interest, concerning, for instance, the question of human

rights or the problem of climate change. During the 2000s in particular, this experience led some scholars to proclaim the formation of a ‘world polity’ (Meyer and associates 2010). These views suggest that, a global order in which basic Western institutions will become ever more hegemonic – with transnational standards proliferating. This implies a clear impact upon the understanding of what is deemed ‘appropriate’ in areas as different as public infrastructure building; the governance of capitalistic firms; performance management in organisations; the design of technological devices; and popular consumption.

Importantly, the internationalisation of institution building also affects the realm of social policy making (von Gliszczynski and Leisering 2016). While national frameworks continue to matter greatly in this area, scholars have observed various processes of cross-national policy adaptation over the last decades (see, for instance, Ferragina 2022). To be sure, these processes are complex, given that international concepts aiming at transforming entrenched institutions may still encounter the influence of national traditions and related organisational particularities (see Bode 2014a, or Bode and Culebro 2018, for the case of social services and healthcare respectively). Over many years, trends towards institutional convergence often materialised in a spill-over of policy concepts from the U.S. to Europe (Clarke and Newman 2012). Meanwhile, Northern America has become ‘more European’ in some ways, for instance, when regarding political reactions to social deprivation (Béland et al. 2022). During the Biden administration, several regulatory concepts anchored in European countries have gained increasing influence, for example, public infrastructure building. The least one can say is that European welfare states have remained a laboratory under intense observation worldwide. There is little doubt that policy approaches travel cross-border and will (continue to) impact upon national landscapes of organised welfare provision in the twenty-first century – even though the character and direction of this impact is open to empirical scrutiny.

Theories of modernisation imply that regulatory concepts created in the Western world have become imbued with a distinctive set of collective orientations which have sedimented within distinctive public institutions. In their understanding, Western societies develop under the influence of overarching normative ‘agendas’. Although historians hint at national varieties – which implies that several agendas may operate in parallel – studies on modern Europe display commonalities across diverse trajectories, thus delineating critical ingredients of the institutional set-up within which the above agendas have been nurtured. Thus, Stråth and Wagner (2017: 168; 169) argue that, especially after 1945, European societies tended to become more ‘democratic in an egalitarian-inclusive way’ – rather than ‘formally restricting political participation to narrow elites’ and ‘letting the laws of the market and capitalist competition reign supreme’. They also illustrate how, during this period, the notion of ‘progress’ became a reference point in parts of the European polity (Stråth and Wagner 2017: 172). In their eyes, the dominant imaginary became that of a standardised, secure life course for all citizens of a given nation-state, with limited scope for individualistic orientations. Political authorities, they point out, sought to design an institutional set-up ‘that appeared to be both functionally viable and normatively desirable’ (ibid). Human rights became a major reference point in this movement. While citizens were expected to obey a larger set of collectively binding rules, they were also seen as deserving collective support when facing problems in aligning with the ‘standard’, stratified life course model. With hindsight, it seems that this orientation never stopped gaining momentum since then. The post-industrial settlement of the twenty-first century has even borne a ‘tendency for “human rights” to prevail over prior statutory rights’ (Archer 2014:

11). At least, these respective traditions remain universally invoked at this historical stage (Porpora 2014: 85, see also Moyn 2018).

This reading is consonant with observations once made by British sociologist Thomas H. Marshall in his famous study on social citizenship (Marshall 1950). Retracing the historic sequence of the establishment of civic, political and social rights within major Western societies, he found that this sequence was a cumulative process since the beginnings of modernity. With an explicit acknowledgment of human individuality, these societies developed commitments to respect the latter in more systematic ways – if it was within the confines of what was viewed as indispensable in terms of binding collective norms. Kessler-Harris (2009: 3) has argued that this ‘phase model’ had important repercussions throughout the modern world, given that, during the twentieth century, ‘new social compacts came to recognise the value of preventing destitution and diminishing differences in status and resources among individuals’. One could conclude that the very idea of citizenship rights has infiltrated the process of institution-building in recent Western history.

As noted earlier, with the transition to the modern age, some pre-modern orientations have morphed into novel public expectations. A case in point is the moral appraisal of care-giving (Hankivsky 2004). This appraisal, rooted in the value of human dignity, has led various national communities to organise (basic) support to fellow citizens facing distress and hardship, regardless of their capacity to reciprocate directly and personally. In modern societies, the respective moral obligation has often been ‘shared’ with families and private households, yet its collective character is obvious from a historical perspective. The same holds for the moral duty to cater for the well-being of children and certain ideas of social justice, for instance those concerning the acknowledgment of effort. Thus, the universe of modern values has come to embrace respect for human work, regardless of how erratic the economic conditions are under which it is achieved (Sennett 2003: 57). As German sociologist Wolfgang Streeck (2013) notes, such inspirations, while being diffuse and controversial, grew into critical ‘non-economic’ foundations of Western Europe’s social model during the twentieth century. The same holds for the expectation that modern human beings should enjoy opportunities for self-direction in major social spheres, a trend that went viral with political movements in the 1960s (Stråth and Wagner 2017: 172f). The conviction that human beings should be enabled to forge their own life course and style of life accommodated claims for public action to ensure that all citizens would have access to basic material resources both at the beginning of their lives and in times of personal hardship (such as the inability to work, for instance). In this sense, modern capitalism has always been nested in a moral economy under which people have rights ‘that take precedence over the outcomes of market exchanges’ (Streeck 2013: 300).

A further lesson to infer from the wider literature is that this moral economy, and the institutional set-up of modern societies more largely, has never been inert. Rather, modern thought has championed the idea of human creativity, deeming constituencies of citizens able to purposefully rearrange their conditions of existence, notwithstanding that ‘human actors always, ineluctably, practice their creative agency from situated circumstances’ (Porpora 2014: 79). Historical accounts suggest that the age of industrialisation – featuring, among other things, urbanisation, mass production and extended public education – provided fertile grounds for such agency. Major triggers were the tightening of social bonds and the rise of larger, meaning-providing contexts of collective action (mutual societies, trade unions, humanitarian associations, etc.) which created opportunities for developing or defending concepts

concerning the collective organisation of human life (Eder 1993). Moreover, modernisation theory implies that humankind is inventive when facing discrepancies between ambition and reality. This also pertains to situations in which modern institutions are perceived to constrain self-directed human agency, for instance in the event of the previously mentioned ‘sacred’ elements being undermined by means-end reasoning. Thus, as Str ath and Wagner (2017: 187) observe, the ‘individualist-instrumentalist model of the human being and of society and polity’, while endemic to twentieth Western societies, ‘never went uncontested’ and prompted collective resistance among those suffering under the force of this model.

French sociologist Alain Touraine (1973; 1998) has argued that modern subjects proactively handle tensions caused by the wider circumstances of modernisation, for instance the spread of impersonal rationalism and human alienation. In his eyes, social pioneers constantly recalibrate such circumstances given that, for example, professions and organisations enmeshed with civil society are capable of rebuilding institutions that are sensed to have become sluggish or repressive. Touraine’s approach implies that modern societies can conceive of themselves as being self-producing entities able to overhaul established regulations and institutions. His view is echoed by Maccarini (2014: 60, 74) who claims that many citizens in the Western world see ‘a surplus of possibilities of action and experience’ when considering options for (re)shaping the social organisation of human life and creating opportunities for empowerment.

Following this line of reasoning, modernity fabricates agents capable of resisting its own self-destructive (institutional) side-effects. Across various social contexts, so the argument runs, the contemporary subject is led to ponder the ‘ultimate concerns’ of human existence and of the wider social universe (see Beck et al. 1994; Genov 2018). Obviously, this observation must be weighed against enduring constraints that delimit a (Western) citizen’s capacity to influence his or her destiny, for instance economic hardship or a low position in a given status system. Nonetheless, the above scholarship provides us with clues for understanding modernity and its normative agenda(s) as a collective project geared towards shaping its own future (see Archer 2014; Porpora 2014; Delanty 2021).

## 1.2 THE IMAGINARY OF SOCIAL MODERNITY

As pointed out briefly in the Introduction to this monograph, the term ‘social modernity’ refers to a possible architecture of societies, bearing in mind that this architecture is vision rather than reality in contemporary Europe. As an imaginary, the underlying vision embraces arrangements that systematically account for the role of super-individual factors in the shaping of human life. Moreover, this vision is predicated on the assumption that the organisation and development of such arrangements requires purposeful public action. It also connects with a set of more ambitious emancipatory principles that signal a distinctive understanding of human progress, which will be spelled out in greater length below. In general, the above reflections about modernity and its agenda(s) suggest that European societies have invented ‘devices’ aimed at influencing the welfare of their citizens. Historically, such devices have taken shape within the confines of nation-states, meaning that most ambitions inspired by the vision of social modernity are pursued in this particular institutional context. Related efforts materialise in what this book – partially borrowing from Salminen (1991) – labels organised welfare provision, that is, a set of collective arrangements that have been forged throughout several stages of modern history. To be sure, most of these arrangements only partially comply

with emancipatory ideas and often sit uneasily with concurrent fixes which contaminate the ambitions contained in the above vision. Nonetheless, they often carry the seeds of a more encompassing project and therefore lend themselves to studying the role of that vision during specific historical episodes.

In the wider academia, the very notion of social modernity only surfaces on rare occasions. The term has been explicitly used in recent essays by Habermas, dealing with the future of European institutions (Grawal 2019). Moreover, several strands of the social sciences – most notably those concerned with public policy-making, the evolving political economy of Western countries or welfare state development more broadly – engage with some components of the related imaginary. As mentioned in the Introduction to this book, the latter has been the lynchpin in Nachtwey's work dealing with the (alleged) decline of the post-war model of welfare capitalism in Germany from the late 1990s onwards (Nachtwey 2018). Although this work is confined to a distinctive stage of social development in one sole country, it is highly instructive for grasping the features of welfare arrangements that have the potential to both foster emancipatory dynamics and contribute to producing socially balanced agreements within contemporary Europe. To some extent, Nachtwey's analysis borrows from earlier portrayals of what is referred to as the Fordist, or advanced industrial age, lasting approximately from 1950 to 1980. Concomitantly, his work delineates a range of regulatory provisions susceptible to enhance the life course of twenty-first century Europeans.

According to this account, the first important feature of the above post-war model was the generalisation of comprehensive school education and post-school training. Thus, during the second half of the twentieth century, new opportunities arose for attaining skills beyond the demands of the mere job market or a narrow set of (potential) employers. This undoubtedly enhanced the potential for self-direction among larger sections of the working population concerning the shaping of a person's life course. One expression of this movement was the rapid spread of academic degrees, including those delivered by professional schools or universities of applied sciences. Nachtwey points out that a growing portion of the blue-collar workforce and of other lower strata (farmers, children of poorly skilled employees etc.) were encouraged to acquire such degrees. Over the course of time, this trend extended to the bulk of women who had long been impeded from taking higher education or embarking on (more sophisticated) forms of vocational training. Important side-effects of this movement included better access to 'civic' knowledge about the political fabric of Western society and an acquaintance with (some) segments of higher culture (De Swaan 1988). While related emancipatory dynamics remained selective in many ways, developments in this area resonated with modernity's promise of equipping all citizens to discuss and arrange 'socially balanced' agreements in their communities.

Furthermore, the post-war decades saw a rise of opportunities for sustainable upward mobility – whereas the risk of social descent was overall more limited. Developments in the regulation of labour were key to this, paving the way for a less hierarchical social fabric. Throughout the second half of the twentieth century, Nachtwey's analysis suggests, these developments were facilitated by strong economic growth and the spread of increasingly sophisticated technologies, propelling the demand for better-skilled workers outside the agricultural sector and industrial mass production. Nachtwey captures this movement by portraying developments in post-war Germany, but other European countries followed the same track for a while (Therborn 1995). Regulatory frameworks taking shape during that time allowed for a further



key 'modern' promise becoming more realistic for larger sections of the population, namely, the pledge that educational effort and 'ordinary' hard work would pay off throughout an individual's life course both in terms of personal income and social status. With these prospects – and the moral economy attached to them –, differentials in social position appeared changeable, rather than tied to entrenched hierarchies. The widespread experience of such life courses nurtured beliefs in a certain idea of social justice, based on a blend of large-scale meritocracy and general respect for personal work efforts, including of those having an average job.

A further cornerstone of this settlement, Nachtwey contends, was income protection combined with (comparatively) low conditionality. Collective arrangements provided a good deal for the (male) workforce with access to stable and reliable income replacement in the event of illness, unemployment or work incapacity and, in short: social security. Importantly, the latter extended to later life, with elderly people being exempted from work obligations. Internationally, social security became operational by means of specific devices – for instance, legal or negotiated rules for employment protection (against dismissals) or the continuation of payment during a temporary inability to work. As German sociologist Franz-Xaver Kaufmann (2001) argued a while ago, related welfare programmes built on the widely shared expectation that there should be some predictability of one's future social situation. In (late) twentieth century welfare states, this idea shaped the mind-set of a vast majority of Western European citizens, as well as the mass organisations representing them. This echoes Giddens's observation of modern ideas of security being tied to the 'organised' control of risks, based on institutions that can be trusted (Giddens 1990: 34–6). Thus, at least for male breadwinners employed in core industries of the capitalist economy and in the public sector, the dominant concept was (employment) protection against unforeseeable market dynamics. This concept differed from what was viewed as 'normal' both during earlier periods of the industrial age and after the transition to the post-industrial configuration (see below). Social security schemes were aimed at accommodating the very condition of (typical) wage-dependent work and compensating hardship induced by factors outside individual control. Following Nachtwey, the respective regulatory frameworks were expected to alleviate drastic impediments to personal self-direction and were, in that respect, imbued with an emancipatory aura.

This reading of social development overlaps with paradigms focusing on the political economy of democratic (welfare) capitalism. In his famous book dealing with varieties of Western 'welfare regimes', Danish sociologist Gøsta Esping-Andersen (1990: 3) referred to the aforementioned arrangements as a source of 'decommodification', given that they 'permit people to make their living standards independent from pure market forces'. For waged employees, this institutional protection materialised in formal entitlements which were tied to a formal social status and came with limited behavioural requirements. Throughout the post-war decades, this logic became instilled into major income replacement schemes. True, internationally, these schemes markedly differed concerning the degree of decommodification. For instance, wage-related income replacement was more widespread in mainland and Nordic Europe than in Britain's liberal welfare regime. However, even the latter saw a short period in which social security-like institutions were flourishing. Moreover, concerning the regulation of waged labour more generally, most European countries had instituted some type of 'protective legislation' (Olsen 2019) by the late 1980s, including at company level. This legislation also included options for workers to have an official spokesperson in private and public undertakings.

French sociologist Robert Castel referred to this approach as the attribution of ‘earned rights’ (Castel 1995) through which major sections of the wage-dependent workforce were enabled to maintain some control over their life courses. Castel’s line of reasoning suggested that institutionalised guarantees help(ed) workers gain self-confidence. Again, we find international discrepancies concerning the inbuilt frames of reference (Devine et al. 2005). Thus, in the UK, the mentality discussed above remained associated with working class thinking, whereas, in some parts of mainland Europe it enabled employees to share the feeling of belonging to the middle class(es) – notwithstanding that this social ‘upgrade’ often proved to be illusive. Notably, the actual benefits arising from this ‘earned rights’ model were rather modest for many women and lower ranked sections of the working population (see below). That said, during the last decades of the twentieth century, the institutional set-up of most European welfare states was markedly influenced by the idea of ‘earned rights’ and, in this respect, charged with emancipatory promise.

The wider scholarship also hints at a further bundle of collective expectations which led into a – more or less far reaching – institutionalisation of care arrangements (Arts and Verburg 2001). Overlapping with the imaginary of human rights and earned social entitlements, these expectations were imbued with more traditional norms of human dignity and laid the ground for the creation or expansion of formalised human services during the late twentieth century. Little by little, all Western countries established institutions and organisations with a remit to offer medical services, education and professionalised personal support, including by social work, which conveyed the message that ‘modern welfare provision is more than social insurance’ (Hemerijck 2013: 23, emphasis added). The rationale behind such initiatives is often viewed as residing within the elite’s interest in making people perform their roles in an increasingly complex societal order (De Swaan 1988). That said, the Enlightenment and its aftermath brought strong tailwinds for the belief that there should be publicly regulated social interventions to empower and support human beings in difficult life situations including episodes of disability and frailty. In contemporary welfare states, it is widely expected that national collectivities assume part of the responsibility for these situations and organise service facilities with a mission to form, or re-establish, human capabilities in systematic ways or, at least, enable incapacitated citizens to live as a full member of society. Such expectations have also fuelled the welfare state response to the Covid-19 pandemic at the beginning of the 2020s.

To a varying extent, they also reflect a more comprehensive ambition that chimes well with the vision of social modernity, namely the building of an infrastructure ensuring equal access to public services. One outstanding expression of this ambition is the formation of (various types of) ‘healthcare states’ in Europe and beyond (Blank et al. 2018: 10), based on the idea that cure and care should be provided to all citizens, according to the latest scientific standards and more or less free of charge. Put aside differences in terms of enforceability and generosity (see e.g., Böhm 2017), current European healthcare systems come rather close to this ambition – at least when regarding their institutional design. Likewise, Western societies have, albeit less effectively thus far, given birth to social care systems with a similar mandate. While scholars dealing with these systems point to important international differences, the systems’ expansion over the recent decades has been a global phenomenon, including when it comes to social work more specifically (Anttonen et al. 2003; Lawrence and Lyons 2013). These systems build on emancipatory promises insofar as they have a holistic remit to assist

citizens facing problems to fully participate in modern life. True, social work theory is clear about some of these interventions being suffused with behavioural prescriptions and moral paternalism (Hasenfeld 2000), but the expansion of related activities also signals greater collective responsibility for individual development broadly speaking. A similar dynamic is epitomised by efforts geared towards ensuring a (more) sophisticated socialisation of young people in order to enhance children's capacity for (future) self-direction (Daly 2020).

The scholarship portraying the development of the above arrangements leads us to conclude that many of these arrangements were breathing the spirit of an emancipatory project and could be perceived as building blocks of a more encompassing vision for human progress. To some extent, these building blocks epitomise Marshall's idea of 'social citizenship' (see Dwyer 2010; Evers and Guillemard 2013), notwithstanding the fact that this idea can, and did in past times, translate into different institutional designs (see Bode 2008b, for the case of Germany and the UK). As scholars engaged with these designs highlight, welfare state institutions inspired by the idea of social citizenship are a prerequisite for a more individualised life course in modern society as they provide citizens with greater autonomy concerning occupational, familial and lifestyle issues (Leisering 1997; Verschraegen 2015: 66). True, throughout the Western world, the institutional commitment to personal autonomy does not extend to the sphere of corporate life; moreover, related opportunities are predicated on someone's economic, social and cultural capital. That said, the imaginary of collectively guaranteed entitlements represents a precondition of individual freedom which concurs with essentials contained in the modern vision of social modernity.

Importantly, scholars retracing the historical development of Western societies allude to the fact that, to ensure social citizenship, modern societies invented compulsory regulatory frameworks that citizens cannot evade. This idea is largely compatible with Enlightenment thought and constitutes a (further) building block in the above vision. To some extent, it led these societies to put some societal sectors under direct government control or even to design the social and economic conditions of human life at greater scale (Stråth and Wagner 2017). Thus, governments in office during the twentieth century were keen to develop infrastructural facilities that were publicly owned and state-controlled. Up to the 1980s, the respective toolset comprised a diversified set of public utilities, extensive market regulation (including the workings of the financial sector) and instruments to coordinate critical areas of industrial production (coal, steel, cars, ships, planes etc.). Public planning appeared as both possible and necessary (Kahn 1969). The idea of state intervention in the economy was quite popular, certainly so in mainland Europe and in Nordic countries where important sections of the elite(s) were sympathetic to a political management of capitalism, referring to the model of 'mixed economy' (Stråth and Wagner 2017: 166).

Concomitantly, the development path of Western societies has often been portrayed as leading to a vibrant democratic polity which can be viewed as a further building block in what is conceptualised by Nachtwey as social modernity. The intensification of democratic processes in advanced European societies begun with the broadening of electoral competition and the 'ascendance of social democracy' (Hicks 1999: 76). This included the role of mass organisations of the wage-dependent working population growing more influential in the political universe of European nation-states. This was an important milestone in the formation of what political economists refer to as democratic capitalism (see the Introduction to this book and below). Furthermore, during various historical episodes, the above universe

of structures relied on negotiated public policies. While in some parts of Europe the latter remained confined to a more informal ‘government by moonlight’ (Birkinshaw et al. 1990), many countries in Europe instituted formal procedures to involve stakeholders in rounds of political deliberation, most notably interest groups representing workers, employers, industries and other collective stakeholders (Schmitter 1974; Berger 1981; Hicks 1999: 127–52). In mainland Europe, this arrangement has often been referred to as ‘(neo-)corporatism’ – a term that denotes both an analytical and normative approach to public administration holding sway in the 1970s and on some later occasions as well, with one major arena being the regulation of waged labour. In a similar vein, social compacts of various kinds were instigated in order to (re-)organise human service sectors in some European countries (from the 1990s onwards); negotiated policies also surged after the outbreak of the Covid-19 pandemic in 2020.

According to scholars studying this mode of interest intermediation – that is, the steering of public affairs under the combined influence of organised interests and parliamentary democracy – such initiatives went beyond a mere appeasement of class conflicts. They occurred notwithstanding the fact that the latter objective was often assumed to have prevailed in what political economy scholars call the era of organised capitalism (Lash and Urry 1987). Hence, Stråth and Wagner (2017: 172) employ the notion of organised modernity to suggest that governments, at that particular historical stage, were expected to directly involve (organised) policy stakeholders in the shaping of public institutions. True, some social forces were excluded from these forms of ‘thick’ democratic rule (see below), even as negotiated policy-making did not necessarily incapacitate the ‘laws’ of private property and wage-dependent labour. Yet, nonetheless, the state then seemed to be more than a mere ‘protector of the crisis-ridden capitalist order’ (see Stråth and Wagner 2017: 150). To the extent that organisations representing substantial sections of the (working) population were more directly involved in the steering of society, there were hopes of an increasing potential for achieving socially balanced agreements in important realms of social life.

In light of all this, the imaginary of social modernity can be viewed to have partially impregnated the institutional set-up of twentieth century welfare states, materialising in a number of concrete arrangements, among which were labour market regulation, guaranteed income replacement, earned pension rights, professionalised human services and democratic interest intermediation. Arguably, some arrangements of this kind are infused with an emancipatory spirit and exhibit a potential for human progress, provided that these arrangements ‘work’ and extend to all citizens in a given jurisdiction – which, as we shall see in what follows, has not always been the case thus far.

### 1.3 DISCONTENTS WITH THE MODERNISATION NARRATIVE AND THEIR IMPLICATIONS

Concerning the tenet of human progress being an outcome of modernisation, French sociologist Émile Durkheim was among the first to argue that the dispersed web of human interactions shaping modern life was imbued with ambivalence (see Elliot and Lemmert 2014 or Riley 2015). While he maintained that these interactions came to rely on a ‘new morally cohesive code’ (Elliot and Lemmert 2014: 30), he viewed modernisation as giving way to individualistic behaviour and social relations with a built-in tendency of dissipating communities and destroying (mechanic) solidarities (that is, those moral bonds which take shape ‘automatically’

when people interact on a permanent basis). For German sociologist Max Weber, the rise of modern rationalism entailed further intricacies. He argued that such rationalism, though enabling high-performing institutions and organisations, would be prone to create ‘iron cages’ – that is, a bureaucratic universe from which people could not escape easily (Waters and Waters 2015). Karl Marx (1973) raised similar concerns when engaging with the political economy of modern industrialism. He found that the latter, while facilitating the spread of certain civic values (those held by the bourgeoisie), bred an economic system fostering ‘social relationships ... reduced to the status of commodities’ (Smart 2003: 9). Marxists posit that the related settlement rests upon a couple of ‘fundamental institutions’ (Screpanti 2001) – among which a distinctive regime of property rights and special contractual arrangements – which provoke a systematic instrumentalisation (and exploitation) of human beings by some of their fellows. In a similar vein, French philosopher Michel Foucault, exploring the ‘humanistic struggle for secularizing the society and politics’ (Oram 2016: 4), argued decades ago that modern thought, while promising freedom and self-direction, was fraught with moral authoritarianism. It would also be prolific in sustaining technologies of social control running against the ‘official’ mantra of human liberation. Likewise, critical theory, dealing with various pathologies of Western history, was (and is) standing in the front row of those who contend that, in modern societies, instrumental rationality tends to deform human relations, and not solely during the dark episodes of totalitarianism (Bronner 2017: 53–60). Related experience challenges a major building block of the theory of modernisation, namely the assumption that – apart from some anomalous accidents – humankind will constantly advance towards a state of civilisation featuring full democracy, the rule of law, the primacy of scientific reason, as well as socially balanced distribution of resources and opportunities to enable all people to enjoy a self-directed life.

At least, there are ‘discontinuities of modernity’ (Giddens 1990: 4), which appear highly relevant to the theme of this book. Historically, many promises associated with modern reasoning – let alone the vision of social modernity – have become a reality only for some time, for some people, and for some aspects of human life. Indeed, with hindsight, there is no point in glorifying the past of twentieth-century industrial capitalism. According to Stråth and Wagner (2017: 172), the ruling elites during the post-war decades were selecting ‘from the wide range of historically generated possibilities ... a limited number of those that appeared to be both functionally viable and normatively desirable’. Alternative options were ruled out even as some of the selected arrangements appeared to exhibit severe limitations concerning their fit with emancipatory modern ideas. This is exemplified, first of all, by the wide-reaching critique from dissident social movements in the late 1960s, indicating a strong disenchantment over expectations driven by these ideas (Eder 1993). Novel claims had surfaced and challenged previous compromises. Criticisms were levelled against the poor participation of social minorities in post-war democracies and the implications of industrialism regarding the quality of life in both work settings and the private sphere. From the perspective of the better-educated (new) middle classes in particular, political life was lacking substance, squeezed in superficial party manifestos used for episodic acts of ballot voting. Moreover, as Stråth and Wagner (2017: 171) put it, ‘social progress through welfare state measures’ was perceived to be enmeshed within a ‘standardization of life-situations’, at odds with increasingly individualistic aspirations among the wider citizenry. At this historical stage, public authorities were refraining from what social scientists later baptised ‘life politics’, which would include the recognition of special cultural

identities or sexual orientations of minorities. For the time being, autonomy in these respects was not yet a big issue. In a similar vein, achievements of the twentieth century's welfare states have been found to exhibit a clear bias towards what sociologists have termed the 'male breadwinner model', with men enjoying opportunities to build careers or at least benefit from 'earned rights' in the above sense while females remained largely dependent on them (see Trappe et al. 2015, for the case of Germany). In light of this, the seeds of social modernity sowed at this time were mingled with ingredients that ran counter to Enlightenment ideas and inbuilt emancipatory principles.

Various social scientists even suggest that major ideas associated with modern thought have, from early on, been an illusion. Thus, French sociologist Bruno Latour (2003: 38f), dealing with challenges induced by modern technologies, once argued that 'there never was a time when modernity's interpretation of itself described its deeds adequately'. In his eyes, the process of modernisation was anything but driven by 'ideals of science, some definition of freedom of the individual, [and] some ... civic or legal infrastructure'. Rather, the social forces dominating this process produced 'a very efficacious estrangement from their own practice which allowed them to do the exact *opposite* of what they were saying' (emphasis as in the citation). Examples include the lip service paid to peace-making occurring in parallel with the construction of weapons of mass destruction, as well as the respect paid to human rights at a national level but accompanied by their massive infringement abroad.

In addition, the observation that the maturation of modernity had allowed for equal opportunities in terms of social mobility has received a critique from various quarters which posit that the modern promise of a secure life for all may combine with a subordinate social status for the majority of citizens. French sociologist Pierre Bourdieu, decoding the 'pecking order' of Western societies during the post-war decades, portrayed this order as a social universe in which elite rule was upheld and consolidated by both material and immaterial factors. These come into play in patterned processes of human interaction throughout various fields. Following his analysis, a fundamentally unequal distribution of cultural and social capital (his own terminology) tends to make class boundaries impermeable in many instances. Accordingly, the political order established in the Western world is stabilised by an entrenched hierarchy of social layers, with individuals vying to excel within their reference groups and to protect their personal social status. Thereby, so the argument goes, larger sections of the population become trapped in lower power positions – which is in stark contrast with the imaginary of 'a society of increasingly self-transparent and increasingly sovereign individuals', as Farrugia and Woodman (2015: 637) comment.

Furthermore, a good deal of post-war social theory argued that Western modernisation had brought forth numerous 'fake achievements' instead of true human progress, particularly in relation to the scope for personal self-direction. Early critical theory was standing in the front row of the respective scholarship (Delanty and Harris 2022). Capitalistic societies were accused of constricting the above scope in systematic ways, because they kept people in a state of permanent heteronomy and social frustration. In addition, institutions of representative democracy were found to be unresponsive to major popular demands, a charge against the modernisation narrative popular until our times. Thus, (post-) Marxist accounts suggest that Western economies – featuring persistent dispossession and a structural subsumption of waged labour under capital – remain unchallenged in the polity either because of astute manipulation (Althusser 2014 [1995]) or implicit political repression (see e.g., Hardt and Negri 2017). In

this reading, the dominance of capitalism clashes with the promise of democratic rule and equal opportunities for all, hence this promise remains unfulfilled.

In a similar vein, a widespread observation in twentieth century sociology has been that modernity rests on an illusion of individual liberty. Critical theory is a case in point here as well (Bronner 2017). Thus, Herbert Marcuse once suggested that instrumental rationality, paramount within the (seemingly) civilised economic systems of the Western world, instils a ‘deranged’ logic into the latter’s culture industries and social life more generally. This occurs predominantly through activities like advertising, marketing and entertainment, which pervade the day-to-day life of large populations. In his eyes, this movement, taking shape worldwide during the twentieth century, led to a ‘decline of the individual’ (see Elliot and Lemmert 2014: 59) and an omnipresence of instrumentalist considerations which contain the potential for self-direction in critical spheres of human life. This chimes well with the (postmodern) critique of the contemporary economic order becoming transformed into ‘want-now’ consumerism, as well as more recent accounts that imply such consumerism can endorse authoritarian political regimes (Bloom 2023: 12, see below).

In a related way, the rationalisation of collective action has repeatedly been portrayed as being amenable to inhuman practices in the context of modern organisations. Such rationalisation, taking shape within abundant bureaucratic systems, is often viewed to have undermined fundamental Enlightenment ideas and to impact upon the living conditions of modern citizens. Thus, according to Horkheimer and Adorno (2002 [1947]) – both leading figures of critical theory – modernity brought forth a comprehensive sweep of regulations capsized into chronic pathologies (Bronner 2017: 53–60). Pointing to the power of ‘technological and scientific reason in the establishment of domination over the self’ (Elliot and Lemmert 2014: 44), this strand of critical theory portrays the (late) modern age as being rife with ‘organised’ constraints regarding a human being’s moral autonomy and capacity for self-direction. Recalling the many ‘ruins of modernity’ (Hell and Sconle 2010), it suggests that emancipatory institutions are constantly at risk of being perverted (Kellner 1989).

Michel Foucault (1971) made similar observations when describing the ‘genealogy’ of the modern social order, which he conceived of as unconsciously co-produced by human beings in their daily interaction. His work focused on the power of discourse that materialises in streams of communications which are deeply entrenched in social life and tend to discipline individuals via technologies of permanent surveillance and self-control. Relatedly, Foucauldians stress the ambivalent function of modern rationalism which streamlines human life according to (assumed) scientific evidence and particularly so in settings such as medicine and psycho-social support. These and other settings are seen as conveying a sense of ‘governmentality’, that is, a propensity to live and ‘self-manage’ one’s life according to what powerful organisations impose. Major levers for this are specific certified concepts, including the one of ‘rehabilitation’. From Foucault’s perspective, ‘modernity swept out of its decent existence into the backyard of asylums, prisons, hospitals and all other institutional elements of punishment, oppression and exclusion’ (Oram 2016: 110). As regulatory frameworks, organisations or professions are viewed as putting permanent strain on personal self-direction, Foucauldians repudiate the ‘belief in scientific advancement and faith in humanly engineered progress’ (Elliot and Lemmert 2014: 93) and foreground the role of ‘instituted social practices’ which ‘instantiate, reflect and refract power relations and contribute to domination and hegemony’, including the entrapment of people in processes of ‘self-subjectivation and self-responsibi-

lization' (Sum and Jessop 2013: 34–5; 112). The rules of discipline, record keeping and policing of discourse expose these subjects to 'a camouflaged-by-reason manipulation', making them willingly monitor their life orientations and govern themselves in line with 'the moral-functional responsibility of the state' (Oram 2016: 10; 18).

The social sciences host a further camp that challenge the narrative of purposeful (social) modernisation, namely, proponents of ('autopoietic') system theory such as German sociologist Niklas Luhmann (1982). Pointing to the tremendous complexity of contemporary Western society, his work implies that what once took shape as a coherent modern project has split into pieces over the course of time. This line of approach suggests that the permanent drive towards differentiation within and among social spheres undermines any coherent logic guiding the development of a national collectivity, let alone the value of humanity. Put in rough terms, human beings and movements are anything but creators of their own social realm – rather, they embody small cogs in a huge machine of over-complex and self-acting processes, unable to operate as active 'makers' of the social world.

A similar conclusion could be inferred from accounts that have proclaimed the age of a 'second modernity' (Beck et al. 1994; Maccarini 2014), starting with the transition to post-industrialism. Thus, German sociologist Hartmut Rosa (2013) submits that post-industrial societies are faced with an incremental decay of the modern idea of teleological practice, owing to the ever-faster pace of life and the escalating problems in (co-)managing the many contexts in which late modern subjects are involved. British sociologist Margret Archer (who defends a more nuanced standpoint) summarises this diagnosis as leading to a configuration in which people, due to the (alleged) 'impossibility of sampling all the options on offer within a single lifetime', are 'robbed of the stability needed for planning their lives' and end up exposed to 'perplexity and disorientation' (Archer 2014: 2). At least, Rosa's account implies that, with continuous 'flows' and rapid change in social life, the space for both conscious self-direction and the purposeful coordination of public affairs is narrowed down – in particular when it comes to collectively shaping the future according to agreed principles. The narrative of a 'second modernity' sees people involved in a convoluted process of personal sense-making at any moment of their life course. In this context, modernity turns out to be non-directional. In contrast to what system theory posits, individuals become the lynchpin of social life; however, they are assumed to be overburdened by a tyranny of choice and to refrain from (voluntary) long-term commitments related to collective affairs. Faced by pressures to constantly make decisions in all spheres of life and rethink these in the light of new, upcoming options, they struggle to develop a clear vision for their future. Hence modern societies can no longer be viewed as 'normatively integrated formations developing in linear ways', being driven by 'a teleological understanding ... that associates time and history with purposeful "progress"' (Heinlein et al. 2012: 7; 8).

The above observations accord well with theories carved out under the label of postmodernism. Focusing on developments during the last decades of the twentieth century, postmodernists argue that humanity is faced by a fundamental and irreversible loss of orientation, affecting every sphere of human life. In their eyes, the fixed status system established during the heyday of modernity has dissipated, together with all the (normative) references guiding that order – including, for instance, occupational identities, cultural ascriptions and political allegiances. Given the lost certainties of tradition and habit, wider sections of the population appear to struggle with expressing their personal identity and project of 'self-modification'.



Postmodernists also observe a generalised *angst* which exhilarates people and entraps them in a permanent process of self-dislocation (see Berman 1983). This worldview has also inspired Polish sociologist Zygmunt Bauman who blended postmodern reasoning with Marxist categories. He argued that human practice – including the agenda of politics and the essence of modern intellect — was long geared towards keeping ontological ambivalence under control (Bauman 1991: 7f), even as the belief in modernisation implied the ‘possibility of a human world free ... from the very possibility of wrong choice’ that would spur distinctive ethical, philosophical and political ‘prescriptions and proscriptions’ (Bauman 1995: 4). However, with the advent of postmodernity, ‘the supply of ethical rules is, by and large, privatised and abandoned to the care of the marketplace’, with citizens living in a ‘volatile atmosphere of flashing fames, flickery fads and freak franchises’ (ibid: 5). All this is seen to feed into a fragmentation of the economic, political and moral universe, impeding any coherent regulation of contemporary society (Přibáň 2016). In the words of Archer (2014: 1), postmodernists describe the world as fundamentally ‘uncontrollable and quintessentially kaleidoscopic in form’, that is, a place on which labile patterns of talk and action twin with ‘pulverised’ social structures and cultural systems. While these are bold contentions, we have reasons to assume that, in twenty-first century Western nation-states, common agreements based on collectively shared convictions are hard(er) to achieve in such a ‘liquid society’. Leaving aside rumours about the advent of a ‘post-truth society’ (for many, see Malcolm 2021) in which some social forces successfully discredit scientific knowledge, the hype of postmodern thinking may have passed its climax. However, the phenomena addressed by postmodernists cannot be ignored when discussing options and problems of social development.

All the discontents portrayed above indicate a more or less radical denial of the emancipatory potential of modernisation and implicitly downplay past achievements in line with the vision of social modernity. In essence, they suggest that collectivities of human beings are caught in systems and configurations they cannot control (or change), with advanced Western societies leaving ‘no room for institutions or organisations capable of concretely fostering ... solidarity in a world dominated by the commodity form, bureaucratic hierarchy, and the culture industry’, as Bronner (2017: 99) puts it when summarising the above strands of social theory. While this stance may become accused of being one-sided regarding the dynamics of social development in twentieth century Western Europe, critics seem to have a point when highlighting inconsistencies in the modern promise of human progress. They point to the ‘hybrid, cosmopolitan, heterogeneous, or creolized character of the institutions, organisations and subjectivities’ that characterise the modern age in the Western world (Venn and Featherstone 2006: 460) and warn us against a naïve faith in human progress, given that the ‘global hopes for social security and equality inspired by modernization’ have led to disappointments in many instances (Heinlein et al. 2012: 10). This seems to be the common message conveyed by approaches rooted in radical critical theory, including Marxism, Foucauldian thinking and the tenet of reflexive modernisation. Regardless of whether or not one subscribes to one of these approaches, it cannot be overlooked that recent history has seen many gaps between ambition and reality concerning the above promise.

At least, the previously discussed stands of social theory pinpoint multiple tensions inherent within modern reasoning and its impact upon social development. Thus, capitalism and democracy, both inventions of modern times, are strange bedfellows as ‘capitalism involves the insulation of the economic from the political against the backdrop of competitive labour

and product markets' (Giddens 1990: 59). Moreover, democratic rule coexists with powerful systems of surveillance within work organisations. In addition, beyond those social disruptions that are produced by capitalism as an economic system, it is necessary to account for the side effects of modern rationalism which are endemic to institutions geared towards civilising that very system. These effects emanate from the 'cold' means-end mechanism contained in the technical apparatus of Western bureaucracies and seem difficult to avoid in these particular contexts, especially when it comes to implementing publicly agreed norms in practice. More generally, capitalist modernity seems to come with in-built 'escalatory logics' (Rosa et al. 2017), which materialise in a tireless search for economic growth, new markets and more 'productive' human capital, exposing the social (and natural) foundations of human life to constant strain.

That said, the recent history of modernity has also witnessed enormous efforts to 'repair' damages caused in this process. Social forces have sought to draw lessons from experience with the above externalities and, more largely, the dark episodes of Western history. While many problems remain, the latter has seen correctional efforts at institutional or organisational level, in particular to guard humanity against the creation of new ruins and future acts of brutal discrimination. Moreover, taking modern values as reference points, institutional and organisational developments over the last decades do signify, as argued earlier in this book section, a constant influence of emancipatory principles in Western Europe. It even seems that, in some areas, this influence has gained further momentum in recent times. In this context, critical theory, while being primarily concerned with unmasking the oppressive or hierarchical character of advanced Western societies, never denied that modernity embraced a potential for domesticating this very character. Thus, in his essay reviewing the respective scholarship, German sociologist Jürgen Ritsert (2014) concludes that scholars from this camp acknowledge the potentiality of emancipatory effects contained in modern institutions. This particularly holds for the work of Habermas, according to which the social order of post-war European societies allowed for the development of a (more) civilised polity (see Bernstein 2010). The latter did not necessarily provide all citizens with opportunities for an open discourse about legitimate interests, shared preferences and ways to arrange common affairs without burdening stakeholders disproportionately. Following Habermas, the respective potential was often distorted by economic and state-bureaucratic influences which tend(ed) to penetrate, or 'colonialise', those spheres in which the prerequisites of discursive deliberation can be produced and cultivated – namely, in Habermas's terms, the human 'life-world(s)'. However, his work dealing with the institutional settlement of late twentieth century welfare states and the role of civil society therein implies that, to some extent, the aforementioned deliberative space is still available (Grewal 2019).

On balance, the discussion thus far suggests that modernity is a double-edged sword used on a battle-field populated by variegated social forces. Concerning emancipatory dynamics, modern institutions do have paradoxical traits. A case in point are markets and their ambidextrous architecture. On the one hand, markets appear as a constraint for those lacking relevant property rights. Both critical theory and (post-)Marxism suggest that, in advanced Western societies, they are dominated by powerful corporate actors who exert a strong influence on the cultural and political spheres (see Slater and Tonkiss 2001: 22–6). The capitalist labour market in which citizens short of private property (have to) sell their labour is deemed to produce (and constantly reproduce) a power bias in favour of the economic elites (Fraser and Jaeggi 2018;

Huws 2019). In many instances, moreover, markets have been found to reduce human beings to mere commodities, subject to operations guided by the instrumental rationality instilled in private business. In addition, the consumerist agenda of late capitalism is often viewed to put strain on personal self-direction, even within an individual's (private) life-world (see above). In this light, market institutions belie fundamental promises of Enlightenment thinking. On the other hand, however, recent contributions to economic and political sociology direct our attention to the complex social function of markets (Fligstein 2007; Nooteboom 2014) and imply that the latter may also have an empowering role. Thus, market liberties have a potential to curb social discrimination or xenophobic attitudes simply because they (are expected to) reward economic performance rather than anything else. With the advent of market relations, so the argument goes, an individual's social position no longer hinged on external ascriptions, assigned by ethnic criteria or a social status derived from earlier achievements (such as educational degrees). Furthermore, traditional (neoclassic) economics makes the case for markets offering people choice and exit options – and thereby a say in economic affairs. In the same vein, some quarters of the social sciences have seen individualised consumption as a 'kind of utopian moment' within capitalism, making the marketplace an 'empowering cultural resource' (Slater and Tonkiss 2001: 171–2). Part of the welfare state scholarship resonates with these reflections when arguing that contemporary social policies may combine 'market means and welfare ends' (Taylor-Gooby et al. 2004). Over the last decades, this view has gained prominence in the debate on the regulation of human service sectors. It features the claim that competing providers and a public 'commissioning' of services are in the best interest of (some) users (Le Grand 2007; Sturgess 2018; Dursin et al. 2021). This line of reasoning also undergirds the idea of a 'moral marketplace' (Singh 2018) populated by both people who donate to competing charitable projects and private companies which seek to attract users by committing themselves to 'Corporate Social Responsibility' and related benevolent activities. In all these cases, the combination of a classical economic institution and intentions to pursue non-economic values in the territory of that institution is viewed to boost public welfare. As will be discussed at greater length later on, this combination also comes with important downsides – yet the sheer existence of plural forms of welfare provision writ large hints at potential emancipatory effects of choice options in this particular field.

Theories dealing with modern state bureaucracy allude to a similar dualism. Bureaucracy is where institutional theory and the sociology of organisations meet. As noted earlier, Max Weber was aware of both its potential to 'get things done' and the many restrictions this may involve for personal self-direction in the aforementioned 'iron cage'. Important strands of social theory imply that the advent of modern thinking entailed a 'bureaucratic recasting of society' (Elliot 2014: 25), with instrumental reason pervading human life and interactions in various instances. An ever-growing reliance on scientific administration and management, these accounts imply, make means-end relations hegemonic in mainstream organisational settings and tend to deform human subjectivities by the rule of mechanistic prescriptions. The dominance of 'analytical-rational-mathematical reasoning' – to use the terms contained in the Foucauldian prophecy (see Oram 2016: 16) – is assumed to bend individual authenticity and to thwart opportunities for personal self-direction on many occasions. Based on hierarchical control and sophisticated surveillance technologies, this movement has received an additional boost in the above settings from the 1990s onwards, materialising into what some authors have referred to as neo-bureaucratic governance (Farrell and Morris 2003). It stands to reason that

this type of governance clashes with major emancipatory ideas born in the modern age. Other scholars, however, foreground a bureaucratic organisation's potential for accommodating these ideas, for instance with regard to its ability to treat citizens in equal and respectful ways (Du Gay 2000). In modern times, public organisations are widely expected to abide by this imperative, with services being operated irrespective of a person's individual characteristics (such as reputation or wealth) and in strict accordance with the rule of law (Frederickson et al. 2016, chapter 2). Moreover, a good deal of public administration theory implies that bureaucracy is indispensable for running large-scale public programmes. Bureaucracies excel in 'memorising' past activities, which hypothetically allows for learning from previous experiences and making wise(r) choices in the future (Grönroos 2019). Last but not least, bureaucracies can be held accountable to a larger stakeholder community, including a democratic polity. These features make them a fundamental prerequisite of the implementation of modern values – notwithstanding the paradox whereby some public organisations do the opposite.

Hence, concerning values inherited from the Enlightenment, modern institutions and organisations have inconsistent traits arising from distinctive social dynamics. Power-seeking social forces permanently challenge such institutions and organisations, as well as the values attached to them. At the same time, organisational settings entrusted with translating these values into practical activities run the permanent risk of being fraught with idiosyncrasy. They become preoccupied with means rather than with ends, or with concerns that deviate from their initial mission. This ambivalence will be illuminated in greater detail later. More generally, recent history tells us that emancipatory ideas associated with modern thought are repeatedly at stake when collectivities of human beings (re)shape regulatory frameworks and organisational settings, including when devising welfare arrangements (writ large). In the current European scene, some emancipatory values prove to be quite vibrant, even as agencies that specialise in putting regulatory frameworks into practice have become major stakeholders of the above ideas. Moreover, newcomers enrich the established landscape, as illustrated by the international rise of non-governmental organisations (NGOs) seeking to bring human rights concepts to fruition internationally. All in all, it appears that modernity, while being tension-ridden from its very beginning, perseveres and has become more dynamic, and even more radical, in certain dimensions (Giddens 1990: 51). Simultaneously, orientations associated with the imaginary of human progress seem to be ailing since the transition to the twenty-first century, even as some features of contemporary social life put these orientations under permanent strain. The challenge to tackle in the following discussion consists of disentangling relevant processes and mechanisms in an area that is particularly critical to human progress, that is, organised welfare provision. As we shall see, a 'cultural political economy' approach proves useful for this purpose.

## 2. Narrowing the focus: democratic capitalism and welfare state theory

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### 2.1 ENCULTURED FORMATIONS OF CAPITALISM AND DEMOCRACY

As set out in the Introduction to this book, the compromise between capitalism and democracy has often been deemed the lifeblood of European modernity (Streeck 2013; Stråth and Wagner 2017; Azmanova 2020, chapter 4). Scholars from various backgrounds have considered this compromise as a functional prerequisite of advanced nation-states that feature a complex division of labour. Sociologists – for instance Weberians or proponents of social system theory – have often argued that this complexity resides in an uneasy co-existence of different social spheres, each guided by specific references which are difficult or even impossible to keep under control by a single focal coordinator. Many political economists, on their side, contend that capitalism needs political intervention in order to function in economic terms (for a classical version of this argument, see Dahms 2000), given extant tensions between productive and reproductive work, mass consumption and (more or less) concentrated private property, and the ambitions of self-direction and the requirements associated with commodified labour. This begs the question as to how the above compromise has come into being and how it can survive.

In the face of this ‘crunch’ question, major strands of social theory emphasise the role of economic issues. In typical Western societies, so the argument runs, owners and shareholders are rent-seeking actors while other groups try to make the most out of their social position, for instance as a state clerk or waged worker (Elster 1989). In this reading, the interplay of economic interests, and economic transactions more broadly, is the backbone of modern social life – which implies that the above compromise between capitalism and democracy revolves around these interests and processes. However, it is common sociological wisdom that interests are imbued with meaning (Spillman and Strand 2013). For example, ‘making money’ is a cognitive orientation coming into play when human beings strive for self-actualisation. According to Max Weber (1930 [1904–5]), this orientation turned into a moral foundation of Western capitalism, as a modern value pervading capitalism’s societal order along with some other normative predispositions (Waters and Waters 2015). In view of that, a good deal of social theory dealing with modernity conceives of these predispositions as a cultural settlement. From this vantage point, any economic system has non-economic underpinnings with ideational foundations that prompt mental processes that, for instance, can revolve around post-materialist orientations. This also pertains to dynamics of interest intermediation in the political system. Thus, representative democracy is a normative concept for the coordination of (mass) communities, existing besides other models and in different forms. In a nutshell, both the economic and the political organisation of society are infused with cultural refer-

ences which can differ across world regions and evolve over time. Consequently, democratic capitalism cannot be reduced to its mere economic functionality. This is easy to discern when considering contemporary nation-states that lack (Western style) democratic institutions, such as China, or when comparing the political culture of the United States with, say, the set of values guiding Nordic countries. Both capitalism and democracy are rooted in systems of meaning (Granovetter 1985; Hollingsworth and Boyer 1997; Ghezzi and Mingione 2007), with the wider societal order being the outcome of collective sense-making processes (Offe 1996). Hence, in an analysis of welfare state arrangements that seeks to grasp their evolving character, both the influence of economic dynamics and the role of ideational factors deserve particular attention.

### **Embedded Capitalism**

Concerning capitalism as an economic system, it appears safe to contend that it has come to adopt a similar ‘temperament’ across Western Europe, particularly with regard to recent dynamics of change. It is commonplace wisdom that, historically, the capitalist economy developed into a highly productive arrangement susceptible to satisfy many people’s appetite for material wealth and to stimulate human effort more generally. Concurrently, capitalism has also fuelled a great deal of social disruption, putting strain on institutions meant to ‘pacify’ its inner forces – which have been a big issue in the social sciences. Thus, the work of Karl Marx provided an early account of the crisis-ridden character of industrial capitalism and provides an approach that has inspired more recent scholarship dealing with erratic economic agency and the ensuing disruptive dynamics over the last 50 years (Lash and Urry 1987; Sum and Jessop 2013; Streeck 2013; Dörre et al. 2018). Following this literature, more recent movements of change include the transition to managerial capitalism (Chandler 1984) and the fall of stakeholder governance in private corporations (Morgan 2016: 204), paving the way for new patterns of business-making and economic rule (by shareholders). This is paralleled by the upswing of the service economy and a ‘prodigious expansion of capital into hitherto uncommodified areas’ (Jameson 1991: 35ff; Fraser and Jaeggi 2018). Such dynamics are often deemed to be fuelled by both an unleashed globalisation (Hay and Wincott 2012; Radice 2014; Chase-Dunn and Lerro 2016, chapter 19) and a worldwide proliferation of sweeping new (digital) technologies which, some scholars assume, will lead to a dark age of human powerlessness (Bridle 2018). At least, a ‘greater ease of communication affords giant corporations the ability to manage and coordinate far-flung operations’ (Porpora 2014: 84). Moreover, economic change has been found to urge the current generation of workers to be ‘reflexive’ at any moment, as ‘routine life paths are being disrupted or annulled in multiple ways’ (ibid: 80). An exponential rise of knowledge based on fluid immaterial ideas (and their permanent manipulation by powerful social groups) seems to breed new representations concerning how individuals can – and should – liaise with both the economy as well as fellow citizens. This is viewed to connect with new modes of consumption and related forms of selfhood, altering the way people make use of material resources in a never-ending pursuit of self-realisation (Bauman 2007a, chapter 5). Irrespective of whether this is the full story about recent dynamics in Western capitalism, it stands to reason that changes in the functioning of the economic system have (had) deep implications for social development.

The fact remains, however, that capitalism is, and can be, culturally embedded in multiple ways. At least, this is the message conveyed by the scholarship on historical institutionalism (Mahoney and Thelen 2010), the literature on varieties of capitalism (see for instance Hall and Soskice 2001; Schröder 2013) and important strands of economic sociology, for instance, those exploring the variegated social meanings of money (Zelizer 1989). British scholars Ngai-Ling Sum and Bob Jessop, delineating what they refer to as ‘cultural political economy’, make the case for capitalistic practice being interwoven with complex cognitive orientations circulating in its wider environment. During the recent period of capitalism, so their argument runs, ‘the profit-oriented, market-mediated logic of differential capital accumulation seems to be becoming more dominant’, but the economic system remains ‘structurally coupled’ to other social spheres that have ‘their own operational logics’. This particularly pertains to the life-world of citizens, ‘formed by various social relations, identities, interests and values’ (Sum and Jessop 2013: 175, 176). The two authors conclude that the economy ‘cannot be adequately conceived (let alone managed) as a “pure” economic sphere that reproduces itself in total isolation from the non-economic’ (ibid: 181). Rather, cultural dynamics – that is, the sense-making of people – are crucial for the development of capitalism and its institutions.

A case in point is the institutional design of markets which, ‘driven by individual calculations of utility’ (Streeck 2012: 2), have grown into a major catalyst of Western capitalism (Screpanti 2001: 215ff). Even in modern societies, however, the above calculations have non-economic underpinnings. Thus, they may comprise an interest in social security as defined above, that is, the expectation of both secure income streams and reliable protection against the vicissitudes of human life. These are guarantees that markets are unable to provide and must be enabled by special institutions, operating as a ‘mediator between capitalism and democracy’ (Shionoya 2005: 227). The collective interest in these guarantees is cultural in kind and reflects a distinctive set of collective preferences which often develop incrementally and in group-specific versions. As discussed earlier, the rising interest in long-term security is viewed to be one reason why (many) modern societies have invented devices for organised welfare provision (Kaufmann 2001). These devices embody distinctive cultural arrangements, for instance the notion of ‘productivist dualism’ (Nachtwey 2018: 12) that has taken shape in many twentieth century welfare states and combines the institutionalisation of waged labour along with the management of social risks under the responsibility of specialised organisations.

In part, this dualism builds on normative orientations grounded in Enlightenment ideas and has been a source of inspiration for the vision of social modernity. Austrian historian Karl Polanyi (1944) once argued that Western capitalism came to institutionalise both a market-oriented commodification of human work and measures of de-commodification aimed at avoiding disintegration in ‘the cultural environment of the social subjects’ (Smart 2003: 30). Again, economic relations interrelate with non-economic dynamics. While the devices used to de-commodify labour – such as social rights to education and healthcare – contribute to (re)produce human capital (and thereby its commodification), they also invite people to act upon their social aspirations and make their own decisions, rather than remaining at the mercy of market dynamics. In other words, (partial) de-commodification provides wage-dependent workers with opportunities to make up their minds and carve out zones of self-discretion – which may constantly elicit efforts of creative sense-making.

Overall, past historical dynamics suggest that the Western economy and its regulation constitute a contradictory and open terrain (Hardt and Negri 2017; Shinoya 2005: 133–77).

From a ‘longue-durée’ perspective, capitalistic agency has become ever more sophisticated throughout the modern age, spilling over into an increasing number of life situations (Rosa et al. 2017). Today, both the spirit of fair competition and the ethos of innovative entrepreneurship figure as popular moral ingredients of various social spheres, all infused with the ‘culture of the market’ (Smart 2003: 80–84). This also applies to areas of organised welfare provision (Bode 2008a). Against this backdrop, the previously mentioned social compromise, involving a ‘dynamic complex of institutional constraints and opportunities, expectations (and) rights’ (Streeck 2012: 3), can change its colours. The ‘social cohesion tradition’ in twentieth century democratic capitalism (Taylor-Gooby 2016: 713) has entailed ‘physical, social and economic infrastructures ... based on citizenship entitlements, not market power’ (Morgan 2016: 201), yet, at the same time, regarding the history of Western societies, these infrastructures proved to be fragile in many instances (Sum and Jessop 2013: 33; Kessler-Harris 2009). Hence the above compromise was never carved in stone.

### Encultured Democracy

It is crucial to see that the contours of the compromise discussed above take shape in the sphere of democratic politics. Indeed, European modernity has given birth to the siblings of economic liberty and mass democracy. Democratic institutions are often understood as ‘an organic outgrowth of marketization’ (Bloom 2023: 18), yet they also have cultural underpinnings inspired by emancipatory ideas. Thus, arrangements found in a democratic polity are often viewed to build on a distinctive ‘civic foundation’ (Shionoya 2005: 3) which emanates from the collective effort ‘to realize substantive values’ and ‘to ensure the principles of justice’ (ibid: 211–12). This observation signals a nexus between democratic sense-making and the vision of social modernity, which both impact upon the spread or decay of inherent emancipatory principles. This nexus is certainly multi-faceted. Like an economic system, democracy can be *encultured* – or *embedded* – in various ways. A key issue here is the architecture and traditions of what is commonly labelled civil society – that is, a social sphere in which human beings convene to develop practical initiatives and solutions to tackle collective problems (Horch 2018; Hwang and Suárez 2019). European political systems have come to involve this sphere in their routine proceedings, albeit in different ways. Thus, ‘mediating between the differentiated spheres of the state and civil society’ (Elliot and Lemmert 2014: 179ff; 181), various organisations from this realm are involved in ‘checking state power’ (Ehrenberg 2017: 277) and taking action on behalf of larger constituencies (Klein and Lee 2019).

In the understanding of scholars influenced by the work of Habermas (1984 [1981]), such organisations show a potential to contribute to a well-ordered communication among (groups of) citizens who are keen to engage with common causes and ways to strike a balance between discrepant concerns and interests. To be sure, critics bemoan that this worldview is overly optimistic, given that the role of civil society in the political sphere may adopt many different forms. Thus, although viewed as forming the front stage of democracy, organisations operating in this sphere are often observed to defend concerns of small homogeneous collectivities (Bernstein 2010). Such entities, when fuelled by group interests or a ‘clan logic’, may take action against other collectivities – which has been discussed, for instance, in work on recent populist movements (see Arato and Cohen 2017). In turn, more emancipatory civil society organisations may find their attempts to exert influence impeded, either by other (more)



powerful social forces or because they suffer under unfavourable circumstances such as an impoverished, stigmatised or passive membership. Habermas himself once argued that, following the transformation of the public sphere and the rise of the ‘intervention state’ during the nineteenth and twentieth centuries, political processes in the Western world were rarely in tune with the idealistic model sketched above, given that public bureaucracies tended to ‘colonise’ civil society (Habermas 1989 [1962]).

In this reading, the state administration taking shape in the twentieth century became more of a transmission belt of bureaucratic rule and economic rationality, with each pervading the life-worlds of individuals (for a more recent version of this account, see Alexander and Fernandez 2021). Likewise, interest groups such as trade unions, professional associations, or lobby organisations have often been accused of advocating for the concerns of powerful minorities (see Holyoke 2017 or Scott 2018). More generally, it has been argued that democratic life, being entrenched in the political economy of Western capitalism, is infused with hegemonic world-views held by corporate elites and their political allies who inject the logic of micro-economic rationality into processes of public opinion building (Perrow 2001; Paster 2015; Farnsworth 2021a). To the extent that this logic infiltrates the deeper symbolic textures of human interaction, the evolving polity of modern societies sits uneasily with the democratic promise inherent in Enlightenment thought, that is, the idea that collectivities mould their common destiny by socially balanced agreements based on shared values.

At the same time, scholarship on dynamics in Western democracies suggests that social forces may always counteract such tendencies – and have succeeded in doing so on many occasions in recent history. Relevant frameworks of modern social theory (including the early Frankfurt School) imply that Western modernity constantly creates space for creative social action, including in the political sphere. Under certain circumstances, this space can be used to unfreeze arrangements made by powerful elites and to open up opportunities for the re-appropriation or further development of modern institutions. In his later work, Habermas acknowledges that advanced modern societies continue to produce occasions for this re-appropriation, given the democratic potential of civil society as a sphere in which human beings seek to deliberate on public affairs (Habermas 1992; Grewal 2019). Other scholars echo this when arguing that, in Western societies, civil society may constitute an independent arena for public discourse (see Ehrenberg 2017). In this space, it is contended, the engaged parties ‘have a moral purpose that fuels their orientation toward problems and people outside of their organisation’ and foster the proliferation of ‘normative claims about a common public good’ (Lang 2013: 12; 13). The approach of Italian philosopher Antonio Gramsci, while being rooted in Marxist thinking, builds on this when conceiving of civil society as an independent factor in the development of modern capitalism (Brighenti 2019).

From these perspectives, civil society organisations may occupy social spheres which previously have taken shape under the control of the state or private business, through a process of ‘infiltration’ that has a potential to civilise operations of both public authorities and private firms (Klein and Lee 2019). In this context, civic movements may promote what German sociologist and philosopher Axel Honneth refers to as the ‘politics of recognition’, responding to experience with disrespect or humiliation in the wider society (Honneth 2004; Schmitz 2019). Political action then builds on morally grounded sense-making geared towards making citizens carve out an overarching consensus or shared normative principles. Under such circumstances, civil society organisations can vitalise public deliberation and appease conflicts in larger

collectivities – and thereby make ‘democracy work’ (Putnam 1993). This also pertains to the global level, as exemplified by the dynamism of the so-called ‘non-governmental organisations’ (NGOs) (Kellow and Murphy-Grefory 2018).

More generally, the debate on the role of civil society in the Western world implies that democracy may live many lives and can adopt different traits (Bächtiger et al. 2018). It is embedded in belief systems that are based on distinctive understandings of how politics (should) work and which constitute a specific political culture. Thus, there is ample evidence for democratic processes being infused with nation-specific patterns of collective sense-making (for many, see Almond and Verba 1996 [1963]). Basically, political culture can be defined as ‘a process in which political meaning is constructed in the interplay between the attitudes of individual citizens and the language and symbolic systems in which they are embedded’ (Da Silva et al. 2015: 1120). Related dynamics vary concerning, for instance, the ‘felt’ distance between citizens and political representatives, or a polity’s proclivity to foster active participation in public decision-making. From this perspective as well, meaning matters – simply because specific belief systems can make a difference, both between political communities or over time. Importantly, the cultural framing of democratic rule materialises in how citizens think about the social order they inhabit. According to Sum and Jessop (2013: 149), hegemonic world-views and related semantic conceptions connect to ‘social fixes, rooted, for example, in institutionalised compromise, and spatio-temporal fixes that displace social problems elsewhere and/or defer them into the future’. From this vantage point, a given political culture can betray the idea of democracy as it had been encapsulated in the Enlightenment project.

In any case, the uneasy compromise embodied by the assemblage of modern societies in Western Europe connects with encultured formations of both capitalism and democracy. These formations are embedded in distinctive sets of orientations which can change over time, and this also includes shifts within the realm of politics. It is certainly crucial to understand how these orientations relate to demands from those social forces that are dominating the economic system. This, for instance, pertains to those ‘endemic pressures’ for regulatory liberalisation which many political economists used to associate with late twentieth century capitalism (see Streeck 2012: 7). At the same time, in twenty-first century Western Europe, much is possible concerning the sense-making around such pressures. Effects of sedimentation and routinisation may matter greatly in related disputes, as they can allow people to forget or rediscover ‘the contested origins’ (Sum and Jessop 2013: 163) of current arrangements and their wider purposes. The overarching message to infer from all this is that ideas can make history and that the analysis of modern institutions or organisations cannot operate without an account of the open and dynamic character of cultural factors in both the economic system and the modern polity.

### **Culture *Against* the Welfare State?**

As noted, distinctive cultural orientations have underpinned the institutional set-up of Western societies – and some of these appear as expressions of a wider-ranging vision, namely, that of social modernity. However, scholarship dealing with recent (and ongoing) social change in the Western world suggests that cultural developments may also run counter to modern thinking and that particular vision. This first of all holds for the narrative of reflexive modernisation as

outlined above. A major contention of this narrative is that ‘post-industrial’ societies undergo a far-reaching process of individualisation prone to undermine collective regulations inherited from the industrial age (Bellah et al. 1985; Beck et al. 1994; Fevre 2016; Siza 2022). Among other things, this process is seen to materialise in a widely shared opinion that ‘each person has a unique core of feeling and intuition that should unfold or be expressed if individuality is to be realized’ (Bellah et al. 1985: 333–4). According to Reckwitz (2021), this ‘expressive individualism’ has gained ever more traction in the early twenty-first century. Human behaviour, so the argument runs, is governed by personal orientations under rapidly changing circumstances. Loyalty to modern institutions becomes a private decision which urges citizens to judge each institutions’ value individually. Relationships between citizens appear ever less impregnated by binding norms or uncontested agreements (Mau 2015), with human action being ‘contingent on a continuous imagining, gauging, and negotiating of (im)possible futures’ (Heinlein et al. 2012: 11).

Western societies influenced by this imaginary are frequently deemed to have lost part of their collective ‘DNA’ and, by extension, some of their potential to civilise the economic system. According to Bauman (2007), whose work amalgamates postmodern thinking and the diagnosis of reflexive individualisation, the polity of advanced societies (i.e., those of the late twentieth century) is void of shared references. The very idea of seeking more comprehensive binding agreements is abandoned as citizens are ‘no longer able to conceive of any benefit they could derive from joining forces’ (Bauman 1995: 272). As a result, this idea is replaced by gestures ‘expressing and promoting the diversity of fate’ (ibid: 265; 271). The ‘fading of human bonds and the wilting of solidarity’ (Bauman 2007b: 24) undergirds political ambitions to ‘dismantle, deregulate, dissipate the once solid ... frames in which life-concerns ... were inscribed’. Stråth and Wagner (2017: 179) concur with this diagnosis when stating that various movements of de-institutionalisation have tended ‘to incapacitate collective action’ and to discredit the above agreements ‘in the name of some generic concept of equal individual freedom’. This concept, some scholars add, is often shaped by a media-influenced construction of ‘dream values’ spilling over from business sectors to the private life-world (Streck 2012: 12), even as market ideology – in a context of a de-regulated world economy – is ‘politically supported by cultural fantasies’ as discussed by Bloom (2023: 7, in referring to liberal norms of global fairness).

Drawing from this reading, the societal order taking shape during the late twentieth century cherished freedom from connectedness under circumstances of permanent ‘multitasking’, whether at work or in the private sphere. In this context, individualisation is viewed as increasing people’s ‘tolerance for inequality’ (Mau 2015: 13) and making people more self-reliant because it seemingly offers them a greater range of options – particularly when it comes to shaping a life course, forging aesthetic preferences or developing ‘personalised’ lifestyles (Reckwitz 2021). This echoes observations from those camps of critical theory that highlight the spread of consumerist values and commercial spirit within ‘mature’ capitalist economies. The ‘increasing interpenetration of culture and economy’ (Smart 2003: 11) is assumed to derive from a business-driven culture industry ‘colonialising’ the mindset of contemporary citizens, along with modes of consumption that absorb the latter’s mental energy (ibid: chapter 3). At the same time, the above processes are assumed to produce new vulnerabilities which may impede citizens from living a truly self-determined life. Thus, with disrupted biographies, human beings run the risk of permanent drift, as it becomes hard to devise a consistent ‘life

story' and to keep on track under the above conditions (Sennett 1998). Contemporary work settings, it is observed, are driven by individual 'desire' and 'passion', rather than agreed or enforced collective norms (Boltanski and Chiapello 2018 [1999]), with egocentric mentalities as a result. A similar reading can be found in work inspired by Foucauldian thinking, observing the emergence of the 'entrepreneurial self' (Bröckling 2016 [2007]) as a wide-spread attitude within advanced modern societies. It is argued here that a distinctive set of orientations has pervaded the mindset of contemporary individuals and prompts them to permanently search for options to improve, excel and become more competitive. The induced 'governmentality', so the argument runs, is likely to undermine commitments to seeking socially balanced agreements in organisational settings and beyond.

More generally, in the contemporary Western world, an all-embracing commercialisation of social life is seen as nurturing a new 'reflexive attitude towards *the self*' in relation to the future and provoking 'discursive shifts within the political culture' (Farrugia and Woodman 2015: 640), with a strong impact upon processes of interest intermediation at the society level. Such observations culminate in the diagnosis of capitalism developing with a new ideological groundwork since the end of the twentieth century. This groundwork is viewed as featuring an unprecedented break-up of human identities and the collapse of any active sense of historical memory (Jameson 1991: 272), with modern citizens becoming indifferent to the purposeful collective regulation of public affairs. Related observations make sociologists wonder whether contemporary society is 'loosing something of very essence of the modern project' (Maccarini 2014: 54). Under the aforementioned circumstances, so the argument runs, humanity may, in contrast to the prophecy of Enlightenment, no longer be impregnated by the idea of a common destiny.

A culture-driven decay of modern values is also implied by an almost diametrically opposed verdict which observes the comeback of pre-modern collectivism. This movement, often depicted as 'cultural backlash' (Wiatr 2019; Norris and Inglehart 2019; Gamble 2019; Iversen and Soskice 2019; Bloom 2023), is seen to materialise in the rise of political authoritarianism and the upswing of right-wing populist movements in Western Europe and elsewhere, as briefly discussed in the Introduction to this monograph. The respective verdict differs from the narrative of thriving individualism in that it assumes an increasing popularity of standardised patterns of human behaviour or reasoning. Larger sections of the population, it is observed, have come to find such patterns indispensable for the sake of ensuring a community's social cohesion. Given that current Western societies are highly diverse in terms of cultural orientations, this new collectivism is viewed to be highly selective and related to imagined communities exercising social closure (Anderson 1991).

At a global scale, pre-modern collectivism is often seen to materialise in movements of religious resurgence and desecularisation, sometimes side by side with a 'marketisation of religion' (Gauthier and Martikainen 2018). In this context, allegiance to Western denominations is observed to be played out against non-Christian faiths (Berger (2013 [1999]) and to lead into the rise of radical traditionalism, most prominently among people living in parts of the Global South and those emigrating from there to Western Europe (Kirby 2020). Within Western countries, the (partial) proliferation of traditionalistic orientations is sometimes viewed to be driven by grievances against moral universalism, and deemed to undermine the ideational foundations of 'indigenous' communities and their established lifestyles. In twenty-first century Europe, major catalysts in this process arise from xenophobic sentiments which translate into

political support for ‘welfare chauvinism’ (Taylor-Gooby 2016), that is, the idea of denying non-native citizens (typically new immigrants or refugees) access to typical welfare benefits and public services. Such sentiments are often attributed to a more fundamental ‘breakdown of cross-class and cross-space interdependencies’ (Iversen and Soskice 2019: 223), which makes the cultural backlash a serious challenge to the hegemony of modern thinking.

It is often argued that this form of cultural backlash is fuelled by politico-economic developments, such as an ‘overaccumulation of financial capital’ in corporations that ‘benefit from a corrupt relation with political authority’ (Sum and Jessop 2013: 419). Moreover, neoliberal welfare retrenchment and the induced ‘race to the bottom’ are accused of propelling the above forms of (exclusive) collectivism. Bloom (2023: 2; 9) argues that ‘the more economically liberal a country becomes, the greater its reliance on authoritarianism’, in part because the citizenry is faced with a culture ‘with relatively little political debate or possibility of change’. While this observation focuses on transition states such as Russia, China or Mexico, it resonates with accounts stating that Western countries are faced with a declining trust in political institutions and public governance (Crouch 2004; Daxecker 2023).

Proponents of this tenet point to reduced turnout rates in elections, increased social selectivity of political participation, and a rejection of majoritarian voting systems in major Western countries. Perceptions of a growing influence of business in politics add to this (Crouch 2004; Garsten and Sörbom 2017) and chime well with the much-discussed demise of the classical political left in many parts of Europe (Manwaring and Kennedy 2017). Western citizens, it is contended, perceive that ‘the political manageability of democratic capitalism has ... sharply declined’ (Streeck 2013: 281) and that those post-war institutions which once ‘created a shared community of fate amongst social actors no longer serve this purpose’ (Morgan 2016: 211). Such ‘democratic distemper’ is viewed as breeding apathy and discontent especially in countries exhibiting rising social inequality (Schäfer 2013: 184; 188). In addition, the ‘old middle classes’ are found to have become suspicious of the social contract that had once made them one of the lynchpins of their country’s economic and political life (Iversen and Soskice 2019, chapter 5). An overarching implication of all these observations is that democracy – as a model for collectively organising public affairs – is impeded in its functioning or even becomes discredited. To the extent that (part of) the Western population is no longer convinced by the institutional compromise depicted above, the modern idea of mediating diverging interests and values through open deliberation is likely to become ineffective.

A further – albeit evergreen – narrative of cultural change unsettling modernity is the one dealing with the effects of rationalisation. As mentioned earlier, the role of rational thinking has been a building block of theories dealing with the culture of modernity. Drawing on Max Weber, German sociologist Walter Lepsius (2017) has described this process as a movement during which both procedural effectiveness and assertiveness of legal rationality criteria become guiding landmarks for the governance of public institutions and social life more generally. However, this movement has often been assumed to ‘contaminate’ human orientations inspired by Enlightenment concepts (Mitchell and Simmons 1994). The increasing juridification and bureaucratisation of social relationships, so the argument runs, makes institutions neglect their proper mission and overlook human needs – which may also affect the character of welfare arrangements. This mismatch is sometimes attributed to the ‘spirit of scientism’ (Oram 2016: 17) pervading all spheres of modern life, including politics. Concerning the

latter, this spirit has been assumed to make public opinion-building ‘expertocratic’ and to transform policy-making into mere technical operations (Crouch 2004).

In a related way, scholars have elaborated on the spread of business rationality within various non-economic sectors as a distinctive form of modern rationalisation. Endemic to instrumental thinking driven by capitalistic goals, this rationality has recently been found to infiltrate the culture of spheres from which they had been absent in earlier times. Among other things, this movement is seen to pose challenges to democratic forms of governance in the realm of civil society. Scholars dealing with this realm argue that many civil society organisations have come to adopt routines endemic to the world of private business (Maier et al. 2016; Myers 2017; Bromley and Meyer 2017). Lang (2013: 5; 7) argues that fundraising issues and the participation in formal politics (that is, institutional presence) ‘occupy a much more substantial part of NGO activities than public advocacy’ and entail a ‘pull to professionalize’. This is viewed to induce a dwindling of civic values and to propel an ‘orchestration of public involvement through highly managed activities’ (ibid: 121). Other scholars submit that ‘business-style’ management in non-profit and non-governmental agencies involves a ‘hollowing out’ of civic forces defending common causes (Aiken and Taylor 2019). This chimes well with the observation of an ‘increasing fuzziness of the dividing lines between the public and the private, and the individualisation of choice by the notion of individuals as consumers rather than citizens’ (Mayes and Michalski 2013: 8). The (assumed) result is associational life becoming perverted by instrumental mentalities which arguably threaten civil society’s potential for contributing to socially balanced agreements in a given nation state.

To sum up, a whole raft of scholarly work suggests that, in the times we inhabit, cultural factors constrict the influence of emancipatory Enlightenment ideas and, by extension, the mission of institutions and organisations ‘allied’ with (the vision of) social modernity. Inherent processes are viewed to align with shifts in collective sense-making that impinge on a society’s cultural repertoire when it comes to forging agreements on public affairs writ large. Thus, growing beliefs in the virtues of nativist communities and in ethnic demarcation run counter to the imaginary of universal human progress, even as lost faith in the utility of entrenched political institutions seems to translate into collective apathy and erratic sentiments.

However, in the light of the strands of modernisation theory reviewed above, cultural factors can, and do, have inconsistent effects. The rise of individualism is a case in point. While Western citizens – amid ongoing modernisation – seem to have become more utilitarian when dealing with political issues and welfare institutions, they may nonetheless be aware of the institutional prerequisites of a more individualised life course, that is, choice options in the occupational or familial sphere (concerning this ambiguity, see Achterberg et al. 2013). Thus, related arrangements established at earlier stages of democratic capitalism have remained quite popular, for instance state-governed healthcare or public schooling. As Canadian political scientist Daniel Béland (2010: 105) suggests, public policies concerned with the above requisites reflect contradictory tendencies, ‘moving in several directions at once’. Hence, major public institutions that incarnate modern universalism continue to exist and impact upon human life courses including, for instance, via comprehensive entitlements in the previously mentioned areas and elsewhere. The strong response to the Covid-19 pandemic indicates that the respective commitments maintain solid foundations in Western Europe.

What is more, the recent history of modernity suggests that new patterns of collective sense-making can surface as a reaction to notorious or unprecedented barriers to make

Enlightenment thought matter. As proponents of the reflexive modernity thesis point out, citizens facing threats to past achievements may, and often do, initiate a counter-movement. Modern people, it is put forward, are able to act on perceived challenges, ‘not in any predetermined way but with the creativity that is intrinsic to human agency’ (Porpora 2014: 85; 86). This even holds in a context in which pre-modern collectivism flourishes, for instance under the influence of right-wing populism of which the increased international influence involves a clear setback on the way to more universal human rights. While populist movements often cherish, and even aggressively defend, exclusive welfare state entitlements, their claims may encourage other sections of the population to (re)activate universalistic ideas and, after all, make these entitlements more comprehensive once these sections form a democratic majority. Moreover, welfare chauvinism is not necessarily a destructive charge against all elements contained in the social contract established during the industrial age. Thus, in various Western countries, the preservation of welfare state entitlements has been high on the agenda of new right-wing movements, which indicates that the latter need to defend these entitlements to seduce voters (Röth et al. 2018). Hence, notwithstanding the xenophobic background of this agenda, a consideration for ideas contained in the vision of social modernity nowadays seems to be ‘a must’ once a political formation is striving for power.

By and large, social movements in the Western world – however small-scale and episodic they may appear – maintain a potential for pushing emancipatory Enlightenment concepts further. The recent history is replete with examples of citizens defending humanitarian values (Buechler et al. 2000). A case in point is global action against climate change and its social repercussions. More generally, scholars exploring the evolving polity of advanced welfare states accentuate that, over the last decades, the latter have seen an expansion of civil society in various areas. An indicator used to corroborate this observation is the sheer number of non-profit organisations and the growing range of issues they become involved with in day-to-day politics (Lang 2013). In many parts of the Western world, such organisations have ‘infiltrated’ the state administration ‘without necessarily compromising their agenda’ or ‘their self-governing capacity’ (Klein and Lee 2019: 70ff; 80; 81). It is also noteworthy that initiatives defending utopian projects have not died out within this universe of actors (Hardt and Negri 2017; Cohen et al. 2017; Atzmüller et al. 2019).

Hence, despite the much-debated regressive tendencies in parts of the Western polity, and regardless of cultural pressures arising from exacerbated individualism, consumerism or welfare chauvinism, there is no reason to presume without further ado that socially progressive ideas will disappear from the horizon of contemporary European societies. The discussion up to this point implies that, concerning cultural dynamics, different movements seem to operate in parallel. Accordingly, the cultural anchorage of the vision of social modernity may be inconsistent and stronger in some respects rather than in others. For instance, this vision continues to have a huge impact in the debate about gender issues while being more fragile concerning the (re-)distribution of material wealth. Likewise, rationalism and scientism remain very important and matter greatly in the twenty-first century, yet the ways they impact upon contemporary institutions and organisations is open to further scrutiny.

## 2.2 POLITICAL ECONOMY PLUS CULTURE – EVOLVING FOUNDATIONS OF MODERN WELFARE ARRANGEMENTS

The discussion thus far reveals that modern values are often vague and open to interpretation, even as progress in making them operational has been patchy, unsteady and ephemeral in many instances. Against this backdrop, it appears hazardous to subsume the many facets of recent human history under one sole buzzword – which also pertains to what this book refers to as social modernity. However, in exploring the actual influence of emancipatory concepts rooted in Enlightenment thought, things seem less difficult to disentangle once the focus is placed upon concrete institutions and organisations with a potential to bring this thought to fruition. Hence, probing into the latter's recent development throughout Western Europe can help elucidate the way current societies can, and do, influence the well-being of citizens beyond the outcomes that arise from mere economic transactions. This particular realm comprises various areas of what this book refers to as *organised welfare provision* and also the 'makers' of welfare, that is, agents operating in areas of social administration, including those outside of public sector contexts.

The related assemblage has been an important subject matter in scholarship dealing with 'modernity and the state' (Offe 1996). It also figures as a key building block in what Stråth and Wagner (2017: 157) label the 'organisation of modernity'. Historical studies into the modernisation of Western societies devote much attention to public policies seeking 'to establish a balance between social interests drifting apart' (ibid: 148–9). The respective literature reveals how these policies gave birth to a set of institutions commonly referred to as the welfare state – that is, a large array of supportive or protective welfare arrangements under the control of public authorities. These arrangements are commonly perceived as contributing to both enhancing the well-being of 'vulnerable groups in society and offering or facilitating social protection for all' (van Kersbergen and Vis 2014: 2). They comprise variegated frameworks and provisions, among which compulsory social security schemes, means-tested welfare benefits, labour law and state-orchestrated (e.g., Keynesianist) economic policies all aimed at satisfying various stakeholders, including capital owners (ibid: 164ff).

In the context of this book – and set against the backdrop of the theoretical debate about the ambivalences of modernity – the question arises as to how prominent welfare state theories comprehend the complex chemistry of the above arrangements, meaning the mechanisms that make the latter take shape and evolve. A good deal of the respective scholarship understands the modern welfare state as a lever for civilising the capitalistic economy and for ensuring what sociologists refer to as *social integration* (for an overview, see Béland 2010: 82ff). Related to this, different purposes of welfare arrangements are under debate, among which are the appeasement of (group) conflicts, the creation of mass loyalty to the existing societal order, and expectations concerning the participation of the wider population in political life. Moreover, attention is paid to the many ramifications of welfare state activities, for instance concerning how stakeholders (feel they) relate to fellow citizens and larger communities, including a regard for their status in the wider society. As 'status orders are typically inert in comparison to free markets', Streeck (2012: 8) notes, Western citizens have often been led 'to call for *political* intervention to stabilise their social existence'. Hence, public regulation is expected to moderate the production of welfare by economic transactions and becomes politicised in these terms.



Based on this latter observation, some strands of welfare state theory subscribe to a political economy perspective (Sum and Jessop 2013; Ferragina 2019; Palley 2020). A major thread in the respective literature is that welfare provision, in the above sense, is ‘tension-ridden’ as a matter of principle. On the one hand, capitalism is assumed to need welfare state institutions to enable it to function smoothly. On the other hand, in this economic order, inherent dynamics are seen to be crisis-laden, and so are the social relations related to these institutions. Critical political economists suggest that there is ‘an endemic and essentially irreconcilable conflict between capitalist markets and democratic politics’ (Streeck 2013: 263), in part because ‘the wealthy continuously look out for new ways to leverage their advantages’ (Morgan 2016: 202) while others oppose such initiatives on various occasions. This resonates with the ‘power resources approach’ (e.g., Stephens 1979), which argues that the specific character of a given welfare arrangement is predicated on certain social groups being able to defend their interests more effectively than others, including by democratic means. While this may apply to various sections of a country’s population, the emphasis in the political economy literature often lies in the role of the economic elites and the ‘advantages to capital’ (Hay and Wincott 2012: 70). Examples include policies stimulating the aggregate demand across business cycles to attain macroeconomic effects; welfare state interventions aimed at developing and preserving a healthy, educated and contented workforce; and investment in childcare facilities or further measures likely to boost human capital and labour-market participation.

To be sure, most political economists would acknowledge that social policies are driven by a mix of objectives. Some of the latter are consonant with the previously mentioned normative agendas of modernity, for instance the pledge to reduce poverty, commitments to promote equality of opportunity or the promise to enhance human autonomy. That said, the compatibility of such policies with economic forces and dynamics is fundamental to this body of theory. Welfare state intervention is expected to contribute to both social stability and economic prosperity which, in turn, are assumed to yield resources needed to fund welfare programmes (Hay and Wincott 2012: 43). In this vein, programmes launched in the context of globalising capitalism have often been viewed to have ‘competitiveness-enhancing’ consequences for Western Europe (*ibid*: 123ff), rendering it unlikely that this context undermines welfare state institutions on a greater scale. Rather than facing ‘a vicious war of competitive undercutting’, so the argument runs, Western welfare states survive ‘on the basis of quality, reputation and product innovation’ when faced with less affluent, lower wage and lower skill economies in a free trade environment (*ibid*: 92; 93; 95). At the same time, Western economies are viewed as needing the ‘backing’ of modern welfare arrangements, in particular those which intend to preserve or improve human capital (see Crouch 2019a). Other scholars, however, expound that capitalism provokes the ‘self-destructive destruction of its social containment’ (Streeck 2012: 26) as it tends to undermine the above arrangements in times of crisis. This obviously poses a challenge, as discussed earlier in this book section, to any emancipatory arrangement guiding modern life.

Overall, functional explanations of the welfare state have long been very influential in the social sciences, not only in its Marxist camps. Basically, they imply that industrial society requires state intervention for mere technical reasons, to organise the division of labour between reproductive and productive sectors (see e.g., Wilensky 1975 or Mishra 1977: 43ff, for early version of this argument). Van Kersbergen and Vis (2014: 11) posit that ‘capitalism’s competition-induced structural dynamics’ provoke a permanent need to invent and amend

welfare arrangements to make society ‘work’. Following this line of reasoning, functional requirements automatically fuel activities of organised welfare provision outside the capitalistic economy. It is noteworthy, however, that this mechanism – even if it were the only game in town – is unlikely to fully govern the social and cognitive processes related to welfare state policies. More generally, functional explanations gloss over the fact that welfare arrangements can, and do, develop independently of economic circumstances. Such arrangements may happen under the influence of normative ideas such as those contained in Enlightenment thinking or within the vision of social modernity as sketched above. Indeed, this observation has spawned alternative theories for understanding the foundations of modern welfare states as well, in part because functionalist theories ‘can hardly explain variations in policy outcomes from one country to another’ (Béland 2010: 82).

Engaging with this puzzle, a further body of literature posits that welfare arrangements take shape and develop with acts of purposeful *collective sense-making*, associated with distinctive cognitive scripts and normative commitments (on this debate, see Oorschot et al. 2008). Welfare states, so the argument runs, are encultured as is the political and economic system they inhabit. It is often argued in this context that once formal welfare arrangements – for instance social security schemes or a distinctive welfare programme for veterans – have become instigated in a given historical situation, they predetermine new developments in succeeding programmes and in their ‘technical’ environment. In portraying the career of modern welfare states, ‘historical institutionalism’ suggests that the design and routine work of an entrenched (e.g., bureaucratic) organisation (might) have stronger implications for the development of welfare programmes than anything else (see e.g., Skocpol 1992). In the context of parliamentary democracy, so the argument runs, such programmes generate a ‘self-reinforcing’ effect (Busemeyer et al. 2021) as voters deem institutionalised welfare arrangements as taken-for-granted. Couched in different terms, established institutions are viewed to impact their own future and entail what is referred to as path dependency. Deviation from accustomed institutions may occur when the entrenched path has led to a dead-end (McChashin 2016), yet programmes established for larger sections of a given population are assumed to elicit powerful policy feedbacks and remain in force over longer periods (Busemeyer et al. 2021: 157–9).

In a similar vein, part of the welfare state literature connects welfare (state) arrangements with normative orientations which social movements, interest groups or charismatic leaders bring to the fore. In Western history, some of these orientations – for instance those stressing individual merit or social justice – have been found to accrue public legitimacy, instilling a value-based rationale into institutions such as social security funds or social care schemes. As these institutions navigate various streams of material resources, they are often considered to carry the imprint of ‘moral economies’ as defined above. The latter are seen to markedly shape the mindset of the wider citizenry, right up to the present day (see Taylor-Gooby et al. 2019a). Following this line of thinking, collective sense-making appears critical to the building of welfare arrangements, regardless of the social forces that dominate the process of public opinion building and the institutional dynamics underlying a given welfare state trajectory. Proponents of this reading draw on historical examples such as the spread of the idea of democratic citizenship, the increasingly protective regulation of labour markets, or the extension of provisions fostering human autonomy during the life course (Kessler-Harris and Vaudagna 2018). Whatever the spirit behind established welfare arrangements, it is argued, regulatory frameworks created in this process can infiltrate the cultural repertoire of a given collectivity

and shape beliefs about what human beings need or desire. Related experience made in the past is exploitable at any moment in history. Importantly, a culturalist perspective on evolving welfare arrangements may help explain stability amidst turbulent change. Thus, scholarly contributions discussing the development of welfare state institutions over time suggest that these institutions have inherent staying power. Considering Western Europe, it has been found that, despite strong challenges, the institutions' recent history is 'set against retrenchment' (Taylor-Gooby 2016: 716), putting aside gradual change in terms of scope or generosity (Blank 2020, for the case of Germany). The academic claim for 'relativising retrenchment' (Hay and Wincott 2012: 105ff) comes with the contention that organised welfare provision has remained a taken-for-granted pillar of the European social model, despite the many economic, political and functional pressures it has been exposed to during the past decades (see below).

However, it is also observed that cultural dynamics can run counter to institutional stability within contemporary welfare states. A case in point is the growing popular interest in the latter's service-providing pillars, for instance early education or old age provision (van Kersbergen and Hemerijck 2012). Obviously, the overall solid support for policies boosting these pillars in Europe (see Garritzmann et al. 2018; Bremer and Bürgisser 2023) is associated with the interest of the economic elites in human capital building and using the labour force of parents (Ferragina 2020). At the same time, however, it co-evolves with the sense-making of better-educated, middle-class stakeholders concerning the respective welfare arrangements (Abou-Chadi and Hix 2021). Apparently, the aforementioned new arrangements are rooted in an evolving gender model and novel ambitions of self-actualisation among relevant groups of welfare state stakeholders. According to McAdam (2015), these stakeholders even form a 'new social class' defending these arrangements because it benefits them in two ways: first, related programmes provide interesting job opportunities within the human service sector and, second, offer some relief from private care work.

Regarding the scope and character of all these dynamics, the scholarship studying dynamics of change in European welfare states conveys a complex picture, including when it comes to characterising 'reform pathways' at the national level (for an overview, see Kuhlmann and Blum 2020). One strand of this scholarship suggests a global transformation of welfare states over the last decades (since the 1980s) and places an emphasis on the evolving political economy of organised welfare provision. It is observed that capitalism has become more radical in a number of respects, with welfare arrangements developing in unequal and volatile ways. Those sitting in the driving seat of big corporations, and their allies in politics, are viewed as being more powerful than in earlier periods of democratic capitalism, given an 'increased visibility of cosmopolitan super-rich elites' who take a 'significant influence over policy' (Morgan 2016: 206; 207; see also Garsten and Sörbom 2017 or Neckel 2020). The result is what Schäfer (2013: 173ff) refers to as regulatory and distributive liberalisation, as various Western countries have 'privatized state-owned enterprises, introduced competition where in the past state monopolies provided services of general interest ... and reduced employment protection, especially for non-standard employment'. Major expressions of this trend, it is argued, are lower wage replacement rates and a higher conditionality of welfare benefits. Concerning the driving forces behind this movement, part of the scholarship points to the changing architecture of capitalist economies, arguing that shareholder-value orientations have challenged the long-term investment culture of industrial capitalism (Morgan 2016). In this context, strategies of internal marketisation abound. Among other things, they materialise

in accounting schemes that impose competitive pressures directly on the labour process and the involved workforce (Dörre et al. 2018). This trend is also seen to put strain on industrial relations whereby part of their protective function, for instance in terms of occupational welfare, is lost.

More generally, it is stated that ‘capitalism continually tends to transfer its economic logic to other sectors of society’ (van Kersbergen and Vis 2014: 11–12), thereby expanding its zone of influence. A case in point is the growing role of private insurance and banking in people’s life course. This is viewed to reflect a ‘financialization of everyday life’ (Morgan 2016: 213) along with the dilution of publicly organised welfare arrangements in various areas. A further example is the adoption of private business models within welfare organisations and public administration (Maier et al. 2016; Bezes 2018). These models, assumed to instil capitalist spirit into non-economic sectors, often entail the quantification of organisational processes and work patterns which were long considered to be incommensurable (Bode 2019a; Diaz-Bone 2016). Related instruments – which are often conceived of expressions of managerialist thinking – include monitoring by benchmarks, internal contracting, performance-related pay and the introduction of ‘contractualism’ either in the encounter between public commissioners and non-state service providers, or for the interface between the latter and welfare service users (Brennan et al. 2012; Considine and O’Sullivan 2015).

The agenda of ‘marketising social protection’ (Frericks 2011) also takes shape with the admission of commercial firms to distinctive fields of organised welfare provision (Pieper 2018) and related forms of governance. Thus, an aggressive financial sector is found to step in by offering saving plans and actuarial insurance schemes. New forms of regulation materialise in prudential rules for asset-based retirement plans or in direct payments for users to purchase human services on competitive markets (Bode 2008a; Gingrich 2011; Ledoux et al. 2021). In a similar vein, twenty-first century social policies are found to place a strong(er) emphasis on ‘market compliance’ by welfare state stakeholders which are exposed to new types of behavioural regulation (Deeming 2016), for instance through provisions pressuring people to accept low quality jobs or poor working conditions. Some authors have seen herein a withering of social citizenship (Bothfeld and Betzelt 2011; Patrick 2017; Eleveld et al. 2020), arguing that the level of individual autonomy left to citizens has decreased with such provisions, including those policies baptised ‘active inclusion policies’ or ‘welfare-to-work’ schemes (see Chapter 8).

All these developments are associated with distinctive ideological orientations that have become hegemonic in twenty-first century Western societies – which points to cultural dynamics shaping welfare state change. These dynamics are often seen as being influenced by powerful interest groups. As Streeck (2012: 14) observed some while ago, Western welfare states have seen huge ‘efforts by governments, the media and standard economic theory’ to propagate ideas according to which markets will ensure the ‘highest form of social justice’. This cognitive script is assumed to serve as a crucial weapon in what Palley (2020) refers to as ‘neoliberalism’s war’ against the welfare state from the 1990s onwards. The related sense-making is seen to have shown strong resilience after the financial market crisis of the late 2000s, despite the turbulences produced by the latter (Schmidt and Thatcher 2013; Slobodian and Plehwe 2020). The above ideas have also infiltrated seemingly progressive social policy concepts. A prime example is the popularity of ‘social investment’ concepts as an instrument for ‘modernising the European social paradigm’ (Jenson 2017; see also Hemerijck

2013: 373ff; Smyth and Deeming 2016). Programmes under this label concentrate on fostering early childhood services, the expansion of opportunities to enter systems of (continuing) education and measures to enhance the employability of citizens with limited human capital. Recognising ‘social policy as an investment factor’ (Mayes and Michalski 2013: 1), this agenda concentrates on ‘productive’ effects achieved by educational activities or job placements while, as a logical consequence, putting less effort into services and income provision for (seemingly) ‘unproductive’ people (Laruffa 2018). In the same vein, the international revival of the discourse about the ‘undeserving poor’ (Romano 2017) is seen to come with a strengthening of both meritocratic norms and traditional beliefs about the nature of poverty and social deviance, which feeds the popularity of beliefs in individual causes lying behind disadvantage. This goes hand in hand with the rise of welfare chauvinism and xenophobic tendencies as discussed above, feeding into anti-welfare sentiments concerning programmes for social minorities (Jensen and Tyler 2015).

In some of the literature, cultural change in the welfare state is viewed to be coming more ‘from below’, pushing governments to respond to new popular demands. In the evolving social fabric, so the argument goes, the wider citizenry considers policy approaches of the past as widely outmoded. Thus, Mau (2015) contends that contemporary middle-class citizens – which he considers as forming a ‘majority class’ – appreciate market-based approaches to welfare provision, for instance, in the arena of long-term saving. Van Kersbergen and Vis (2014: 32ff; 112, 123ff) concur in stating that this social stratum pushes politicians to recalibrate the entrenched set of welfare state institutions. Among other things, growing sections of the population are observed to be interested in public efforts to boost human service markets. As noted earlier, a major driving force associated with this development is an altered gender model. A growing number of women have voiced their objection against traditional life course models, which pose barriers to their full labour market participation and imply less generous welfare benefits, especially after disruptive life course events (such as becoming divorced or a lone mother). From this reading, then, ‘ill-adaptation and new social risks to which the postwar welfare state does not cater ask for permanent reform’ (van Kersbergen and Vis 2014: 159). A similar perspective is adopted by scholars arguing that the marketisation of social protection responds to widespread demands to make welfare states more efficient. This line of thinking implies that market-driven forms of service provision are attractive because they improve welfare outcomes for all (Le Grand 2007) and also because, eventually, most welfare arrangements remain under public control (Williams 2004).

At the same time, it is put forward that twenty-first century citizens in Western Europe are overall less committed to classical institutions of the modern welfare state (for instance, collective income replacement schemes). Thus, the increasing complexity of welfare state governance is assumed to curb people’s enthusiasm for such institutions (Verschraegen 2015: 68). A similar effect is identified in situations in which long-established institutions are challenged by novel expectations but react to them by inertia (Conran and Thelen 2016). A case in point may be a healthcare system based on paternalistic models of decision-making, which clashes with claims for greater transparency in processes as articulated by both patient groups and public authorities. More generally, Béland (2010: 94) contends that ‘cultural re-configurations’ have entailed a gradual decline of the post-war logic of welfare provision, with institutional arrangements coming ‘under attack by people who experienced them as constraining their liberties and capacities for self-realization’. Such perceptions have frequently

been viewed as a stumbling block in attempts to find collective solutions to pressing social problems. A long time ago, British sociologist John Baldock commented that ‘in the context of “post-industrial” break-up of the large constituencies based on occupation’, large-scale projects of welfare reform appear likely to fail, given the many ‘particularistic, contradictory, shifting, sometimes bigotic, often exclusive value positions’ pervading the public universe (Baldock 2000: 134). Stråth and Wagner (2017: 174) echo this observation when arguing that ‘decollectivising tendencies’ during the last decades of the twentieth century elicited a permanent destabilisation of what they refer to as organised modernity. In this context, they contend, welfare state arrangements invented in the past century contained the ‘seeds of their own demise’, because with growing ‘normative institutional incoherencies’, these arrangements were unable to avert the creeping ‘disembedding of capitalist markets from society’ (Stråth and Wagner 2017: 169).

In the light of this discussion, the above statement concerning the double-edged character of modernity also seems relevant to the debate on welfare state change and the potential for policy-driven human progress. However, concerning the nature of such change, there are many open issues in this debate. We are still far from ‘studying social welfare *after* modernity’, as Carter (1998) was trumpeting many years ago. That said, the state of the art in welfare state theory suggests that current systems of organised welfare provision remain assemblages that exhibit considerable ambiguity and inconsistent dynamics. Apparently, ‘not all forces and pressures move in the same directions’, even as ‘conflicts and contradictions ... produce indeterminate spaces of agency’ (Clarke and Newman 2012: 103; see also Jensen et al. 2019). On the one hand, both economic and cultural forces appear to unsettle the architecture(s) of organised welfare provision in twenty-first century Europe as various welfare schemes have seen cutbacks or a decline in benefit generosity (Buendía et al. 2020; Dukelow 2021; Ferragina et al. 2022). On the other hand, it seems that movements of welfare retrenchment have often been confined to some programmes and countries, with welfare state spending remaining stable in total (Kerstenetzky and Pereira Guedes 2021), at least when considering developments in the new millennium and leaving aside some exceptions in the south of Europe. In basic areas, many Western welfare states have remained on track concerning their fit with normative claims engrained in modern thinking. Manifestations of this include the reinforcement of individual rights against personal discrimination, the ongoing extension of post-secondary education and the rise of new models for citizen participation. Here and there, moreover, twenty-first century welfare states have bolstered the above-described values of social modernity and related concepts, with this being exemplified, for instance, by programmes addressing disabled citizens. It seems as if, in the post-industrial era, ‘the progressive imaginary’ associated with modern thinking and related claims for ‘individual liberty, collective self-direction, social justice’ and human dignity continues to be addressed ‘in some way or other’ (Stråth and Wagner 2017: 172). Despite considerable strain put on twenty-first century welfare state institutions in various places, the institutions’ emancipatory missions have often remained on the public agenda (Williams 2016). Overall, then, there is no simple answer to the question about how organised welfare provision is evolving in complex politico-economic and cultural contexts.

## 2.3 PRINCIPLES OF SOCIAL MODERNITY – AN ANALYTICAL GRID TO CHARACTERISE ORGANISED WELFARE PROVISION

The preceding discussion leaves a big puzzle concerning both the dynamics underway in twenty-first welfare states and the influence of emancipatory orientations including those contained in the vision of social modernity. However, the wider literature helps us to devise an analytical grid which can be used for ‘reading’ the character of welfare arrangements concerning the latter’s (non-) conformity to ideas inherent within that vision. Such a grid should reflect the value-base of extant welfare state institutions in the light of historical experience, given that ‘society is not reducible to the concepts in play in a given period or conjuncture’ (Sum and Jessop 2013: 110). The grid can be composed by demarcating landmarks that are normative in kind and have distinctive moral underpinnings. Each of these landmarks contains an emancipatory rationale, which is rooted in Enlightenment thinking but, nevertheless, goes beyond achievements made in the twentieth and early twenty-first century. Related moral underpinnings are sometimes directly addressed by the philosophical or social policy scholarship, with prominent keywords being ‘freedom and equality’, ‘justice and equality of opportunity’, ‘rights and empowerment’ and ‘diversity and citizenship’ (Shionoya 2005; Drake 2011).

Importantly, all these notions have a sociological thrust as they can be used to decipher agreements societies make, or have found, when dealing with multiple values and interests. They hint at real phenomena insofar as they are – more or less – engrained in the social fabric of contemporary Western societies and materialise in institutions or organisations outside of the realm of mere economic (capitalist) rationality. At the same time, some orientations guiding these institutions and organisations carry the seeds of a vision for a ‘better world’ whose contours are imaginable but warrant further development. In this twofold line of reasoning, we can conceive of these orientations as principles of social modernity which influence the architecture of Western European welfare states and figure as important cultural references within contemporary democratic capitalism. To be sure, the underlying orientations do not rule out the strong role of self-interest in the (re-)building of public institutions. However, in modern societies, personal preferences are often interpreted in the light of what is deemed legitimate within a given collectivity. Moreover, many of these institutions are judged and promoted by citizens who have not a direct stake in them. In other words, they often ‘embody moral conceptions’ (Mau 2004: 68).

To grasp the inner logic of these conceptions, an important aspect to keep in mind is the pre-modern foundations of Western modernity. As noted earlier, ‘the respect for the sacred’ (Streeck 2012: 8) has remained instilled in the moral fibre of Western societies and reminds us of the fact that the philosophy of the Enlightenment partially draws on a traditional understanding in the representation of human existence. In Marshall’s understanding of welfare state development (Subchapter 1.1), this representation undergirds the idea that (national) collectivities cater for their members independently from the ‘economic value of the individual claimant’ (Marshall 1950: 43). This is backed up by the widely shared insight that human hardship may affect citizens randomly or by unpredictable and largely unmanageable forces, including biological threats. Shionoya (2005: 73) describes the thread of this rationale as follows: ‘People face a variety of risks and uncertainties such as disease, handicap, poverty, unemployment, homelessness, old age, and long-term care’; however, fairness norms require collective action

to compensate for these risks ‘when these phenomena are caused by social and natural arbitrariness that is beyond individual control’. This is obviously a moral (philosophical) claim – but at the same time, it largely resonates with mainstream reasoning in present-day Western societies. In general terms, this reasoning makes a case for providing unconditional collective support to damaged, structurally disadvantaged citizens including young people, irrespective of whether such citizens can, or will, reciprocate in contributions to the wider community in material terms. Typical expressions of this rationale in extant welfare state frameworks include educational services, minimum income entitlements, free healthcare and disability rights’ acts. The widespread establishment of such frameworks in twentieth century Europe signals the high legitimacy of the above reasoning, which politicians cannot ignore. This is regardless of implementation issues concerning, for instance, the choice between public insurance schemes or social assistance programmes. The thrust of the related agenda is encapsulated in the value of human dignity – which has an emancipatory character insofar as it may sustain institutionalised entitlements to organised welfare provision. Across Western Europe, this value is a reference point for various public policies that apply to all citizens including those unable to contribute to the common good – whether at present, in the past or in the future. Regardless of the variegated character of these policies, the latter reflect a first basic principle underlying the vision of social modernity.

Furthermore, in a footnote to one of his articles, Streeck (2012: 266) observes that, beyond the risks and uncertainties mentioned above, some welfare arrangements in Western societies are predicated on ‘attributions of social worth different from economic worth’ and embody ‘entitlements that cannot be expressed in terms of market prices’. In his eyes, such entitlements rest on the widespread conviction according to which ‘someone who puts in a “good day’s work” should not be poor’ and be able to ‘participate fully in the life of his community’ – which is expected to be an existence ‘outside of the dictatorship of ever fluctuating “market signals”’. This observation chimes well with Sennett’s statement that the respect of human work is inherent within modern thinking (Sennett 2003: 57ff, see above). In Streeck’s view, the underlying orientations prove to be a core element of what he refers to as the moral economy of advanced welfare states, referring to ‘non-market notions of social justice’ (Streeck 2013: 300). To be sure, the moral economy in these welfare states equally relies on meritocratic norms, which also translate into corresponding regulation, such as pay-as-you go insurance models or occupational pension plans. Nonetheless, numerous welfare state institutions embrace moral elements that go beyond market-based meritocracy. They inspire, for instance, minimum wages or welfare programmes such as indexed pensions or income replacement in the absence of sufficient payroll contributions. At least implicitly, such provisions acknowledge the fact that, in modern societies, supra-individual factors impact considerably on how their members fare in terms of individual well-being. A case in point is gratifications for human service work. As efforts in this occupational area are hard to measure in terms of labour market performance, the collective evaluation of the latter has often been fraught with traditional worldviews assigning low-status work roles to women. Internationally, there have been attempts to upgrade this status by political means more recently. Either way, the economic (market) value related to a given type of human effort has been constituted in a social process, given that representations prevailing at the macro level of a given society undergird agreements for rewarding human activities, including when outputs are unclear or efforts do not pay out as expected. Having ‘resisted all efforts at economic rationalization’ (Streeck 2013: 300), underlying notions of



social justice remain an important emancipatory orientation in European societies and stand for a second principle of social modernity, namely the idea to honour human effort regardless of (current) market values.

A further idea rooted in Enlightenment thought is that society should provide citizens with autonomy in shaping their personal lives with the best possible latitude. However, to exhibit an emancipatory character, this right to personal self-direction must align with the concerns of fellow citizens. Thus, as Bothfeld and Betzelt (2011: 26) note with respect to living conditions in modern welfare states, the ‘protection of individual autonomy requires respect for diversity and the support of mutual ... tolerance’ on the basis of shared values. In this line of thinking, such protection is justified as long as it takes into account, and respects, the autonomy of others. Phrased differently, the use of individual freedoms must be empathetic and considerate. This chimes with prominent concepts in political philosophy. Thus, American philosopher John Rawls (1971) – in dealing with problems of endowing human beings with autonomy rights within complex societies – points out that self-direction can be organised in equitable ways by awarding the greatest amount of freedom possible to any citizen unless his or her liberties infringe upon those of others. Building on this idea but going beyond Rawls, Indian philosopher Amartya Sen stresses that people’s reflective valuations should be a key reference point in this context and pave the way for designing or evaluating public interventions (Sen 1999). In his eyes, such interventions can enable a ‘freedom to achieve’ according to individual situations (capabilities) and a given set of preferences (situated choices). At least implicitly, this line of reasoning is fundamental to Enlightenment thinking – although Sen argues that many strands in the modern philosophy of justice gloss over people’s subjectivities. Programmes driven by this reasoning can be viewed to echo a third principle of social modernity, namely, a collective commitment to promoting self-direction along with the engendering and fostering of human capabilities needed to achieve this – including the ability to make autonomous decisions in a considerate way. To some extent, this rationale is inherent in extant welfare state institutions that shelter people from humiliation, non-respect and social exclusion (Bothfeld and Betzelt 2011: 22). A case in point is institutional support to disabled people in contemporary Western societies. More generally, the emancipatory thrust behind the above rationale consists of ambitions to empower vulnerable or disadvantaged citizens proactively and in systematic ways, by ensuring them equity of access to services in education, healthcare or social work, and making these services effective. This orientation is particularly prominent in some Nordic welfare states which invented the notion of welfare universalism and are committed to guarantee a wide range of public services to their citizens, taking into consideration perceived personal needs and structural impediments (Anttonen et al. 2012: 8).

All these principles can translate into prescriptions that apply to concrete stages and situations in a human being’s life course. To be sure, they may – and often do – overlap, collide with other social norms, or influence institution-building or collective action only partially. That said, in twenty-first century Western Europe, commitments to human dignity, social justice and (considerate) individual autonomy are important reference points throughout the larger population. While being elusive, they do sustain widely accepted operational agendas. To wit, Western European societies oblige themselves to provide young people with opportunities to grow up ‘correctly’ – including public education and shelter from ‘unacceptable’ harm. One can refer to this as a commitment to ensure an empowering childhood (see Chapter 7). Moreover, various prescriptions arise from the belief that, once people are at working

age, occupational activities should be free from deleterious stress. In European societies, the view that employable people should engage with gainful work twins with – more or less wide-reaching – expectations according to which working conditions should be subject to some sort of public regulation. On these grounds, certain forms of waged labour have become inadmissible (e.g., work without breaks or subject to despotic rule) while others remain under public debate (e.g., zero-hour contracts). Further prescriptions of this kind include health and safety measures, job dismissal rules, the right to the free choice of occupations or opportunities for workplace co-determination. The related imaginary is epitomised by the concept of decent work and corresponds to a broad array of regulatory provisions (see the discussion in Chapter 8). A further set of normative expectations in contemporary European welfare states addresses social security and welfare support during old age (see Chapter 9). Here as well, collective expectations feed into claims for public regulation, most prominently when it comes to retirement provision. Some jurisdictions in Europe have instituted a moral ban on (extreme) old-age poverty whereas in others, age-related material hardship is a permanent bone of contention. Western societies have also seen a creeping acknowledgement of elderly people's need for extra-familial care, including non-medical and non-bodily support. All this corresponds to the imaginary of a safe later life, which can be considered as a further concretisation of those principles that advanced societies (are set to) honour in twenty-first century Europe.

To reiterate, welfare arrangements under democratic capitalism serve various ends, and in many instances, extant social policy programmes sit uneasily with the previously mentioned values. Moreover, while the three principles portrayed above play out during all of the above life-course stages, it is obvious that they do not apply to all circumstances in the same way. For instance, children and frail old people are not expected to engage with gainful work. Nonetheless, by taking these principles as yardsticks, we can develop a more fine-grained understanding of the evolving nature of organised welfare provision within Western Europe and, by extension, grasp the fate of social modernity as a vision that inspires, or may inspire, relevant devices and makers in this universe.

## 3. What is shaping (social) modernity – and how can we study it?

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### 3.1 THE TANDEM OF INSTITUTIONS AND ORGANISATIONS

The vast body of theory reviewed thus far suggests that developments in the social fabric of modern societies emanate from a complex interplay of economic and cultural factors. Related intricacies involve the wider scholarship in endless and controversial debate about the mechanisms that influence social development more largely. When the focus is placed on organised welfare provision, the dynamics under consideration in this study can be broken down into concrete manifestations of this social fabric. Key to this universe is the tandem of institutions and organisations, as argued earlier in this book. Their respective nature warrants some reflections when it comes to studying welfare arrangements and their dynamics. At the same time, it should be kept in mind that there exists a world ‘outside’ of institutions and organisations that impacts upon these arrangements and dynamics. In what follows, this assemblage is considered in greater depth.

#### **The Critical but Ambiguous Role of Institutions**

Importantly, there is a general agreement among social scientists that institutions are critical to building and developing a given social order (see e.g., Abrutyn 2013 or Krücken et al. 2017). Institutions are considered as key instruments for shaping those agreements by which modern societies handle diverging interests and worldviews. Granted, extant institutions pursue various – and sometimes antagonistic – aims, such as preserving property rights, ensuring the provision of bureaucratic rule, or enacting processes of social control. In twentieth century Europe, however, they have arguably contributed to the building of arrangements that comply with some of the promises contained in emancipatory Enlightenment thinking. A classical definition of institutions conceives of them as ‘purposive, regulatory and consequently primary cultural configurations, formed unconsciously and/or deliberately, to satisfy individual wants and social needs’ (Hertzler 1946:4). At the same time, institutions are often understood as a regulator of social relations, located at the intersection of ‘macro-structural forces ... , emphasized by a range of more “structural/functionalist” theories’, and social outcomes, for instance ‘class-based political mobilization, welfare state programmes, trade and market liberalization’ (Conran and Thelen 2016: 52). Moreover, institutions are widely viewed to have a certain self-preservation capacity, as it takes time to both create and overcome socially binding conventions.

To be sure, academic disciplines differ in the way they conceptualise the roles and intricacies of institutions, including those of modern welfare states. Accounts anchored in economics

place an emphasis on how institutions frame rent-seeking behaviour, for instance by enacting transaction costs, preforming the calculation of utility and providing actors with protected assets in market interactions (for many, see Kasper et al. 2012). Political theory, in turn, posits that institutions established with a remit to govern a given collectivity work by creating power positions and establishing veto points, sheltering vested interests and building frames for the mediation of competing claims (Rothstein and Steinmo 2002). From this reading, the interplay of political actors and their way to govern the citizenry is shaped by binding arrangements to organise law and order. Sociological approaches to institutions go beyond this understanding and emphasise their ‘cultural loading’. Hertzler (1946) refers to strands in classical sociology according to which institutions are carriers of a society’s culture and, as a result, subject to ‘cultural struggle’. In Weberian and Durkheimian thinking, they are imbued with morality as they embody a given set of meanings and assumptions about what is ‘normal’, ‘good’ or ‘bad’. Related orientations are seen to turn into norms shared by larger communities, rather than being fully arbitrary. Moreover, through a sociological lens, institutions ‘come with a (meaningful) sense “from the past”’ and include ‘collective cognitive scripts’ that underlie social action ‘beyond conscious strategy’ (Conran and Thelen 2016: 53; 54). At the same time, modern institutions appear as carriers of rationalism through which certain norms prevail over others in a given social order (Lepsius 2017). As discussed earlier, this may have contradictory implications.

In line with this reasoning, a good deal of the scholarship engaged with welfare state analysis assumes that institutions reflect regulatory ideas that hold sway at a given moment in history and then live a life of their own (Béland 2016). At the same time, institutions are often understood to reflect an entrenched compromise nested within an ongoing social struggle. Sum and Jessop (2013: 34), exploring the interplay of economic and cultural dynamics in modern (capitalist) societies, refer to institutions as ‘complexes of social practices’ that intersect with distinctive patterns of social relations and are ‘associated with particular forms of discourse, symbolic media or modes of communication’, all subject to purposeful human agency. In their eyes, the ‘incomplete specification of institutions makes their reproduction dependent on skilled, reflexive and adaptable actors’ (Sum and Jessop 2013: 62; Screpanti 2001: 112ff, for a similar argument). Likewise, Conran and Thelen (2016: 57) stress that major strands of social theory underline the dynamic side of institutions, arguing, for instance, that ‘institutional designers or rule-makers never fully foresee or control the uses to which their creations are put’. From this perspective, institutions are susceptible to change in various directions.

True, institutional frameworks often build on generic organising principles – for instance, ideas of the modern family or the concept of the bureaucratic state – which can be conceived of as entrenched ‘institutional logics’ (Thornton et al. 2012). These logics may also comprise those normative orientations that this book considers as promoting the vision of social modernity (human dignity, social justice and considerate individual autonomy). However, the underlying cognitive scripts can be intermingled with all kinds of institutionalised expectations and a priori be driven by highly diverse concerns (e.g., religious, political, juridical and so on). Moreover, classical sociological thinking suggests that, in modern society, institutional logics are operating in parallel, with one and the same actor, group or organisation being influenced by several logics at the same time. This experience challenges dichotomic understandings of the societal order of democratic capitalism, for instance those based on a categorical distinction between economic goals and non-economic (sets of) logics, nested in a ‘society of organ-

isations' (Perrow 1991) featuring a clear division of work between the two realms. At least reasoning in terms of institutional logics pays credit to the fact that this dichotomy is neither hermetic nor equilibrated (in the sense that organisations on the two sides have equal power). Rather, this line of thinking allows for retracing the re-mix of institutional references within a given regulatory framework or organisational setting, up the point that one particular logic comes to dominate other logics in a given context. Concerning organised welfare provision, such a shift in institutional logics has recently been witnessed in 'marketised' human service sectors catering for elderly people and children (Aulenbacher et al. 2019).

More generally, the discussion about the ideational foundations of modern welfare states summarised earlier in this book section suggests that, in the long process of modernisation, institutional arrangements in Western societies have frequently turned against these foundations. Regulatory frameworks built on such foundations are often blamed for structural inertia in a context of economic or social change, ill-adaption to newly arising human needs and offering little flexibility in ever more volatile times. Furthermore, public institutions have been viewed as endorsing rent-seeking by those in control of them (e.g., bureaucrats) or creating incentives to maintain extant rules for the benefit of a powerful minority even though they have become useless. All these observations explain the widespread disenchantment concerning modern institutions and their social impact. Though being aimed at implementing widely shared values, their character is often seen as producing adverse effects (Mitchell and Simmons 1994). This pattern is encapsulated in the Weberian image of the 'iron cage', that is, the observation that organisational arrangements favouring red tape and stagnation hamper the respect of such values (e.g., individual rights to self-direction), rather than endorsing them. Given the ambiguity inherent in processes of institutionalisation, the evolving role of institutional frameworks and logics should be given ample attention when studying the condition and development of organised welfare provision in twenty-first century Western Europe.

### **Organisations as Potential – and Uncertain – Makers of Difference**

In the modern world, institutional norms need to be enacted by human actors who can corroborate, refract or deflect them. Organisations spell out related formal prescriptions in more systematic ways. As a ubiquitous and typical phenomenon of modern society, they have become a key operator of the economy and public administration since the industrial revolution (Scott 2014; Furusten 2023). Concomitantly, distinctive forms of collective action have emerged in the realm of civil society, emanating from a bundle of organised activities or 'intersecting projects' (Klein and Lee 2019: 71) with mutually agreed objectives. In the classical scholarship, organisations are mostly conceptualised as social entities driven by a fixed purpose, with an internal order based on property rights, based on hierarchical and fixed membership roles and with a boundary function to manage inflows and outputs (Abrahamson (1993 [1986]); Thompson 2017 [1967]; Scott and David 2007). While some scholars consider these entities as 'instruments of domination' (Morgan 2006: 259), modern organisations are often viewed as cultivating multiple missions contained in the social order they inhabit (Powell and DiMaggio 1991).

Approaches drawing on Weber's legacy (as summarised above) understand organisations as transmission belts of modern rationalism that are seen to progressively pervade all social spheres through their very agency (Meyer and Bromley 2013). This tenet is also found in

accounts with a post-Marxist imprint (such as Althusser's approach), which conceive of organisations as carriers of an ideology that make individuals 'submit to the rules of established society' (Elliot 2014: 122). Regarding modern history, these observations seem compelling. However, within Western societies, organisations have also come to harbour alternative forms of sense-making, most notably in the realm of civil society (see Mair and Seelos 2021 or Brighenti 2019), but also within modern bureaucracies (Yang 2022) and social enterprises (Laville et al. 2015). Regarding welfare issues, organisations have often been found to trigger 'social innovation' – which, as one should keep in mind, is a term that evokes various connotations (Lunde Husebø et al. 2021) and has frequently been used to advocate for more deregulated forms of organised welfare provision (Martinelli 2012; Fougère and Meriläinen 2022).

It has often been argued that, when it comes to 'goal setting and goal attainment' (Dill 1958: 410), organisations take shape – and develop – in line with their concrete 'task environment'. As organisations are inextricably intertwined with their periphery, they must comply with externally set requirements. This contention is a major cornerstone of approaches subsumed under the label of 'organisational institutionalism' (Greenwood et al. 2017), which argue that organisations generally conform with institutionalised expectations (or logics) existing in their ecosystem. At the same time, organisational theory is replete with approaches that emphasise the critical role of 'sense-making' operations among organisational agents. In the light of this, contemporary organisations appear as places for creative action, collective strategy building and emerging practice (Smets et al. 2015; Seidel and Greve 2017; Introna 2019) – and generally provide members with leeway in meeting incumbent tasks. Notably, the wider scholarship engaged with the study of contemporary organisations suggests that the latter's agents may become absorbed in proceedings that deviate from 'official' goals. This understanding is also intrinsic to the Foucauldian understanding of organisations as self-perpetuating social entities whose members never cease to govern themselves and others. This deviation or 'decoupling' is often seen as a source of idiosyncrasy, making members evade or twist extant goals within certain limits. Among other things, this may arise from the pursuit of personal interests, which is the core theme of the so-called principal-agent theory (Jensen and Meckling 1976; Lane 2005) as well as rational choice models conceptualising organisations as 'corporate actors' (co-)shaping the world they inhabit (Coleman 1974). In a similar vein, institutionalist theories argue that an organisation's actual routine is often disguised by formal structures and ceremonial practices (Meyer and Rowan 1977). Some institutionalist accounts claim that their agents, despite being exposed to prescriptions from 'out there', can and do find opportunities to go their own way and resort to 'institutional work' (Lawrence and Suddaby 2006; Martin et al 2017: 122ff; Andersson and Gadolin 2020). Under certain circumstances, so the argument runs, organisations may deflect potentially intrusive logics and protect themselves from a full alignment with external expectations. Organisational agents may leave external prescriptions unmediated in order to maintain internal processes which otherwise would be jeopardised. Organisations may equally refract logics and refocus their accustomed activities over the course of time. Goal drift within organisations may also emanate from a biased flow of information or the temporal and random coincidence of external and internal impulses (Cohen et al. 1972). Under these conditions, processes turn out to be self-referential in the first instance, although this may be masked by organisational discourse (Brunsson 1989).

That said, organisational agents can use 'opportunities for autonomy' (see Martin et al. 2017: 122, dealing with healthcare agencies) for various purposes. Social constructivism

and (pragmatist) process theory (see Lorino 2018) are suitable theoretical lenses to grasp the related dynamics. Basically, they imply that any attempt to ‘organise’ social life may produce outcomes that differ from both previous (collective) habits and concurrent operations undertaken by other social entities. From this vantage point, the practice of organising is inherently teleological, rather than a self-contained (autopoietic) process. When organisational agents perform, so the argument runs, their representations may serve as a resource for situated actions, with cognition and intuition being entangled in many instances. In this context, goals have a heuristic role whereas a given organisational mission is pursued by adapting practices to encountered circumstances. Organising then implies a ‘ceaseless learning experience’ (Lorino 2018: 255, with reference to Weick), with entrenched operations being subject to permanent inquiry through which they may be ‘transformed, adapted, abandoned, or reinvented’ (ibid: 32). Under these circumstances, ‘creativity is not an occasional quality of exceptional courses of action, but an existential requirement to pursue the course of experience always faced with unpredictable disruptions’ (ibid: 278).

In light of all this, modern organisations are places for making a difference. The process of coping with emergent situations often appears as a ‘window open to the vast world, a potential source of surprise and novelty’ (Lorino 2018: 105). Organisations in (late) modernity, constructivists posit, are repeatedly led to transform established routines and ideas by creative sense-making (Weick 1995; Maitlis and Christianson 2014; Czarniaswka 2014; Tuominen and 2018), with this having an impact on both members and environments. At least, in this understanding, neither institutional frameworks nor internal hierarchies will govern the entire range of activities contemporary organisations are involved in, that is: monitoring their inner life and environments, interpreting observations, making sense of action undertaken, memorising past action, and finding solutions to complex and previously unknown problems. Hence the organisational settlement of modern societies comprises zones for emergent collective agency with a potential to develop extant structural conditions further – or, alternatively, to deviate from them in systematic ways. A constructivist understanding of such agency foregrounds both constraints and choices when organisations and their members craft (new) arrangements (Schwinn 2007), are immersed in ‘enactivism’ (Stapleton and Froese 2015: 129), and become involved in temporally bound dynamics of ‘doing things together’, based on interpretations of past or present contexts and projective capacities (Emirbayer and Mische 1998). Agents do not necessarily end up in ‘iron cages’ but are capable of shaping the social world as ‘*makers*’ who process or mitigate change at both organisational and societal level – sometimes even as ‘institutional entrepreneurs’ (Garud et al. 2007) who alter the rules of the game inside and outside organisations.

That said, given the discussion thus far, there are good reasons to conceive of modern organisations as *uncertain* ‘makers of difference’. This especially holds for those bodies and agencies that inhabit non-economic societal sectors. Thus, classical public administration theory departs from the assumption that, regarding government agencies and state departments, political authorities set the tune, with ‘loyal’ agents in bureaucratic settings doing their jobs in line with what ruling forces demand. If the latter want to change established practices, these settings are expected to conform with related prescriptions. This understanding, which also informs accounts dealing with neo-bureaucratic forms of public sector governance (Farrell and Moris 2003; see below), implies that the above sectors simply translate external prescriptions into adequate action. At the same time, members of modern organisations, including public

bureaucracies, are influenced by multiple social environments (Yang 2022). In this context, they may be led to (ab)use their power to pursue personal interests (Mitchell and Simmons 1994; Koven 2019). Some scholars, while casting doubt on this form of idiosyncrasy being the dominant pattern, concur that members resort to discretionary capabilities which are needed to bring a public mission to fruition and develop their mission (Du Gay 2000; Du Gay and Zinck Pedersen 2020). Moreover, organisational settings in this universe contain space for collegiality, with agents combining bureaucratic routine and self-governance by seeking agreements which ensure ‘coordination and cooperation in complex and uncertain decision making’ (Lazega 2020: 14). This also pertains to relationships with external stakeholders in the wider welfare state infrastructure who want these settings to be flexible in complying with a given remit (Sirris 2020). Using their expertise playing out a given professional ethos, agents may also be led to ‘prosocial rule breaking’ as a process by which they ‘work around, disregard, or stretch the spirit of written rules’. This may occur because they seek to preserve this ethos (Fleming 2020: 1192; 1194). In many instances, agents within the above infrastructure simply must perform their job by using ‘street level’ discretion, as they implement regulatory frameworks which leave open what must be done in an individual case and in volatile situations (Lipsky 2010; Hupe 2019; Brodtkin 2020). This very performance might be critical to their organisations ‘conserving’ social life generally speaking.

To be sure, much depends on the precise character of the institutional environment in which organisations are operating. Thus, in a context of ‘New Public Management’ (NPM) in which service units become accustomed to work like private businesses (Diefenbach 2009; Bezes 2018; Reed 2019), street level discretion may adopt specific traits. Defined roughly, proponents of NPM want(ed) to divide organisational departments into self-responsible units or profit-centres; to make them operate with devolved budgets and pre-fixed general targets; establish competition with co-actors concerning goal attainment (using benchmarks and rewards or sanctions); or outsource services to external providers, after tendering and evaluating concurring bids. This mantra is often seen to have transformed the character of collective agency in relevant settings. At times these processes are understood as a variety of neo-bureaucratic rule, instilling ‘governmentality’ into both their staff and management (Haikkola 2019), even as public administration has become exposed to more fine-grained accountability rules (Lægreid 2014). Recent scholarly work suggests that agents exposed to this trend nonetheless maintain a leeway in their compliance with managerial prescriptions, for instance by ‘negotiating tools’ invented by higher-ranked authorities (Mik-Meyer 2018), using space in the rules (Baker Collins 2016) or playing with the promise of better performance by an increased latitude of self-directed action (Karlsson 2019). This also pertains to pressures to collaborate with other units or non-state parties and to embark on network projects as propagated by a discourse of ‘new public governance’, which is often seen as an alternative to the NPM orthodoxy (Osborne 2006; Kekez et al. 2019; Poole et al. 2021).

In various areas of organised welfare provision, the salience of emergent or self-perpetuating collective agency is also attributed to the fact that relevant settings are impregnated by the logic of professionalism (Freidson 2001; Ackroyd 2016; Burns 2019). Sociologists conceive of professions as occupations enjoying a special social status – notwithstanding that the debate about their origins and reasons is controversial. Typical explanations of this status include the critical role of knowledge-based expertise and related personal authority, achieved prerogatives concerning the achievement of decisions on behalf of larger collectivities, commitments



to scientific rationalism and a public mission in the (alleged) interest of the wider citizenry. Furthermore, the professional mode of ‘organising’ is deemed to comprise value-based and cause-sensitive action which makes them (potential) carriers of transformative agency within, and across, organisational settings (Tuominen and Lehtonen 2018). At the same time, professionals have been found to focus on perfect compliance with extant task environments, according to templates set by top managers or political authorities. Such ‘organisational professionalism’ (Evetts 2011: 408), flourishing during the heydays of the NPM mantra, differs from the traditional idea of professions as being partially independent from ‘their’ organisation – which Evetts refers to as (the imagery of) occupational professionalism. The wider literature also hints at the emergence of ‘hybrid professionals’ who (must) manage tension-ridden configurations and incompatible institutional logics (Blomgren and Waks 2015). After all, professionalism comes with diverse patterns of collective agency, reflecting different modes of situational enactment.

The same applies to organisations rooted in civil society. Some of these are deeply involved in the power structure of contemporary Western societies, propagating upper class visions of community life and operating in line with elitist normative worldviews; others represent constituencies from lower status groups (Arato and Cohen 2017; Williams and Abott 2019). In the historical perspective, civil society organisations, broadly speaking, have frequently been at the forefront of developing solutions to social problems and creating innovative welfare arrangements (Evers 1993; Myers 2017; Westley 2017), which have been scaled up later on by public authorities and legal acts (Klein and Lee 2019: 70–72). That said, activities in these organisations are based on distinctive, membership-specific understandings of missions and methods, which often reflect a selective (particularistic) orientation towards social problems. At least in the Western world, the organisations’ formal structure generally corresponds to the model of associational democracy (Cohen and Rogers 1995; Lang 2013; Horch 2018). Voluntary members, not owners or bureaucrats, set the tune. Even more hierarchical non-profit organisations producing goods or services are still operating under the influence of volunteers in boards and among their workforce. While being subject to considerable public interference (Salamon 1987; Rees and Mullins 2015; Bode 2015; Aiken and Taylor 2019), they are widely expected to serve their non-governmental stakeholders, which is often viewed to lay the ground for a special mode of ‘non-profit governance’ (Cornforth and Brown 2013). Membership organisations that concentrate on voicing shared concerns within the wider society are equally shaped by the dynamics of voluntary action. Such interest groups, which Sträth and Wagner (2017: 153) consider as ‘one of the key ingredients of organised modernity’, include trade unions and social movements involved in industrial conflicts (Dahms 2000; Streeck 2013), as well as civic associations that influence the market behaviour of private corporations (Frynas and Yamahaki 2016). After all, the impact of civil society organisations upon social development in the Western world seems real but inconsistent.

Importantly, the boundaries between public sector and civil society organisations can be blurred. Thus, historically, state agencies operating at municipal level (see Steinmetz 1993, chapter 3; Hanssen et al. 2001) have often played an incubator role similar to that of civil society organisations – which implies that this role does not necessarily hinge on non-profit governance models. At the same time, non-state organisations entrusted with running public benefit schemes and ‘people changing’ (Hasenfeld 2010) by social intervention must follow comprehensive sets of bureaucratic prescriptions. This also holds for commercial firms con-

tracted by public authorities. Within what this book refers to as ‘welfare sectors’, collective agency frequently becomes involved in balancing different institutional logics in situated and individual ways (see Hustinx et al. 2014; Fossetøl et al. 2015; Clouet et al. 2022; Orupabo 2022; Murphy 2023) when implementing institutional frameworks in a context of partial autonomy.

Whatever their internal constitution, these welfare organisations assume multiple roles: they translate rules into practice, thus putting flesh to the bones of legal frameworks; they can be places for advocacy or innovative activities; and they may also be a source of policy feedbacks or conceptual inputs into politics, influencing the very process of rule-making – and thereby triggering institutional change. From this angle, we can conceive of these organisations and their agents as multi-coloured ‘makers’ of welfare. While they often cultivate normative expectations ingrained in the social order of (Western) modernity, they can turn into active players within this very order – simply because organisations, though being dependent on their environment(s) to an extent, always live a life of their own. At times, welfare organisations operate as (vigorous) instruments of rule or mere transmission belts of public authorities by executing institutional prescriptions without further ado; in this function, they appear as little more than a particular variety of those ‘devices’ that have been depicted in the preceding section of this book. Even then, however, they may perform acts of organised welfare provision by adapting entrenched norms to a single ‘case’ or local conditions and consequently play a ‘conservative’ role by contributing to stability within a given social fabric and making welfare states ‘work’ in pragmatic ways (see e.g., Trappenburg et al. 2022). Alternatively, such organisations may renege on their promises when implementing prescriptions from inside and outside. In a context of bounded rationality, time limits and accountability pressures, they may be fraught with anarchical forms of decision-making and random patterns of internal coordination (see e.g., Lomi and Harrison 2012) – which makes them appear uncommitted. Such idiosyncrasy may also emanate from competing organisational goals, for instance the coincidence of benevolent mission statements and rent-seeking (with the latter being a key concern of many commercial providers, see Pieper 2018). Concomitantly, organisations committed to emancipatory values may use their expertise and public standing to transform institutional frameworks and organisational fields more broadly (Westley 2017; Mair and Seelos 2021). Given the complexity of collective agency in this universe, however, only an analysis employing thorough empirical scrutiny can reveal how welfare organisations in Western Europe impact upon these frameworks and fields – including with respect to the principles of social modernity.

### **‘Interfering’ Social Factors Residing in the Environment of Institutions and Organisations**

If institutions and organisations can be conceived to shape (social) modernity, what is the role and place of social factors which many sociologists would locate as outside of their respective realms? These factors, often assigned to the micro-level of social life, cannot be ignored in a reflection about how Western European societies are evolving. They obviously impact upon institutions and organisations, yet may have no direct link to them. Indeed, contemporary individuals (and the groups they belong to) seem to enjoy at least some independence from institutional and organisational prescriptions. In this sense, orientations and actions of modern

subjects constitute environments for contemporary institutions and organisations. True, a prominent reading in the social sciences has been that, especially during the heydays of industrial modernity, institutions and organisations have had a strong imprint on individual subjectivities. Critical theory in particular was inspired by the ‘iron cage’ idea portrayed above, assuming that, under the increasing influence of juridified institutions and rationalised organisations, space for creative social action and deliberative agreements would inevitably dwindle (Delanty and Harris 2022). However, major strands of contemporary sociological reasoning imply that, during the twentieth century, institutions and organisations came to leave more and more space to individual discretion, for instance by citizenship entitlements in a context of what was often referred to as the social-democratic consensus (Whitehead and Crawshaw 2014).

The clearest expression of this lies in the individuals’ private ‘life-world’ as a space in which the modern subject makes important decisions on personal relations and projects (Habermas 1984 [1981]). Scholars dealing with processes of reflexive modernisation suggest that Western citizens have become more independent in this sphere, given an expanding ‘autonomy of individual lifestyles’ (Berzano 2019). While this may particularly apply to the better-educated middle classes and the elites more generally, the ‘sacred character of the individual’ – to use a formulation of Goffman many decades earlier (Goffman 1967: 47; 95) – seems to have developed into a new wave of ‘expressive individualism’ as discussed earlier. At the same time, social actors were always able to (re-)fashion institutions and organisations. This pertains, for instance, to individuals with a personal interest in power. Indeed, both large-scale economic transactions under the control of capital owners and the strategic behaviour of political elites have largely shaped the social world(s) modern people inhabit. In current times, capitalist entrepreneurship – most prominently within big corporations (Styhre 2022) – continues to be a strong ‘interfering’ factor in processes of social development. In other areas, charismatic leaders in religious or political movements prove to be influential actors (Zúquete 2020). Some operate as moral entrepreneurs reforming institutions and organisations with reference to their own values (Becker 1995; Waeger and Mena 2019). In all these dimensions, individual agency matters greatly to modern societies.

Furthermore, modern citizens may act together in order to reshape a given institutional or organisational settlement. Many constitute loose networks and gather informally, including with the intention – or at least the effect – of moulding regulatory frameworks and organisational settings. Social movements are a case in point. Non-economic entrepreneurs and social activists (can) meet in spheres within which institutions and organisations have no direct bearing. They form groups capable of breeding ideas that deviate from pre-extant routine and extant institutional frameworks. True, social movements have often made use of organisations as a ‘cultural resource’ (Buechler 2000: 207) and generally engage with extant institutions. Furthermore, their activities are not always future-oriented, as evidenced by recent activities on the far right of the political spectrum (Castelli Gattinara and Pirro 2019). Others, while being progressive in some sense, tend to be infused with values held by a minority of citizens (e.g., green activists or avant-garde thinkers). Nevertheless, the non-organised and non-institutional (inter)action of creative human beings has frequently been a catalyst of change in the modern social order (Bosi et al. 2016). Moreover, many movements taking shape in the Western universe did, and do, espouse the agenda of progressive modernisation in one way or another. Therefore, when engaging with the fate of social modernity, it is imperative to

look at dynamics in this particular realm, for instance by capturing structural developments in civil society and the latter's constituencies.

All this implies that decoding both the 'DNA' of codified institutions and the chemistry of formal organisations may not suffice alone to understand the dynamics of modern societies and to speculate on their prospects. Given the potential for creative and discrete action among human beings, processes detached from institutional rule and organisational hierarchy are supposed to impact upon these dynamics and prospects. Modern individuals can find ways to boycott the dominant logic of a given organisation even when they are a member of that entity, for instance when embarking on industrial action. Others struggle or play with symbols entrenched in extant institutional frameworks, for example, when sidestepping official prescriptions or compiling alternative concepts for collective action. As a result, welfare arrangements in modern society evolve with overarching trends of social change which are only partially channelled by established institutional frameworks and organisational scripts. Regarding the ambit of institutions and organisations that form current welfare states, the factors mentioned above often interfere from outside and rely on non-formalised practices at the micro-level of society. While, within the confines of this book, it is obviously impossible to retrace all relevant processes playing out at that level, Chapters 4, 5 and 6 will briefly review the 'state of the art' studies on social change for the case of Western Europe, in order to map 'interfering' factors with a relevant impact upon organised welfare provision, now and in the future.

### 3.2 EXPLORING ENCULTURED INSTITUTIONS AND ORGANISATIONS FOR HUMAN WELFARE INTERNATIONALLY

As is well-known, the architecture of Western welfare states is nationally coloured and reflects considerable variety even within Europe. Scholarship engaging with comparative social policy suggests that such a discrepancy cannot be reduced to gaps in economic prosperity. Rather, these gaps often connect with distinctive sets of values impinging on those arrangements by which national communities design 'their' system of organised welfare provision. Even with similar economic conditions, it is maintained, this system carries specific traits. Indeed, the prevalence and composition of these sets of values vary considerably between countries, for instance, when it comes to the appraisal of individual merit and the pledge for inalienable citizenship rights. In the scholarly debate, extant differences are widely understood to translate into 'welfare regimes' or types of welfare capitalism (Esping-Andersen 1990; 1996; Deeming 2017; Schröder 2013; Iversen and Soskice 2019). Scholars studying varieties of welfare capitalism often adopt a broader focus in placing the emphasis on institutions that 'organise' the economy and its infrastructure, such as those shaping the field of industrial relations, educational systems or corporate governance. Patterns of organised welfare provision properly speaking are more or less included in such accounts. An important distinction in this literature is the one between liberal and corporatist models. Nordic countries are seen to share commonalities with the latter, though exhibiting distinctive characteristics, such as a strong (welfare-providing) public sector and extraordinary investment in education. Liberal models, while often embracing a universal core (most notably, a public healthcare system), are viewed to be reluctant with regard to state 'interventionism'. They also tend to feature poorly

institutionalised labour relations at industry level, modest inter-firm coordination and less systematic vocational training. The corporatist world scores higher on all these items (but is less collectivistic than the Nordic regimes).

More recent versions of this typology suggest that some of these differences have partially survived the transition to what is often referred to ‘knowledge economies’, in particular with regard to educational institutions (Iversen and Soskice 2019). As for welfare arrangements, narrowly speaking, the widely known classification of Esping-Andersen, which distinguishes three families of welfare states (Nordic, conservative, liberal), remains compelling in many respects. Among other things, this classification focuses on the degree of ‘decommodification’ that welfare state institutions entail with regard to the division of labour between the market, the state and families. It also highlights differences in the organisational approach to social protection, impacting upon ‘who gets what’ and in which life circumstances. Some scholars have argued that, as far as Europe is concerned, a fourth type should be added, given that Mediterranean countries do not seem to fit this three-regime typology in a couple of respects. While the respective debate about a ‘Southern-European welfare regime’ has remained controversial (Therborn 2013), these countries exhibit distinctive traits when it comes to welfare provision. This particularly holds for the strong role of the family in social care provision and the importance of informal employment, each remaining influential patterns in recent years. Moreover, Eastern Europe displays its own particularities concerning regime design and development, although institutional traditions of (various) Western countries have spilled over to many post-communist countries (which are not considered further in this book). Bearing all this in mind, one must conclude that organised welfare provision is encultured at national level.

Nevertheless, the analysis carried out in this monograph starts from the assumption that a growing number of otherwise diverse nation-states have come to share more and more common attributes concerning the institutional and organisational foundations of organised welfare provision. In the context of expanding economic trade and supra-national institution building, the European Union has seen remarkable movements of convergence regarding these foundations. This assessment is reasonable once democratic capitalism is understood as an overarching social order featuring a free-market economy accompanied by arrangements that ensure a certain level of welfare provision independently of the individual rewards offered by that market economy. The emphasis on common characteristics is corroborated by the literature dealing with the role of social citizenship in Western welfare regimes. True, this concept seems most consonant with regimes inspired by the heritage of English reformer William Beveridge in which welfare arrangements concentrated on a couple of universal entitlements awarded to a nation’s inborn citizens without further conditions (see e.g., Dwyer 2010, chapter 4; Hort and Therborn 2016; Rogan and Alfers 2019). However, other welfare regimes have organised similar (quasi-)universalistic entitlements under a different architecture, with social security institutions *de facto* covering the bulk of the waged population and further welfare state stakeholders, for instance, in the event of medical need or long-term care dependency (see Bode 2008a; Blank 2020: 519). Conversely, seemingly universalistic entitlements can prove rudimentary as they target the poor or may provoke ‘non-take-up’ behaviour among parts of the entitled population (van Mechelen and Janssens 2017).

Thus, conceptual differences are often less striking than they seem. At least in some respects, the recent decades have seen movements of convergence and similar patterns of

institutional change in the social policy field (Schmitt and Starke 2011; Wright et al. 2020). Major policy agendas are cross-national, for instance those related to labour market or pension reforms (Marchal and van Mechelen 2017; Orenstein 2013). What is more, it seems that cultural differences between welfare states have been thinned out with constant movements of globalisation, as suggested in the introduction to this book. More generally, it has been argued that national traditions are becoming less influential regarding the architecture of major institutions and organisations worldwide (Meyer et al. 2010). At least the highly developed European societies now live in a common economic world featuring strong individual property rights, concentrated capital ownership and unleashed markets (see Radice 2014), all coexisting with political systems of representative democracy based on secular values and the rule of civil law. Increasing convergence is also indicated by the recent transformation of political systems across Western Europe, as suggested by work dealing with the rise of right-wing populism and the shrinking role of more classical left-leaning political parties (Guth and Nelsen 2021; Manwaring and Kennedy 2017).

Therefore, contemporary Europe is faced by both persistent institutional variety and partial convergence. Against this backdrop, this book makes a compromise when portraying contemporary ‘worlds’ of organised welfare provision and change therein from an international perspective. It concentrates on commonalities beyond discrepancies while offering a more fine-grained picture of developments at the national level when probing into selected subfields. For the analysis of overarching regulatory frameworks – which perfectly lend themselves to compare dynamics of institutional change – Part III of this book examines cross-national developments throughout the three areas mentioned earlier (devices related to child empowerment, decent work and safe old age) without making systematic distinctions between national jurisdictions. Concerning the selected subfields (child protection, active inclusion schemes, and personal care for elderly people), extant and evolving institutional conditions will be inspected separately in sections portraying the developments of these conditions at the national level. The countries under study include England, Germany, Norway and Italy. The second step, in Part IV, explores the role of collective agency by – and within – welfare organisations, with the focus set again on cross-national commonalities. This is undertaken with the assumption that insights into this role can be gained without making systematic distinctions between national jurisdictions. At this point, the analysis delves into an in-depth inspection of case study evidence from different European countries.

Overall, then, the rationale adopted for the international approach adopted by this book is analysing commonalities in context. Evolving institutions and organisations in various welfare sectors are scrutinised across regime types with a particular eye on what has happened to all varieties of democratic capitalism (in Western Europe). The analysis will pay attention to (gradual) international differences at some point, yet the key focus is upon on cross-national dynamics of change including the blurring of boundaries. The overarching aim consists of elucidating the transnational role of those ideas, which have been found to be inherent within Enlightenment thinking and which inspired the vision of social modernity in the recent past. Being confined to Western Europe, the investigation sidesteps developments in other parts of the Western world, for instance Northern America, and specifically the United States and Canada (usually considered as representing the liberal type of welfare regime). However, trends in this part of the world are implicitly taken into account, because, over the last decades, developments in the United States have triggered movements of change spilling over into the

entire Western universe (Clarke and Newman 2012). Furthermore – and despite the above retraced argument about the ‘many modernities’ around the globe – many observations made in this study may ring a bell in newly advanced ‘tiger states’ as these have come to adopt European concepts to organised welfare provision on various occasions and appear inclined to do so in the future as well (see Lee 2016; Cammett and Sasmaz 2016; Rogan and Alfes 2019).

### 3.3 CRITICAL REALISM AND AN IDEOGRAPHIC PERSPECTIVE ON ORGANISED WELFARE PROVISION

In methodological terms, this book is inspired by a holistic research ‘philosophy’, exploring the contours of a complex assemblage from a bird’s eye perspective while also probing deeper into specific institutional or organisational phenomena. This ideographic orientation is aimed at ‘getting inside’ the institutions and organisations which modern societies purposively use to influence the welfare of their citizens, in order to explore the ways in which related welfare arrangements conform to principles ingrained in (the vision of) social modernity – and how (far) the affinity to these principles has changed more recently. As mentioned in the Introduction to this monograph, the latter’s approach is based on distinctive epistemological considerations which translate into a specific research design. This final part of this subchapter elaborates on these considerations, as well as the contours of the research design, in general terms, leaving the provision of more detailed information to Parts III and IV of this book.

The roads that social scientists use to explore human agency and development are paved with epistemological positions – that is, assumptions about how the social sciences can gain knowledge about reality. As noted earlier, this book is inspired by the paradigm of critical realism as a distinctive approach to understanding social phenomena (see Bhaskar 1978; Danermark et al. 2002; Archer 2014; Porpora 2016; Elder-Vass 2022). This approach implies that a holistic understanding of the emergence and development of human-made reality is both required and feasible. Scientific enquiry is concerned with identifying the nature and interplay of mechanisms that produce this reality. Such mechanisms include both structural forces – which observers may not be immediately aware of – and (a multitude of) purposive human reactions on these forces (Gross 2009). By identifying such mechanisms and their interplay, sociologists can unravel the chemistry of a given societal order, including its cultural underpinnings epitomised by values and normativities. Importantly, from the perspective of critical realism, all social facts, rather than being epiphenomena of reality in the mindset of individual observers, do exist objectively. These facts are susceptible to empirical analysis – even though scientists may fail to grasp the full picture. As Sum and Jessop (2013: 9) put it, social inquiry is faced with ‘real but often latent causal mechanisms that may be contingently actualized in specific conjunctures’. Hence it may be tricky to provide ‘proofs’ for how these mechanisms act in the domain of the real and cause events. Nonetheless, scientific inquiry can get close(r) to ontological objectivity in finding a truth that exists outside of the representation of human beings and is not just a subjective social construction. Accordingly, scientific observation is able ‘to adjudicate between rival reality constructions’ and different ‘accounts of the world’ (Porpora 2016: 73; 76).

A central hallmark of research inspired by critical realism is a sceptical attitude towards both empiricist positivism and radical social constructivism, including their preferred methodologies. While empirical assessments are a ‘must’, they eventually can only be based on

idiographic explanation, rather than on mere numeric associations. In this line of thinking, social phenomena cannot be reduced to foundational economic or social ‘laws’, because their fabrication develops with varied and intermingled acts of human sense-making and under the influence of local contexts. The real world is never closed and contains an unlimited number of ever-changing causal processes that ‘operate simultaneously, interfering with each other in irregular ways’ (Porpora 2016: 43). Statistics can illuminate these complex movements, but only if they are embedded in a ‘narrative’ which follows a historical thread. This narrative is the canonical form of inquiry into how social phenomena and outcomes take shape. Sociologists capture ‘objective reality’ by understanding how things interrelate. Focusing on driving forces behind social processes, they build theories which help them approach the composition of reality (Danermark 2002: 10). An example given by Porpora is power positions in a given society, which critical realists would consider as having ‘causal properties’ that ‘exist even if they go unexercised’ (Porpora 2016: 34) and become activated by mechanisms such as class relations in labour markets or property rights. Importantly, subjectivity is crucial in this process. According to critical realism, social dynamics take shape through agential responses to structural conditions. As ‘actors twist and turn and otherwise act within the structures that bind them’, these responses ‘will always exhibit degrees of creativity’ (Porpora 2016: 104; 117). Thus, power positions can change. This proposition, resonating to an extent with Giddens’ perspective on the interplay of structure and agency, makes collective sense-making an important momentum in social development. Such sense-making is fundamental to what Porpora (*ibid.*: 132–5) describes as a ‘projective element (a future orientation) in human agency’ which opens avenues for consciously attentive, goal-directed behaviour.

In light of this, reality must be traced back to different layers of human practice. Social action by creative actors, though being embedded in structural fixes, is an important mechanism in the shaping of the human world. Furthermore, modern organisations, relying on a ‘historical conditioning’ and being in this sense highly structured, constitute ‘pathways of agential interaction’ and can mobilise ‘reflexive capacities’ of organisational actors who enact entrenched frameworks in distinctive and innovative ways (Delbridge and Edwards 2013: 935; 941). Hence, organisations are places for collective agency in the sense elaborated above. In addition, institutions, while shaping the social order of modern societies, are equally exposed to ‘inventive’ human agency. They are ‘only “relatively enduring”’ and open to structural transformation – notwithstanding the ‘durability of past practices, beliefs, and interests’ that may remain ‘attractive to marshal enough support to protect and to prolong them’ (Archer 2014: 3; 7). In a nutshell, the message of critical realism is that whatever the structures people are, or become embedded in, the social world is evolving through embedded creative agency.

How do these insights translate into the central argument of this book? First of all, the evolving social phenomena under investigation are patterns of organised welfare provision, that is, institutions and organisations in which extant and evolving welfare arrangements crystallise. Institutions are viewed to have structural implications on welfare sectors while organisations are understood as both instruments of these institutions and versatile, ambivalent and creative ‘makers’ of welfare, that is, an agential response to structural conditions. This response, as well as the incremental change of institutional fixes, is subject to influences from outside of the realm of organised welfare provision. Hence the analysis of the phenomena under study must account for movements of social change more broadly, as well as for developments in other institutional and organisational fields. Secondly, the meta-theoretical assumption of the study



is that cultural forces – though being interwoven and co-evolving with social structures, and most prominently, the political economy of democratic capitalism – are causal mechanisms in the making of welfare arrangements and the wider welfare state architecture in Western Europe. Rooted in processes of collective sense-making, these forces are sedimented in institutions, but are also subject to creative agency in distinctive organisational settings. Hence, as explained earlier, both institutions and organisations are understood as encultured social phenomena, which implies that their evolving ideational foundations must receive particular attention in social inquiry. Ideational factors produce contingency in social life as they actualise a multitude of ideas about humanity, social behaviour and values that are worthwhile to pursue. As the ingredients of modern thought have never been monolithic, a study exploring the ‘fate of social modernity’ needs to take the related complexity and pluralism into account. Thirdly, the diagnostic endeavour in this book focuses on providing a ‘narrative’ on the evolving role of the principles of social modernity in extant institutional and organisational arrangements for welfare provision, with an additional effort being made to pinpoint some of the mechanisms in the social fabric of twenty-first century societies which impact on this role. The theoretical thread emanating from the overall analysis – put roughly at this stage – is that, internationally, the universe of organised welfare provision undergoes a contradictory movement of change which provides specific cues for speculating on what might be feasible in future times concerning the influence of the above principles on this very universe.

In accordance with this epistemology, the research concept chosen for this book consists of inspecting institutions and organisations within selected welfare sectors by using a qualitative approach (Patton 2014). This implies an emphasis on (condensed) social meaning and (collective) sense-making, notwithstanding that statistical data is taken into account when this enables us to capture relative dimensions and varieties. This approach follows the conviction that only thick description (Geertz 1973) reveals the ‘encultured’ and complex character of both institutions and organisations in the area(s) under study. To be sure, the analysis in this monograph is not based on ethnographic work properly speaking – although some of the reviewed case studies (did) follow an ethnographic research strategy. However, the investigation engages with the ‘inner logic’ of institutions and the ‘inner life’ of organisations in ways able to capture the texture of related phenomena rather than the relative magnitude of various isolated factors and calculated correlations. Compared with large-scale statistical analysis, this approach allows the opportunity to dig deeper when exploring the organising principles in twenty-first century welfare arrangements. While this comes at the price of limited accuracy in terms of scale and intensity, the idiographic explanation of institutional and organisational dynamics is amenable to a more encompassing ‘narrative’ about the chemistry of organised welfare provision in Europe and its future prospects. A qualitative lens is also chosen for the cross-national perspective adopted in this monograph as it helps set country-specific facts into a wider context – that is, national circumstances and international trends (Livne-Tarandach et al. 2015). The overarching intention here is to identify functional equivalents across (seemingly) different social entities.

As noted earlier, the devices related to organised welfare provision materialise in evolving regulatory frameworks, conceived of as institutional foundations of democratic capitalism. To capture their inner logic, these frameworks are subject to an interpretative inspection, which is operated by using sensitising concepts. Seeking to uncover the interlinkage of social values and institutional devices, the research ‘technology’ loosely draws on the epistemology of

grounded theory as a meta-approach to inductive social research (Bowen 2006), with a major concern being to ensure openness and contextualisation. Available policy and field studies shedding light on both the frameworks and their recent transformation can be used to probe into underlying logics, that is, the role of those principles which are contained in the analytical grid portrayed above. That said, dynamics in the institutional-set up of welfare arrangements must be discussed with a side glance at developments in the economic and cultural environment of this set-up. The investigation also pays attention to ‘hidden’ regulation – for instance dispersed rules in a national system of industrial relations or unwritten prescriptions in domains of human service professions. This is because legal texts do not reveal the entire picture when exploring the nature of institutional regulation; rather, the latter often embraces less formalised elements such as professional norms, characteristics of regulatory bodies or a conceptual rationale. Foreigners can gain access to the wider background of all these frameworks only by ‘going native’ with a given welfare state context. From the perspective of a scholar rooted in one particular national research community, possible ways to achieve this include academic stays abroad combined with efforts to discuss observations with national experts during international meetings or in cross-national research projects. All these paths were taken by the author in developing this book over several years.

In methodological terms, the investigation adopts the form of a category-led institutional analysis (re-)examining information contained in policy and field studies on child welfare endeavour, employment protection (broadly speaking) and provisions for income replacement and eldercare after retirement. In essence, this analysis is descriptive, yet it has a hermeneutic orientation in that findings on regulatory frameworks are embedded in knowledge about unwritten rules and the frameworks’ evolving context, even as related observations are read through the prism of abstract logics (the principles of social modernity). The same operation is undertaken when investigating selected subfields in greater depth. These include peripheral activities of organised welfare provision that have grown more important over the last decades, namely: child protection, work (re)integration including active inclusion programmes and personal care to elderly people. This part of the analysis digs deeper by collecting detailed information country by country (for those jurisdictions mentioned above). The final step then consists of comparing the evidence across different nation-states with an eye on cross-national developments. Concerning the technicalities of all these operations, more information is provided at the beginning of that book section.

The analysis addressing the ‘makers’ of welfare in Western Europe – that is, typical organisational landscapes and settings in the aforementioned areas – is based on a different strategy. As will be explained in greater detail at the beginning of Part IV, the focus should lie on the momentum of collective agency and related organisational dynamics in welfare sectors concerned with, broadly speaking, the administration of social benefits and human service provision. Again, thick description is helpful here, albeit at the meso-level of social action and with a specific approach to the secondary analysis of scientific evidence. Basically, the respective sections of the book combine a recapitulation of overviews concerning the evolving organisational landscapes with a more fine-grained re-examination of evidence on typical organisational settings as published in (multiple) case studies (Stake 2006) from the above sectors. This is organised in three condensed scoping reviews of the respective literature, which covers various European countries and includes studies (co-)conducted by the author of this book. These reviews, portraying evolving settings in three subfields (child protection,

work integration and personal elderly care), collate qualitative knowledge across organisations, sectors and welfare regimes, thereby conveying in-depth insights into the evolving organisational settlement of contemporary Western European welfare states.

As mentioned earlier, the environments of regulatory frameworks and organisational settings matter greatly in a study dealing with the realm of organised welfare provision and the fate of social modernity more broadly. In these environments, activities and orientations of people in their 'life-worlds' mirror what sociologists generally refer to as social change. While this change is not always directly interlocked with the frameworks and settings under study in this monograph, institutional and organisational processes are influenced by dynamics in their environment. Concerning developments in organised welfare provision, these dynamics come into play as an additional, external factor of social modernisation. In other words, they form the 'backstage' of these developments. Therefore, the (following) second part of this book, offers a synopsis of scholarly work describing the transition to a post-industrial configuration within Western European societies. The observations included in this synopsis refer to issues of social stratification, change in civil society and the evolving political economy of democratic capitalism. The respective analysis is based on overview work as offered by the wider sociological literature (major sources are cited in Part II). Inevitably, this quick foray into the debate on 'social change in 21st century Europe' (Crouch 2016) cannot be but highly selective. It is predicated on the author's own reading of societal trends as discussed in the wider literature. In terms of methods, this literature draws on various sorts of condensed statistical data that help infer rough conclusions concerning developments with a potential to affect organised welfare provision at least indirectly. The trends under review include the transformation of the capitalistic economy, rising individualism, as well as intensified ethnic pluralism and indicators of more disruptive forms of collective action in politics and civil society. Related observations illuminate the wider context of devices and makers in twenty-first century welfare states – and help gauge future prospects for them in the closing chapters of this book.

The final step of the analysis in this monograph consists of providing an overarching diagnostic assessment of where Western Europe stands in the twenty-first century concerning the vision of social modernity, which lays the ground for reflections about conceivable prospects and future options. The assessment is guided by a rationale that this study refers to as diagnostic realism. The messages contained in Parts III and IV are blended with insights inferred from the theoretical sections (Chapters 1–3), as well as with observations on the wider repercussions of social change as portrayed in the 'background section' (Part II) of this study. Regarding recent challenges to (the vision of) social modernity, the book's key findings are encapsulated in three concepts which help condense overarching trends, namely, dismantlement, disorganisation and dissociation. Concerning the debate about future developments, the methodology applied provides a discussion of (more or less) progressive concepts for welfare reform – for instance social investment, universal basic income and services or economic democracy. In technical terms, ten concepts more or less prominent in the international social policy debate are put to a 'test' against two dimensions: on the one hand, the fit between these concepts and the vision of social modernity, and on the other, the preconditions which (would) have to be met when it comes (or came) to shaping organised welfare provision according to that particular vision. Thereby, the final part of the monograph provides a down-to-earth outlook to the potential fate of social modernity in Western Europe.

## PART II

# Social change on the backstage: Western Europe in flux

### OVERVIEW

The second part of this monograph contains a set of ‘background chapters’ delineating the evolving societal context of organised welfare provision throughout Western Europe. This is accomplished by recapitulating basic messages from recent social-scientific scholarship dealing with the economic, cultural and political circumstances under which current societies forge welfare arrangements and might do so in the future. These messages matter because, to understand past change in the nature of these arrangements and to discuss their wider prospects, we need basic insights into the ‘backstage’ of those institutions and organisations through which Western European societies (seek to) directly influence the well-being of their citizens. Thus, the following summarises evidence on what is generally referred to as *social change*, that is, major transformations in the living conditions and collective mindsets of European citizens.

The focus lies on overarching cross-national trends, for instance, evolving socioeconomic cleavages, the rise of individualism or change in (political) interest intermediation. Related dynamics are conceptualised as residing in the environments of those regulatory frameworks and organisational settings which constitute the universe of organised welfare provision. The review is based on a synthesis of the wider literature, identifying overriding developments which assumedly impact upon the various welfare sectors considered throughout. The general message is that Europe is ‘in flux’ concerning its economic foundations, patterns of social (re-)stratification and the conditions for public policy-making – with recent transformations leading to a post-industrial configuration that exhibits both new complexities and tenacious patterns of social inequality.

## 4. Towards a post-industrial configuration of democratic capitalism

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Statements about how societies are evolving in economic, political and cultural dimensions have often been highly controversial in modern sociology, as scholars active in this arena are far from agreeing on common understandings. Within the confines of a ‘background’ analysis like this, it certainly is impossible to deal with the related intricacies and to picture past and ongoing dynamics in more comprehensive ways, and even more so with respect to the degree of international variety. Nonetheless, as far as the last decades are concerned, a study probing the fate of welfare programmes and organisations in Western Europe should be based on a rough understanding of what is widely referred to as *social change*. This notion has multiple connotations and may include activities through which people proactively alter a societal order – bearing in mind that history frequently proceeds without such activities (see Ballard and Barnett 2023). Be that as it may, condensed descriptions of how societies are evolving help understand the ‘backstage’ of dynamics in the realm under study in this monograph.

In technical terms, the following is based on assessments contained in overview studies which have been published in recent years for an international readership (Crouch 2016; Chase-Dunn 2016; Harper and Leicht 2018; Iversen and Soskice 2019; Nico and Pollock 2022, Siza 2022; Aruqaj 2023; Gherardini and Giuliani 2023). For space reasons, these sources are not referenced in systematic ways, yet a number of more detailed observations which seem particularly relevant to the theme of this book will be substantiated by citing single studies (especially concerning developments in politics and civil society). Key movements of social change will be portrayed by summarising data on facts concerning, among other things, the flow of income, educational achievements and the structure of occupations. Special attention will be paid to cultural dynamics, such as individualisation and growing ethnic plurality, as well as to developments signalling changes in political and civic behaviour.

Conceptually, this synthesis draws on a sweeping narrative in the social sciences, which postulates that, from the late twentieth century onwards, modern societies have seen a transition towards the age of post-industrialism. In some ways, this is a label by default as it is tricky to pinpoint how current traits of European societies actually differ from those established up to, say, the 1980s. Importantly, when using the above label, this book does not fully subscribe to the view of those scholars who once invented this notion, or to the accounts of those observers who currently cherish this concept. This particularly pertains to the scholarship inspired by American sociologist Daniel Bell (1973). When portraying the post-industrial settlement, part of this scholarship insinuates that divisions between social classes have eroded, that the vast majority of occupations allow for a stimulating work experience, and that values espoused by Western citizens are becoming post-materialist across all settings. This narrative hints at apparent movements of social change but nonetheless needs to be nuanced as it may be misleading in important respects (see the critical discussion below). More fundamentally, it

would be erroneous to understand the post-industrial configuration as one in which industrial logics no longer matter. In twenty-first century Europe, these logics persist regardless of the fact that economic activities based on assembly line production have decreased proportionally when compared with activities that have become more prevalent in the aftermath of modern industrialism. Many of the newly arising service sectors (e.g., call centres or logistics firms) are based on industrial principles, as are frameworks concerning the regulation of waged labour. What is more, the capitalistic mode of organising human life has anything but disappeared with the shrinking of classic industrial sectors. In light of all this, there is no point in proclaiming the end of all those institutional and organisational patterns that became dominant during the industrial age.

Nonetheless, and despite international differences, Western Europe has seen a transition to a new settlement which this book conceives of as the post-industrial configuration of democratic capitalism. This transition, first of all, is reflected by major changes in the economic system. In this respect, current European societies exhibit a paradoxical nature. On the one hand, they are faced with the decline of classic industrial sectors, whereby important areas of manufacturing have been transferred to less developed countries. Concomitantly, huge service sectors have newly emerged – be it in finance, product design, marketing or human service provision (González 2019). In these sectors in particular, novel types of employment and occupations, management models and public (de)regulation have flourished. Furthermore, major business sectors have seen the spread of what has become familiar to name ‘financialisation’, in relation to both the governance of firms and the coordination of economic transactions (Styhre 2015; Morgan 2016; Tridico 2017). Activities of the financial industry – driven by stockholders and investment banks with global ambitions – have altered the nature of the economic system in the Western world, accelerating and frequently disrupting the flow of monetary assets into the production or trade of goods and services. This is often observed to have occurred alongside an upsurge of shareholders as critical decision-makers within relevant business sectors and to affect people in their private lifeworld, particularly with respect to how citizens (can) protect themselves against social risks (Santos et al. 2017).

On the other hand, classical approaches to the industrial organisation of economic activities persist, including in some high-tech sectors, regardless of novel types of products, such as communication systems or digital devices. While entwined with new (internationalised) business models and organisational forms, the rise of large IT and media communication companies implies new forms of classical corporate power and quasi-industrial planning. Moreover, big firms in both traditional and innovative sectors operate as global players, with a strong influence on small-scale (sub-)suppliers. Hence, in contemporary capitalism, hierarchical power has not been replaced by mere network partnerships, as (once) insinuated by some economic sociologists (e.g., Castells 1996). Rather, current Western economies are still populated by corporate actors geared towards controlling markets and their workforce in strategic ways (Bryne 2019; Styhre 2022). ‘Big Business’, which was an invention of the industrial age, continues to form powerful alliances in both the economy and wider society (Murray and Jordan 2019). In a nutshell: while much has changed during the twentieth century, major characteristics of the industrial era have reappeared in a new guise – which is a movement overseen by many of those elaborating on the characteristics of the post-industrial economy (Vogt 2016).

Moreover, the current ‘service economy’ comprises very dissimilar sub-sectors, with ‘job polarisation’ being a matter of fact in most European countries (Peugny 2019; Gherardini and

Giuliani 2023: 338). One sub-sector is commonly defined as the realm of knowledge work. Notwithstanding international variety (Thelen 2019), this realm contains two novel segments – one salaried, the other one composed of freelancers. The respective workforce is (mostly) high-skilled and (rather) well-paid in this context. Creative endeavour, entrepreneurial orientation and dense human interaction are typical characteristics. Personal involvement, based on intrinsic motivation or commitments towards employers, is comparatively high while feelings of alienation are less widespread than in classic mass production industries (Gallie 2019). Work is more flexible in terms of hours and contracts. This can benefit employees – but may also advantage employers, depending on market dynamics and the availability of human capital. Where the latter abounds, the social position of waged workers is weak. Thus, post-industrial service sectors are not necessarily a realm of carefree and stimulating professional work, and this includes self-employment. To wit, current forms of freelance work often combine low social protection and volatile income streams to produce new forms of precarious labour. Importantly, what is contained within the term ‘the knowledge economy’ carries traits of a more classic industrial regime, materialising in standardised labour processes, benchmark-based performance control and deadlines employees must respect rigorously (O’Carroll 2015). What is more, the post-industrial service economy contains a rapidly growing sub-sector for unskilled work, featuring low pay, unstable employment and quick job turnover (e.g., in the catering or cleaning industry). Precarious work is particularly salient in this universe (Lambert and Herod 2016; Kalleberg 2018). Social insecurity – particularly when combined with low income and the incapacity to save – makes life planning (education, raising a family, preparing for retirement) a huge challenge under these conditions. The risk of social marginalisation is real here and affects various stages of life course, especially in the event of macro-economic turmoil or in the context of austerity politics.

Overall, business models and regulatory approaches gaining traction during the late twentieth century have clearly left traces in our contemporary social world. At the same time, the above developments have refashioned previously established institutional frameworks and organisational forms, with clear implications for the day-to-day life of twenty-first century citizens. This pertains to work settings, to arrangements of the life-world and to cultural representations of extant social bonds. Thus, the post-industrial configuration has altered the ways in which citizens feel interconnected and how they make sense of their role in the wider society, including the interface between civil society and the state, as well as related patterns of interest intermediation and policy-making (see below).

One of the most salient features of the post-industrial configuration is the growth of human service industries. This pertains to activities such as healthcare, education, childcare, support to the elderly, professional advice, organised companionship or guidance. Thus, over the last decades, the institutionalisation of activities in ‘social work settings’ has continued, entailing a marked expansion of the related occupational realm (Noble et al. 2014). It holds true that, in many European countries, the traditional attitude according to which ‘light’ forms of social care should remain incumbent on families has not died out. Concomitantly, voluntary action has remained relevant in this area of (informal) work, with related social expectations being endorsed by a powerful public and media discourse. This notwithstanding, formally organised welfare provision has been booming in the more advanced parts of Europe over the last decades. In many places, social (and healthcare) services have become a major backbone of the welfare state (Jensen 2011). These services have added to the universe of monetary bene-

fits, although the latter have remained primordial at least when regarding their relative weight in terms of gross national product (especially because of the growing magnitude of pension payments). Western Europe has also seen the proliferation of ‘post-industrial’ benefit schemes which combine payments with person-oriented intervention, for instance in welfare-to-work arrangements (see e.g., van Berkel and van der Aa 2012). Together with the expansion of early education and elderly care services, these schemes have contributed to the growth of the human service industry internationally (Bode 2017a).



## 5. Social stratification and the evolving status system in post-industrial times

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The modern world is largely shaped by how adult human beings are involved in gainful work. This fundamental sociological insight has inspired a good deal of research on social change, placing an emphasis on evolving labour markets, occupational regimes and shifts in the division of labour within the population of advanced welfare states. The underlying assumption is that the life chances of people strongly relate to where they are located in this particular universe. The realm of the life-world – that is, people’s private sphere, shaped by family relations, friendship and leisure activities – while being decoupled from the realm of gainful work in many respects, is often seen as being intermingled with this realm. This life-world not only embraces opportunities for personal self-direction but also various constraints associated with assumed social responsibilities, be it for partners, children or other family members. Moreover, the conditions of private life undergird, or at least influence, human activities in civil society and politics. In light of this, social change must be investigated by considering both the universe of gainful work and arrangements in the life-world. The relevance of the related interface is widely acknowledged, as indicated by the flourishing discourse on ‘work-life balance’ in the early twenty-first century (Guest 2002; Kelliher et al. 2019). Change in this balance can have important repercussions, way beyond the mere ‘upgrading’ of women in the stratification system of Western societies (as observed by Streeck 2009). Overall, one needs to account for complex transformations when depicting change in the evolving social fabric of twenty-first century European societies.

### 5.1 GREATER VOLATILITY AND LESS PERMEABILITY IN THE SOCIAL FABRIC

It is commonplace wisdom that the status system in twentieth-century Europe was largely based on a distinctive type of meritocracy and related hierarchical relationships, along with an overarching power structure based on entrenched role-sets entailing prerogatives for the economic elites and limited options for working-class citizens. The social status of individuals was widely contingent on educational achievements and on longer-term positions attained in the job market. Concerning the waged population, the respective interlinkage appeared particularly strong in continental Europe (Nachtwey 2018). Yet even elsewhere, blue- and white-collar workers, when employed by a well-established company, had a good chance to live in secure (even though often modest) material conditions over a long period of time, given various social rights linked to their employment contract (Castel 2003).

To be sure, throughout the last century, the majority of women became included in this model only slowly and often more indirectly. Frequently, their social status and, by extension, their access to social protection, was somehow inferred from the level achieved by

their husbands, for example, via co-enrolment in social insurance schemes. In the absence of sufficient personal income from paid work, the scope of self-direction in material terms was in a way 'borrowed' from partners and depended on the latter's good will. After a separation or a husband's death, females were entitled to (some) derived benefits (and alimony), yet the experience of social deprivation and low income was relatively widespread among women (and has remained prevalent since then in many places). Nonetheless, the mainstream conditions of salaried workers and their families during the heyday of the industrial era (after World War II) featured a solid social status which, due to old age security provision, persisted after retirement.

In many cases, this condition connected with opportunities of upward mobility during the life course, at least for a worker's offspring. These prospects were associated with the economic developments sketched above as well as related options for human capital building which enabled younger generations to outstrip the generation of their parents in terms of educational achievements and attained skills (see the discussion about major characteristics of social modernity in book section 1.1.2). As a tendency, people were enabled to choose where to work and live. Changes in employment status were often demand-driven, as expanding firms were interested in enduring work contracts. This opportunity structure was endorsed by longer-term orientations of employers and private companies, whereas 'shareholders' had a limited influence on the latter's policy. Across larger sections of the economy, the related employment regime exhibited gratification schemes based on job-tenure and options for climbing a given hierarchical job ladder (Morgan 2016: 204). While this development did not endanger the economic elites' dominance in firms and throughout the wider society (see below), important cohorts of the working population obtained access to material and cultural goods that had previously been reserved to higher status positions. The inherent civilisation of the economic system also improved life-course prospects for children from disadvantaged backgrounds. While the role of welfare state institutions differed markedly between national welfare regimes, it was palpable even where these institutions were confined to targeting poorer sections of the citizenry.

In the post-industrial age, the status system of Western European societies has become both less permeable and more volatile for important parts of the population (Streeck 2009; OECD 2018; Pohlig 2021). While meritocracy has remained a strong factor in this system, the stairways to upper levels have narrowed, with citizens from a lower-class background finding fewer opportunities for upward social mobility despite their individual effort. Intellectual skills have become ever more critical for people seeking to climb the career ladder or maintain the social status they once attained (Iversen and Soskice 2019). At the same time, post-industrial welfare state institutions offer less protection for past achievements even as there is an increasing likelihood of becoming trapped in lower-class positions. Concomitantly, a more market-driven evaluation of individual performance within private firms has increased status risks for better-educated citizens, with the recognition of merit oscillating in line with the degree to which more shareholder-driven markets reward a given economic activity (for an early description of this trend, see Sennett 2006). In this context, volatile market dynamics may influence individual advancement more strongly than educational skills, professional experience and hard work. This, in turn, may put an achieved social status at risk and comes with enhanced insecurity during a working life.

Undoubtedly, post-industrial societies still exhibit important features of the social fabric endemic to the industrial age – in particular a strongly entrenched bias in the distribution of income and social power. Most notably, regardless of redistributive social policies, which had become a typical feature of organised modernity and democratic capitalism during the twentieth century, the gulf between the large majority of waged workers and those sections of the citizenry that form the elites (or align with this latter group) has never disappeared. That said, when examining the dynamics of social change and their impact on the wider status system of Western European societies, one should go beyond stating gaps between ‘the many and the few’ (to adopt a slogan from British politics that flourished in the late 2010s). Rather, a more fine-grained perspective on the evolving social stratification of Western European societies is warranted. The notion of class is useful for this endeavour, even though the far-reaching economic and cultural transformation of Western societies since the heyday of (late) industrialism has led many scholars to abandon this concept altogether. However, while classes do matter, one should avoid the shortcomings of narratives that overstress the role of material factors when decoding the DNA of contemporary democratic capitalism (typical examples include Aronowitz and Roberts 2017; Dörre et al. 2018; Das 2023). To understand social divisions in contemporary Western Europe, a strong emphasis needs to be placed on the cultural dimensions of such divisions, including those tangential to the private life-world. Thus, in our times, collective orientations of social groups are anything but determined by levels of material wealth or given educational achievements (Bornschier et al. 2021). A promising way forward consists of enriching the concept of class by employing the use of ‘social milieu’. This term can be traced back to Durkheim (1964 [1895]) and his observations on spatial and communicative closure among major constituencies of modern society. In addition, the notion of ‘milieu’ chimes with ideas about a human being’s adhesion to special subcultures and reference groups. German sociologists studying social stratification (such as Reckwitz 2020) have built on this concept to devise lifestyle typologies. The latter resonate with Bourdieu’s (1984) work on social space and its structuration by cultural attitudes which are understood to feed into common human practices based on similar forms of capital.

When social divisions in contemporary Europe are portrayed along these lines, classifications drawing on work by British sociologist Jonathan Goldthorpe prove to be useful (see Goldthorpe and McKnight 2006). A quick foray into the evolving social stratification of Western European societies can only apply his approach in a simplified way and must gloss over apparent international differences (see Gherardini and Giuliani 2023). Such classifications distinguish several clusters of social groups, with groups members assumed to share more commonalities with fellow citizens from their own cluster rather than with other groups. A first group of this kind is what can be termed the ‘leading elite’. While it appears delicate to provide a precise definition for this particular cluster and to encapsulate the role it is playing in twenty-first century democratic capitalism, it appears safe to posit that those who have strong economic power – notably, actors sitting in the driving seat of corporations – form the core of this group (see Perrow 2001, for the case of the US). Current Western societies comprise small sets of citizens holding an extraordinary amount of both economic and cultural capital, combined with a disproportionate share of political influence (Hartmann 2018; Styhre 2022). Importantly, these capital owners co-opt, or coalesce with, highly skilled sections of upper middle-class citizens who fill executive positions in corporations, political institutions and certain parts of civil society. In Goldthorpe’s terms, these sections are composed of profes-

sional, administrative and managerial employees, all located in privileged positions within the social hierarchy. Drawing roughly on recent calculations and without considering national specificities, this compound cluster can be gauged to represent up to 10 per cent of the population in advanced Western countries.

It should be noted that the transition to the post-industrial age has altered this elite's composition. With the growing importance of both the financial sector and new media industries, giant corporations (and their owners) seem to set the tune. The last decades have seen a boom in the number of international billionaires holding gigantic amounts of stocks invested in businesses worldwide (Crouch 2011: 49–70). That said, the 'increased visibility of cosmopolitan super-rich elites' (Morgan 2016: 206) tends to conceal the persisting national embeddedness of the bulk of these elites (Hartmann 2018). Studies suggest that this top elite tends to be increasingly closed (Mihályi and Szelényi 2019: 73–85), meaning that it is more difficult for 'outsiders' – even from the upper middle classes – to join in. With a (more or less) sharp rise of the super-rich's share in domestic national products (Piketty 2013), these elites are seen to have a growing influence on politics and the society more broadly (Garsten and Sörbom 2017; Hathaway 2020; Birchal 2021). Indeed, it appears that the power of capital owners and those mandated by them (that is, top managers) has increased overall during the last decades at the expense of other social groups – which is often glossed over by studies into recent dynamics of social stratification (see, for instance, Mau 2015 and Reckwitz 2020, each dealing with Germany).

At the risk of oversimplification, one can state that, in the post-industrial configuration, the large remainder of the Western European population falls into four clusters which overlap with distinctive social milieus. This conceptualisation resonates with Gilbert's (2017) perspective in dealing with the US – notwithstanding that his typology resorts to specific demarcation lines. The four clusters differ concerning the achieved level of material wealth acquired through birth, during working lives and sometimes through inheritance (with all this influencing well-being in later life). The attached milieus are a stronghold of special cultural identities – even though, in this respect, inter-class boundaries are not always clear-cut. Concerning the size of these clusters, a very crude estimate would be that each of them represents between 15 and 30 per cent of a given national population, bearing in mind that international differences in proportions are remarkable (Goedemé et al. 2022). Although the four clusters share commonalities with neighbouring social strata, contemporary sociological scholarship suggests that boundaries between them are perceivable and have, in some respects, even become more salient in recent times (given, for instance, a more pronounced tendency towards assortative mating, see below). It holds true that subsuming manual and non-manual staff – as well as firm owners and employed managers – under one distinctive category is controversial (for a discussion see Brooks and Manza 1998 [1977] or Giddens 1991). However, differences between the clusters may be significant in terms of social power and human capital, hence this categorisation appears reasonable.

Thus, current Western European societies exhibit a cluster that feels more or less close to the economic elites and which one can refer to as traditional upper middle class. From the understanding put forward above, this cluster corresponds to Goldthorpe's category of independent and intermediate workers who embrace a wide range of occupations, among which are traditional professionals, middle management staff, skilled manual workers with leadership roles, self-employed people or owners of small businesses on a secure higher income. Accordingly,

the respective social milieu exhibits some cultural heterogeneity. Part of this group is attuned to the elites' 'bourgeois' tastes and cosmopolitan orientations while other constituents of this cluster show more materialistic, culturally conservative, or even 'chauvinistic' attitudes. Scholars studying the evolving social stratification of Western societies argue that part of this milieu has been put under strain in recent times. Since 'big business' has become more powerful in the wider economy (see above), the running of small businesses seems in many cases to be more challenging; hence, (perceived) risks of status loss and downward mobility have engendered uneasiness in this community, particularly during economic turmoil or with regard to expected intergenerational transitions. Long established blue-collar workers seem to feel most unsettled in this respect (Iversen and Soskice 2019: 222). The notion of a shrinking middle class, quite popular in the recent sociological literature (e.g., Kurer and Palier 2019), fits the situation of this population in the first instance, although it is unclear how vigorous and enduring related trends are, or will be, in the future (Milanovic 2016; Vaughan-Whitehead 2016; Besharov et al. 2016). Irrespective of the fact that it is not always clear whether, regarding the social position of the traditional upper middle class, status loss is a real danger or just something people are only afraid of, this trend is often blamed for the upsurge of populist political forces in many parts of Western Europe.

A further cluster, which some scholars refer to as the academic middle class (McAdams 2015) or 'sociocultural workers' (Gherardini and Giuliani 2023), presents quite different features. Its rise since the 1960s has often been deemed a major indicator of Western modernity's transition to the post-industrial age (Giddens 1991). Within this cluster, material living conditions often resemble those of the aforementioned group, although, some sections of this cluster never achieve the level of wealth attained by the traditional upper middle-class citizens. Following the Goldthorpe typology referred to above, intermediate white-collar occupations and service professionals form the building block of this group. Experience with tertiary education is widespread here. The cluster stands out by its well-entrenched cultural capital and by a privileged access to higher-skilled jobs held in both private firms and state administration, including the human service sector. In twenty-first century Western Europe, the bulk of this social group adheres to culturally liberal values, which is also confirmed by studies on the political preferences prevailing in this cluster (Gethin et al. 2022). The drive towards individualisation, discussed earlier in the book, has been very salient in the related milieu (Siza 2022, chapter 3). This materialises in post-materialist values, a pointed choice of special life-styles and a strong desire for personal distinction (see Fevre 2016; Beck and Beck-Gernsheim 2002; Reckwitz 2020).

The orientations prominent within this milieu have recently been found to clash with attitudes of other categories of citizens. This observation has been a significant issue in the debate about new (global) tensions between progressive and traditional factions of the middle class which are said to come with a 'cultural backlash' against current processes of modernisation. Some scholars have argued that the academic middle class has been a major carrier of what they refer to as 'neoliberal progressivism' (Fraser 2019: 11–12). This notion alludes to this social milieu's partial complicity with ideas propagated by the business elites, for instance enthusiasm for the role of markets in a customer-led economy and consumer-driven public service settings (Mau 2015). At the same time, part of the new academic middle class is 'not keen on promoting equality' (Iversen and Soskice 2019: 241). Moreover, educational competition is often harsh within this cluster – and seems to have grown with the perception that the

social status achieved therein is (more) insecure in post-industrial times. That said, it would be misleading to consider this social milieu as being entirely indifferent to issues beyond personal concerns – as insinuated here and there (see e.g., McAdams 2015). Thus, part of this milieu ‘defends the welfare state and requests better protection for the losers of globalisation’ (Siza 2022: 16), feeling attached to basic universalistic values such as the human right to ecological well-being all over the globe. In some European countries, powerful green parties have become major spokespersons of such orientations during the last decades. Moreover, members of this cluster often express a preference for enhanced and improved public service provision, which may also translate into claims for (more) redistributive social policies (Garritzmann et al. 2018; Abou-Chadi and Hix 2021; Gherardini and Giuliani 2023).

A third cluster prominent in the social structure of twenty-first century European societies can be named lower-middle class. This term is quite prominent in the more recent scholarship (see Milanovic 2016: 20; Kevins et al. 2019), even though many publications lack definitions going beyond income data or proxies to classify job skills. Throughout the Anglo-Saxon world, informed observers would refer to this group as the (old) ‘working class’, while elsewhere, this notion is rarely used either in the public sphere or by mainstream sociologists. In the terms of the Goldthorpe typology mentioned above, the related cluster consists of lower grade employees with (simple) supervision roles, on the one hand, and (moderately) skilled manual workers and routine non-manual employees, on the other. With the transition to the post-industrial configuration, it proves hard to draw clear demarcation lines here because part of this population shares commonalities with the camp of long-settled blue-collar workers and self-employed citizens, including those with an academic background on a low income.

A typical characteristic of this cluster is modest wealth combined with social vulnerability. One can speak of modest wealth insofar as people subsumed under this category are either in permanent employment (maybe with few and short interruptions) or are living with household members who ensure a flow of income sufficient to make these people participate in mass consumption on a regular basis. At the same time, these people are socially vulnerable in certain respects (Caraher and Reuter 2017; Bonvin et al. 2023). The reasons for this include having under-median wages, poor job protection, occupations under the pressure of technological change, a lack of savings (which may hit people hard in the event of a sudden personal crisis such as divorce, work incapacity etc) and paucity of cultural capital, for instance, when there is a need to enter a new occupation or when people require social ties to advance.

While some of those belong to academic milieus – for example, self-employed artists or university students – may find themselves in a similar economic position (at least for a while), nevertheless, the lower middle class differs from the former in cultural terms. Without buying too strongly into stereotypes, one can say that, compared with academics and professionals on a modest income, lower middle-class people display less individualism concerning their personal life projects, have rather materialist attitudes and an interest in long-term security and show a stronger attachment to ‘virtual identities’ disseminated by the public media, for instance those associated with commercial mass products. At the same time, collectivistic orientations towards public institutions are relatively widespread in this cluster, as are pro-redistributive attitudes (Paskov and Weisstanner 2022) – at least concerning fellow-citizens deemed to belong to the ‘native’ population (Hofmann 2016). With greater social conformism, atypical living conditions are experienced as a threat (Dörre 2019), which may in turn increase the disciplinary effect of such living conditions (e.g., the prospect of losing a job). Due to both

changes in the labour market and the de-securitising effects of past welfare reforms, vulnerability is assumed to have grown within this milieu since the 1980s. A major background for this is the creeping devaluation of manufacturing jobs (Kurer and Palier 2019). For people from this segment, working conditions are often precarious, including in those jobs that offer a decent income (Smith and Halpin 2019). Vulnerability also resides in economic risks (such as the volatility of demand) being shifted to employees, for example, by means of flexible hours in work settings or performance-based pay arrangements. More generally, the fate of the lower middle class is influenced by the transformation of the political economy of Western capitalism as charted above, that is, a loss of bargaining power or of support from political spokespersons (Streeck 2009; Morgan 2016; Elsässer et al. 2021).

A final cluster to consider is the post-industrial underclass. This notion, quite prominent among US scholars (e.g., Gilbert 2017), is certainly debatable as it has pejorative connotations and is sometimes seen to insinuate that people classified in this manner behave in unsocial ways. Moreover, the term has been used to demarcate various categories of people, including along racist lines and for political reasons (Wacquant 2022). That said, notwithstanding the fact that class boundaries in the lower ranks of the Western population are not clear-cut, there is value in using the term as a 'neutral' heuristic to demarcate divisions among these ranks during recent decades (Wilson 2006). The related concept resonates with classical accounts on social marginalisation (featuring notions such as troubled families, sub-proletarian workers, dependent poor etc), yet, it has gained a special meaning with social change producing new categories of strongly disadvantaged citizens after the heyday of industrial capitalism. Thus, sociologists have used the term to connote new patterns of urban poverty, the extension of unprotected and low-paid precarious jobs, as well as risks of social isolation due to long-term employment and a lack of social networks (Lash 1994; Mingione 1996; Castel 2000; Perelman 2019). In the thus defined social milieu, precarious lives go hand in hand with extremely low income, longer-lasting dependency on welfare (benefits), a structural lack of 'marketable' skills and scarce cultural capital. Furthermore, the experience of social risks is particularly salient for this population, given that episodes of long-term employment (with some lasting over many years), recurrent fixed-term employment contracts (including those with temporary work agencies) and enforced part-time work combine to entrap many underclass citizens in social positions far below the average of the working population.

Underclass people in twenty-first century Europe, while sharing some cultural orientations with the lower middle class – for instance consumerist attitudes – do often not participate in the life of public institutions. They also have limited access to mainstream mass consumption, which induces the threat of social and spatial isolation (e.g., in deprived neighbourhoods, see Wilson 2006). Internationally, immigrants – especially those having arrived recently to their host societies – form a relevant sub-group of this category and constitute the core of what is coined the 'gig economy' in recent sketches of post-industrial labour markets, thus filling jobs in dispatch services, digitally organised public transport or food delivery (Woodcock and Graham 2020). A further sub-group, overlapping with the aforementioned one, is (mostly female) domestic workers (Jokela 2019). While foreign-born citizens are strongly represented in this overall population, 'native' citizens from the same class background have at times been found to be particularly hostile to them. Altogether, a good deal of these underclass citizens can be considered as 'outsiders' trapped in inferior labour market positions and strongly disadvantaged in other spheres of life.

## 5.2 NOVEL COMPLEXITY: INCONSISTENT DISPARITIES, NEW COMMONALITIES

The status system established in Western societies has always been prone to consolidate social divisions established during the long history of modernisation, notwithstanding that the final stages of the industrial era had seen a robust trend of collective upward mobility. In important respects, the post-industrial configuration continues to accommodate the social reproduction of class hierarchies, which is driven by intergenerational transmission and assortative mating, among other things (Platt 2016). However, some trends shaping the transition to the post-industrial configuration make a difference to the inherited class structure of the industrial age and create complex disparities in the social fabric of twenty-first century Western Europe. In some ways, they are at odds with classical understandings of social stratification in democratic capitalism. Hence the ‘five-cluster’ model presented above does not tell the full story in regard to recent dynamics of social change in this part of the world. Compared with earlier times, social inequalities are often more diffuse or inconsistent, even as the last decades have seen important cross-cutting transformations.

Thus, along with the increasing diversification of occupations and life course trajectories in the post-industrial configuration, a person’s private situation has a greater bearing on individual life chances when compared with the heyday of industrial modernity. A case in point are more varied preferences and new options concerning family life broadly speaking (Toulemon 2016; Naldini 2023). True, the majority of the (younger) Western population still seems in favour of living in a longer-term partnership and raising children. Under the previously mentioned socioeconomic and cultural conditions, decisions in this realm are often only postponed, partly because young people are faced by states of insecurity concerning their life course and the expected flows of income. Nonetheless, over the last decades, the advent of the ‘post-familial family’ (Beck-Gernsheim 1998) and the related conduct of life – shaped by the facilitation of divorce, the building of patchwork families and greater choice options for same sex couples or singles – Western societies have bred a new, post-industrial organisation of the private life-world. In terms of social disparities, this pan-European ‘pluralization of family life’ (Naldini 2023: 93) makes a difference to what the breadwinner model implied during the heyday of industrial modernity. For example, lone parents (mostly younger mothers) have been a rapidly expanding population in Western Europe, incurring high risks of becoming poor just because of this civil status (Bradshaw and Nieuwenhuis 2021), especially in a context of limited childcare facilities. At the same time, however, the respective individual situation – which can affect different social milieus – may change quickly during a given life course. With a new partnership or a patchwork family, the above risks may be mitigated or disappear. Hence, the socioeconomic condition of non-married parents can be quite dynamic in the twenty-first century.

The partial ‘normalisation’ of dual earner arrangements – a typical feature of twenty-first century European societies – has complex consequences as well. As during the industrial age, a person in a precarious job does not necessarily belong to a society’s lowest income strata, as she or he may be living with a partner who shares his or her (higher) revenue over a longer period. However, in twenty-first century Europe, this connects with extra-marital cohabitation in many cases, hence a separation has immediate repercussions in terms of income. Concomitantly, parents committed to the ‘full’ dual earner model incur risks of social depriv-



tion which can be higher than those faced by less affluent couples not attracted by this model. Related decisions seem to impact on the stability of intimate relationships, with the above arrangement provoking an increased conflictuality within ‘post-industrial’ families (Grönlund and Öun 2010) even as life-satisfaction may be greater when one of the two earners works part-time (Beham et al. 2019). As mainstream family policies are geared towards expanding the dual earner model (Ferragina 2019), the latter affects people in disparate ways. This also pertains to life course opportunities for child-raising families as opposed to childless parents. Overall, when compared with earlier times, the material well-being of Western European citizens is more contingent on the evolving situation of a given household.

Furthermore, compared with earlier periods of modernity, cultural capital has special ramifications in the post-industrial configuration. For example, twenty-first century societies comprise a larger group of persons with an academic background who, even those living alone, cope better with material precarity than citizens lacking this kind of capital – thus, university students (in countries with no tuition fees) or artists often find themselves in more comfortable zones than low-paid blue-collar workers when being on the same level of income. At the same time, someone who has strong academic skills and is self-employed on a decent income may nonetheless live in a socially vulnerable situation, for instance when faced by a sudden decline in orders from customers or living with a partner in a precarious economic situation.

Differences in a person’s embeddedness in social networks matter as well, for example, when someone needs informal support in the event of work incapacity or long-term care-dependency (including after retirement). To some degree, access to such support nowadays depends on personal circumstances regarding family relations and social contacts, given that the traditional care model based on clear family responsibilities is about to erode in most parts of Europe. In this context, people higher up the social ladder may particularly suffer from poor local connectedness, given the increased spatial mobility of these citizens and their offspring. Concomitantly, despite the fact that social inequalities prior to retirement continue to make themselves felt during the silver age, demographic trends affect older people from different classes in similar ways (Harper and Leeson 2019) – by inducing, for instance, a longer stage in the life course shaped by care needs or an extended use of public services, that is, a more pronounced reliance on welfare state institutions over many years.

Arguably, many of the aforementioned complexities hinge upon the evolving gender model in Western societies. These societies are, if slowly and incrementally, heading towards the end of what Beck and Beck-Gernsheim (1998) once labelled the truncated (halved) modernity, that is, a state of fundamental inequality between men and women regarding options to carve out their respective life courses. Compared with the heyday of the industrial age (and previous epochs), contemporary females in Western Europe are less dependent on male ‘breadwinners’ and enjoy an enhanced influence within major societal institutions – certainly so in the universe of organised welfare provision. Furthermore, major political institutions are committed to pro-active gender mainstreaming. That said, entering the third decade of the twenty-first century, gender inequality has remained a ‘big issue’, appearing in a new guise in various instances. Thus, Europe-wide, one can still identify a gender pay gap (although it is slowly decreasing), with the dispersion of wage earnings among partners impacting on decisions related to career building and labour market participation. Moreover, the still widely unequal distribution of ‘reproductive’ (domestic and care) work among men and women has novel implications in the context of a partial dual earner-model in terms of strains on a parent’s

well-being and mental load (Daminger 2019). This is often intermingled with problems experienced by mothers exposed to enforced part-time work (Nicolaisen et al. 2019).

Further complexities reside in movements of educational expansion (Barakat and Shields 2019). Compared with the industrial age, a much larger cohort of young people attains high school and university degrees. While this movement started earlier in the twentieth century, it has seemed to accelerate in the new millennium. The general level of cognitive skill has increased quite dramatically over the last decades, with the current generation becoming involved in trajectories of life-long learning (Oliver 2018). On the one hand, educational competition is fierce in this context, giving rise to new status hierarchies, even as social divisions continue to impact strongly on educational achievements (Thompson 2019; Jackson 2021), in some places even more so than in the past (Chmielewski 2019). On the other hand, enhanced educational skills are sometimes understood as being a further leap in the process of human civilisation (Spiel et al. 2018; Schofer et al. 2021), given the widespread assumption that education is amenable to the amplification of knowledge-based responsibility, the development of civic spheres enabling citizens to maintain or even improve modern institutions, as well as efforts to contain ethnic and cultural fragmentation (e.g., by anti-discrimination policies within the educational system). In light of this, educational expansion has inconsistent implications.

Concerning social risks in the sphere of gainful employment, post-industrial social disparities appear diffuse as well. True, the fact that corridors for social ascent have narrowed (as discussed above) seems to corroborate accounts observing clear(er) boundaries between insiders and outsiders in contemporary labour markets regarding the access to decent work. At the same time, however, work-related vulnerabilities inherent in the post-industrial settlement can affect living conditions at various income levels (de Stefano 2014; Gallie et al. 2017). In some European countries, moreover, younger citizens from different class backgrounds have become exposed to similar states of status insecurity throughout the new millennium, given the rapid spread of temporary employment and fixed-term contracts in many places (Kalleberg 2018). For better-skilled workers, this has been less of an issue with the transition into the 2020s, given a shortage of job candidates in many industries and countries. However, numerous employees in Europe have gone through an unstable employment trajectory during the last decades (Passaretta and Wolbers 2016). Concomitantly, with the transition to the post-industrial configuration, a growing proportion of middle-class citizens have been, or have felt to be, exposed to the threat of downward mobility (Iversen and Soskice 2019: 220f). Azmanova (2020: 157) refers to this assemblage as ‘precarity capitalism’ in which both these constraints and the related insecurity are not confined to underclass citizens.

At least in some respects, workers from a traditional working or lower middle-class background have shared a common destiny with underclass people in recent times – which belies theories of ‘dualisation’ that have mushroomed in the scholarship dealing with new dynamics of social stratification (Emmenegger et al. 2012; Schwander 2019; Natili et al. 2023). While, in twenty-first century Western Europe, more fundamental threats often concentrate on the lower strata of the working population, class boundaries are less effective in sheltering alleged insiders than proponents of these theories want us to believe (Doerflinger et al. 2019). This holds irrespective of the fact that some sections of the post-industrial workforce, for instance public sector employees or sought-for professionals with special skills, have remained secluded from the aforementioned pressures or manage to defy them. Indeed, with an increased power of economic elites, employees from different backgrounds, including those holding a permanent

contract, have become exposed to similar constraints. At their workplace, this has materialised in expectations of just-in-time availability, fluctuating salaries, pressures to accept long hours and imposed spatial mobility. The same holds for the effects of labour market or pensions reforms during the last decades, as these reforms have entailed less job (status) protection and reduced retirement provision for various social groups (see Siza 2019 or Eichhorst and Marx 2019). In this context, fears regarding future living conditions seem to be shared by different social strata, including a growing section of the independent business sector composed of small firms and freelancers.

Concerning the development of lifestyles, post-industrial class boundaries are diffuse as well. While important cleavages persist between the social milieus portrayed above, some of the deep-seated cultural divisions of the industrial age have become blurred in recent times (Katz-Gero 2017) – concerning, for instance, the differentiation (and overlapping) of individual tastes, the popularisation of certain leisure activities, or the evolving role of mass media-driven fads and fashions. Granted, the upper class continues to be a major ‘trend-maker’ in various respects, including by disseminating popular imaginaries that, at least de facto, endorse the capitalist economy and its commercial spirit (Streeck 2012: 9–12). By the same token, the academic middle class exhibits distinctive cultural orientations, as argued above, driven by a strong (though diversified) desire for social distinction. That said, people from the same social class may have quite different tastes and leisure preferences in twenty-first century Europe. Nowadays, it is easy to spot cultural orientations spreading across social milieus, with international pop music or commercialised football being prime examples. Created by a highly developed media industry, such orientations come and go in a ‘volatile atmosphere of flashing fames, flickery fads and freak franchises’, as Bauman (1995: 5) already noted a long time ago. Nowadays, options for ‘consuming life’ (Bauman 2007a) span many different social milieus – notwithstanding that the underclass has very limited resources to realise these options on a greater scale.

Altogether, twenty-first century post-industrial societies in Western Europe exhibit complex patterns of social stratification. Divisions within the working population are obvious – including with respect to cultural issues. Yet over the last decades, movements of social change have blurred previous boundaries while reinforcing others. On the one hand, social disparities and more individualised life situations have increasingly occurred within social groups, with this triggering movements of de-collectivisation. On the other hand, people from different social milieus share novel commonalities, including when it comes to the role of institutional regulations and welfare state frameworks. Overall, it appears that the most disruptive dynamics have taken shape in the middle-class segments of European societies, that is, those which are sometimes deemed to constitute the majority class in these societies (Mau 2015; Siza 2022). In a nutshell, the post-industrial configuration appears to be impregnated by a ‘middle class paradox’. On the one hand, all middle-class milieus – though finding themselves in different power positions and with different levels of income – have access to ever more sophisticated goods and services that enrich their day-to-day life in important ways. They can participate in mass consumption and enjoy the flavour of the mouth, concerning, for example, information technology products or events offered by the leisure industry. On the other hand, when compared with the heyday of twentieth-century industrialism, various sections of this camp (have to) live with enhanced risks of downward mobility or even the prospect of social vulnerability (e.g., related to housing, see Clair et al. 2019). Especially those anchored in the traditional

(upper) middle class feel threatened by the developments depicted above. These dynamics also occur because, over the last decades, welfare state reforms have made the future more uncertain for various strands of the population (Betzelt and Bode 2017, dealing with the case of Germany). All this is likely to have complex implications about how Europeans behave when it comes to seeking a society-wide social balance in contemporary democratic capitalism.

## 6. Transformations in politics and civil society

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As discussed in the introduction to this book, the modern age has brought forth institutions with a mission to ‘civilise’ human relations in the context of large-scale industrialisation and urbanisation. Up to the present time, such institutions have shaped processes by which collectivities organise the distribution of material and symbolic goods, with this impacting upon life opportunities and scope for personal self-direction. Historical experiences tell us that underlying processes of ‘interest intermediation’ are fraught with asymmetries of power and largely driven by what influential social groups understand as being their own concerns. At the same time, these processes embrace activities geared towards finding socially balanced agreements, some of which have a potential for empowering disadvantaged fellow citizens and compensating human hardship. The bulk of such activities take place in politics and the universe of civil society. Consequently – when dealing with the foundations of the post-industrial configuration as the ‘backstage’ of organised welfare provision – transformative dynamics in these societal spheres are of the utmost importance.

### 6.1 POLITICAL ‘MAINSTREAMING’ AND BIASED DEMOCRACIES

Twentieth century Western societies (after World War II) have often been depicted as being shaped by a conflict between democratic politics and capitalist markets (Streeck 2013). Democracy became a lever for embedding capitalism, providing citizens with opportunities to raise their voice and make claims going beyond mere property rights. Parliaments developed into a major arena for devising regulatory frameworks by which Western societies created the institutional foundations of what became referred to as the modern welfare state. In continental and liberal European countries, social democratic and labour parties proved an important backbone in this process, whereas the development in Nordic countries was shaped by a welfare state consensus between political forces representing different social classes. Under these conditions, parliamentary and electoral politics fostered the expansion or consolidation of welfare state programmes writ large – notwithstanding that major political movements were transformed into bureaucratic ‘office-seeking apparatuses’ (Stråth and Wagner 2017: 167). In essence, this set-up has survived the transition to the post-industrial configuration from the 1980s onwards. Democratic opinion building has continued to revolve around welfare state issues, with the reference to ‘human rights’ becoming ever more prominent. Welfare bureaucracies erected during the twentieth century have persisted far and wide, taking care of various programmes, allocating benefits and services to citizens and operating outside the realm of the capitalist economy. Some scholars, like American political scientist Christopher Pierson (2001: 80-104), considered this as an almost automatic, enduring feature of democratic politics in advanced Western nation-states.

However, the welfare state literature reviewed earlier in this book suggests that Pierson, and those drawing on his diagnosis, miss the full story (McChashin 2016). For one, in some parts of the world, capitalism has flourished without Western-style democratic institutions and nonetheless develops with the help of welfare state institutions. At the same time, many world regions – for instance parts of Eastern Europe – have seen what political scientists refer to as democratic backsliding (Waldner 2018). Tendencies of authoritarian rule have even surfaced in the United States. Secondly, with the transition to the post-industrial age, political competition in Western Europe has become much less concerned with ‘taming’ the twists and turns of modern capitalism. Almost two decades ago, British sociologist Colin Crouch (2004) argued that Western nation-states were about to enter an era of what he coined ‘post-democracy’, with ‘the vital energy of the political system’ disappearing ‘into small private circles of economic and political elites’ (as restated in Crouch 2019b: 126). He observed that governments and major parties in office formed a pro-market and business-friendly hegemonic policy mainstream, with no ‘serious’ programmatic alternatives in sight. In this context, policy-making became ‘expertocratic’ and a mere technical endeavour, with one result of such ‘democracy without choice’ (Ruiz-Rufino and Alonso 2017) being a (perpetual) decrease in the political participation of major welfare state stakeholders. While Crouch’s diagnosis has remained controversial among political scientists (see Merkel and Kneip 2018), various scholars concur with the general observation that democratic processes in Western Europe have undergone such political mainstreaming in various instances (Schäfer 2013; Foa and Mounk 2016; Fraser 2019; Daxecker 2023). This trend is seen to happen at the expense of lower-class citizens, with many political decisions being skewed towards upper occupational and educational groups (Elsässer et al. 2021; Ferragina et al. 2022). In this sense, European polities in the twenty-first century seem to be more ‘biased’ than during earlier periods of democratic capitalism.

It holds true that, in some respects, politics seems to have to become more polarised in the Western world more recently (Kriesi and Hutter 2019). With the international rise of political authoritarianism and right-wing populism from the 2010s onwards, public dissent and support for political forces vowing (allegedly) alternative policies have mushroomed. Almost everywhere, right-wing populist parties have transformed the wider political landscape and processes of alliance formation in parliaments (Gamble 2019). Related tensions pervade social groups featuring similar material living conditions – which implies that the political foundations of democratic capitalism are frayed in twenty-first century Europe. However, this polarisation and the underlying ‘libertarian-populist division’ (Iversen and Soskice 2019: 240) are not fully incompatible with post-democratic policy-making. Firstly, the rise of right-wing populism is often understood as being rooted in the creeping loss in legitimacy of major political institutions during the 1990s and 2000s when a de-politicisation of government action provided fertile grounds for this ‘opposition’ to thrive (Schmidt 2021). Secondly, right-wing populism, though having a stronger impact than in previous times, has in most cases remained an outsider within the polity of Western European societies – although it has come to participate in some coalition governments (in Scandinavia) or even to rule one bigger country (Italy). Thirdly, the new populists are only slightly – if at all – opposing ‘mainstream’ regulatory concepts when it comes to the socioeconomic organisation of contemporary societies, which is illustrated by the above examples. On the whole, major political forces – at least those able and willing to form governments – are still impregnated by such concepts at the beginning of the third decade of the twenty-first century. For instance, the more market-oriented organisa-

tion of welfare state institutions writ large – which, over the last decades, has been promoted by centre-left and centre-right governments alike – is taken for granted in most European countries and welcomed by those forces who dominate these countries' polity (Jessop 2022). True, right-wing populism has attracted the interest of a broad alliance of supporters including the better entrenched blue-collar workers feeling economic, social or cultural insecurity; relevant segments of the 'underclass'; and some quarters of the conservative upper middle class. A good deal of this alliance is abhorring the agenda of what is internationally called the 'liberal left' (or neoliberal progressivism, see above), that is, the latter's openness to 'immigration, globalism, feminism, environmentalism, and preoccupation with LGBT rights' (Guth and Nelsen 2021: 455). That said, their common (alleged) opposition against the ruling elite has developed without consistent perspectives concerning the governance of democratic capitalism. Rather, the glue knitting this heterogeneous mass are xenophobic and sometimes anti-feminist sentiments. In this sense, it adds to the 'bias' in the current political underpinnings of democratic capitalism.

At the same time, political movements willing or able to resist this development have become weaker with the transition to the twenty-first century. Thus, most social democratic parties in Europe have become part of the pro-market mainstream (as discussed above) while others have also lost ground in the wider political landscape (Manwaring and Kennedy 2017; Manwaring and Holloway 2022; Fifi 2023). In some places, more radical leftist forces have filled the ensuing gap, (re)positioning themselves (mostly) at the margins of the political establishment (Amini 2016; Bull 2020). Here and there, green parties have become important players in national politics, representing larger sections of the new academic middle class (Grant and Tilley 2019) – albeit with a strong focus on ecological issues. Concomitantly, centre-right parties, while often remaining in power, have lost parts of their electorate. To some extent, traditional party cleavages, anchored in an 'economic division between the interventionist working class left and the market supporting middle-class right' (Guth and Nelsen 2021: 454) have become blurred with the transition to the post-industrial configuration. It seems that, in the new millennium, a great many of those living in contemporary democracies 'no longer have strong social clues to indicate a political identity for them' (Crouch 2019b: 127).

That said, variables related to social structure still seem to 'have the largest explanatory power on party choice in the most advanced industrial societies' – and, at least in central Western regions, 'cleavage voting' has remained quite salient (Knutsen 2018: 245; 255), even as traditional ideological allegiances and underlying normative orientations have not died out (see Gherardini and Giuliani 2023, highlighting international variety in this respect). Attitudes toward welfare state programmes are a case in point (Roosma 2021). Despite a 'a pro-welfare state rhetoric' (van Kersbergen and Vis 2014: 203) in the public sphere, gaps remain obvious between social milieus concerning what they find desirable in terms of benefits and services. Thus, there is evidence for classical transfer policies being supported most by low-income and low-educated people, besides those subscribing to left-wing attitudes (Garritzmann et al. 2018). Part of this group also advocates 'welfare chauvinism', that is, the idea of withholding welfare benefits from immigrants in order to use them for 'native' citizens (Mewes and Mau 2013). Wealthy citizens and those subscribing to conservative and authoritarian values have other priorities. They often support policies which put pressure on unemployed citizens (and the underclass) while opposing social redistribution. Commitments to foster human service

provision are more-widespread and can also be found with citizens higher up the social scale, not only within left-leaning sections of the academic middle class. All this implies that classical welfare state issues continue to engage different social milieus in different ways.

## 6.2 SHIFTING INFLUENCES IN CIVIL SOCIETY

Those arrangements by which a given nation-state ‘handles’ its public affairs closely align with the changing architecture of civil society. The latter is often viewed as a crucial factor in the modernisation of Western societies, as it constitutes a social sphere in which citizens collaborate to develop practical initiatives and conceptual solutions responding to problems or concerns they share or deem relevant to others. Just as the political system, however, this sphere is subject to social change. Historically, groups operating in this sphere were often found to defend interests and worldviews of those in higher-ranking social strata. Yet in many cases, movements and organisations in this universe were not only ‘schools of democracy’ – in the sense of Tocqueville (1945 [1831]), but also a source of ‘egalitarian demands’ (Klein and Lee 2019: 63). In this vein, they (more or less) influenced those agreements that underpin democratic (welfare) capitalism in the Western world (Rasmussen and Reher 2019).

Importantly, the democratisation of European societies during the twentieth century was endorsed by different camps. A major driving force was the labour movement and its organisations. True, in those strands of the international literature that carry an Anglo-Saxon imprint, trade unions have often been understood as economic interest groups (e.g., Heery et al. 2012) – based on the assumption that they concentrate on collective bargaining and the formation of homogeneous interest coalitions (see Hyman 2001, chapter 1). However, when considering Western history, there are compelling reasons to conceptualise unions as a pillar of civil society since they have often become involved in the shaping of the wider societal order, by building communities of discourse and associational forums. Whether based on connections with social democracy or focusing on industrial action and mass protest related to social issues, labour organisations have addressed and found a broad(er) audience in many instances. Frequently, their strategies explicitly address a lower-class rank and file; elsewhere (for instance in France), they lack this kind of membership but are, at critical historical moments, capable of mobilising wider sections of the population to defend a common cause.

Up to the heyday of the industrial age, trade unions in Europe had grown into powerful organisations, representing important segments of the working population (Therborn 1995: 115–19). Initially, better-skilled blue-collar workers employed by ‘big industry’ were their major backbone. During the last decades of the twentieth century, many public sector employees – including those having gone through higher education – joined these organisations. Progressively drawing on a more diversified rank and file, labour organisations became repeatedly involved in public policy-making during this period, hence their institutional role went beyond mere wage bargaining. While defending interests of current and potential members, unions often did, and still do, take an interest in societal issues at large. Thus, they have liaised with political partners and developed concepts for regulatory frameworks relevant to various populations – with some quarters even showing commitments to organise ‘solidarity for all’ (Durazzi et al. 2018; Clegg et al. 2022).

Since the 1980s, however, labour organisations across Western Europe have seen a strong decline in both membership and influence, with this affecting their role in both industrial



relations and politics (López-Andreu 2019; Arribas Camara and Cárdenas 2022; Waddington et al. 2023). Scholars explain this development by the wider transformation of the (political) economy, inducing a shrinking role of manufacturing industries, a decline of bargaining coverage, as well as growing diversification of the working population, with young cohorts and workers in new occupations less willing to join unions and to participate in industrial action. Exceptions from the Nordic countries confirm the rule. An additional driving force has been a (more or less comprehensive) ‘liberalization of industrial relations’ (Baccaro and Howell 2017: 172), beginning in the 1980s. Thus, some countries launched political reforms to hamper industrial action (see, for instance, Ford and Novitz 2016, dealing with Britain). Furthermore, employers – most prominently those from the new service industries – have been found to engage in union busting or to withdraw from industry-wide social bargaining in various parts of Europe.

With regard to trade unions as a player in civil society, all this has come with various ramifications. The most essential one is what Western (1995) labelled ‘working-class disorganisation’ some years ago – which is a development where greater sections of the working population become decoupled from member associations speaking on their behalf. Concerning the surviving strongholds of Western trade unionism, the ‘disconnect between a minority of unionised workers and the majority of unorganised workers’ (Baccaro and Howell 2017: 34) has elicited a debate on unions becoming organisations for labour market insiders (see also Durazzi et al. 2018, for a critical discussion). A further ramification has been an ‘increased level of employer discretion’ at firm and industry level (Baccaro and Howell 2017: 50), together with a growing influence of business organisations in politics (Crouch 2004; Garsten and Sörbom 2017). Given the (much perceived) risks of downward mobility as discussed in the previous subchapter, all these dynamics buttress the frequently observed crisis of the traditional blue-collar middle class and seem to have stimulated political sympathies for right-wing populism in recent times (Iversen and Soskice 2019, chapter 5). It remains to be seen whether the partial revival of labour activism in parts of the Western world from the late 2010s onwards (see Cornfield 2023, for the case of the US) will break this long-term trend.

The development of other sections of civil society stands in stark contrast to trade union decline, yet there have been shifting influences here as well. As early as in the 1990s, some scholars trumpeted a ‘global associational revolution’ (Salamon 1994), that is, a strong increase in the number of civil society (non-profit) organisations and a broader participation of the latter in the governance of public affairs (Lang 2013; Klein and Lee 2019). While in twenty-first century Europe, only a minor part of current associational activities addresses social welfare issues strictly speaking, this trend does affect organised welfare provision as well, given the surge of public interest groups defending interests of users, of associational action combating forms of non-economic discrimination and of new types of charities supporting all sorts of disadvantaged citizens (Flöthe and Rasmussen 2019; Breeze and Mohan 2015). Here and there, this extension of civil society has also included radical social movements defending utopian projects (Hardt and Negri 2017; Cohen et al. 2017) – although the bulk of civic engagement concentrates on single issues. To be sure, both the architecture and development of the civil society landscape differ strongly within the Western world (Salamon et al. 2017). However, the fact remains that – when comparing the heyday of industrial modernity to the situation in the new millennium – the contemporary realm of civil society is more densely populated and more vibrant than in earlier times (Rasmussen and Refer 2019).

It needs to be noted, however, that various Western countries have seen new movements and associations expressing ‘uncivil’ opinions when seen through the lens of modern ideas (Arato and Cohen 2017). Driven by anti-democratic and xenophobic attitudes in many cases (Castelli Gattinara and Pirro 2019), these groups – which often belong to the realm of right-wing populism – are opposing the liberal left’s agenda mentioned above, but also more traditional approaches to solidaristic collective action (e.g., those of the labour movement). Their success, facilitated by the opportunities offered by the new social media, hints at both ideological dissonance between the traditional and academic sections of the middle-class universe in Western societies (Iversen and Soskice 2019: 222–5) and a growing propensity of lower-class citizens to tread ‘on those below’ (Hofman 2016), for instance socially marginalised groups and immigrants. Where anti-liberal movements propagate a nativist approach to the organisation of social life broadly speaking, they break with the welfare consensus achieved during the heyday of the industrial era and, by extension, with the universalistic ethos of Western democracy.

In addition, associational life in twenty-first Europe does not cover all social milieus in the same way. As can be inferred from studies dealing with the demographics of volunteering and membership in civil society organisations (Smith and Wang 2016), the upsurge of associational activities over the last decades has hardly reached the lower strata of the population. As a good deal of those involved in these activities have a middle-class background, the post-industrial configuration seems distinctive in that it empowers certain strands of civil society while stymying others. This feeds into a partial metamorphosis in this universe which then adopts a more ‘bourgeois’ character overall. Indeed, major contemporary social movements in Europe espouse values in line with what is popular among the better-educated communities, even as old and new forms of benevolent action frequently build on wealthier sections of the population. In this vein, self-help groups, donation-based charities and social entrepreneurs have gained ideological prominence in both the public sphere and the discourse of political authorities addressing civil society issues. Conversely, when compared with the heyday of the industrial era in Western Europe (after World War II), the twenty-first century contains less space for those more classical social forces that are sympathetic to mass welfare programmes and institutionalised wealth redistribution, including associations defending the interests of welfare-providing non-profits (Bode 2011). Under certain circumstances, these associations still manage to be ‘political changemakers’ (Segaard 2023), yet in most European countries, they seem to be less willing, or able, to oppose trends such as the (partial) commercialisation of organised welfare provision (which is documented in Part III of this book).

This observation chimes well with a debate in contemporary political sociology which foregrounds the role of culturally progressive ideas in the wider public sphere of Western societies and the fact that, in parallel, traditional milieus and lower social strata feel excluded from the governance of common affairs (Norris and Inglehart 2019). In this debate, the mainstream agenda of civil society is often seen to sidestep major socioeconomic disruptions affecting important sections of this population – which is also a major thread in accounts dealing with the surge of right-wing populism in Europe (see above). Some scholars even cast doubt on the frequently presumed intensification of civic agency in post-industrial times, arguing that, from the 1980s onwards, collective self-direction by public deliberation often ‘was emptied of substance’ (Stråth and Wagner 2017: 191) – which is an assertion resonating with Colin Crouch’s perspective on post-democracy.

Be that as it may, the chemistry of twenty-first century civil society in Western Europe differs from that in the industrial era. In the latter's heyday, both membership and personal involvement in associations and unions were often long-term, notwithstanding that many organisations exhibited a rather hierarchic structure and a 'passive' involvement was commonplace. More recent forms of volunteering and civic action diverge from this pattern (Evers and von Essen 2019). Thus, it has been found that civil society activism – despite considerable variety both intersectorally and internationally – has become more self-centred, and in many cases more instrumentalist as well (Hustinx 2010). While pro-social action involving personal sacrifice remains widespread – and is even growing in some areas – long-term commitments to, and enduring engagement with, civic associations have become more exceptional. Incentives to participate in activities connecting with a given stage in the life course (being a student, a young parent, someone seeking career options) remain important, yet voluntary work over long periods seems more unlikely to occur. Overall, (better-educated) middle-class citizens are found to deploy a more reflexive attitude towards the self, which is fuelled by changes in the political culture of democratic capitalism (see Chapter 2 of this monograph). A good example is the conceptualisation of freedom. Being a major reference of modern thought, the prevailing understanding of this notion has 'turned increasingly individualistic' (Stråth and Wagner 2017: 193). The emphasis is placed upon options for spontaneous choice and 'exit options' which sits uneasily with the idea of systematic collective democratic deliberation in the search for socially balanced agreements within contemporary nation-states.

A further characteristic of post-industrial civil society in the Western world is an enhanced influence of corporate actors. Their representatives have adopted new roles in spheres outside the classical market economy. Major levers for this are elitist philanthropy and operations under the label of 'corporate social responsibility' (Frynas and Yamahaki 2016). Compared with the decades following World War II, strategic fundraising and projects pitched by rich donors have become more critical to the viability of many non-profit organisations internationally (Alexander and Fernandez 2021, for the case of the US). When private funders provide a large share of the latter's resource base, they tend to set the tune concerning the nature of civic activities or at least to define yardsticks for evaluating outcomes, measured for instance in terms of so-called 'social-return-on-investment' (Arvidson et al. 2013). By propagating these concepts and 'selling' them to foundations or public procurement agencies, social forces close to the upper classes increasingly participate in shaping the agenda of civil society organisations, including by interventions at a global level (Vogel 2006). To some extent, this implies a return of pre-modern approaches to regulating voluntary action – notwithstanding that, in the case of corporate social responsibility, contemporary patterns differ from older ones insofar as the involved economic actors may feel compelled to market themselves on benevolent grounds in an ever more mediatised public sphere.

The influence of corporate actors on the non-profit and voluntary sector works in more subtle ways as well. Over the last decades, this sector has, worldwide, become infused with 'commercial thinking'. A clear expression of this is the booming concept of social enterprise, pervading both charitable endeavour and human service provision (Gidron and Hasenfeld 2012; Bode 2013; Powell et al. 2019). The basic idea of this concept consists of creating and running organisations which live on 'earned' income and use this revenue for increasing the well-being of disadvantaged groups (e.g., workers or users) or for sharing profits among members (similar to the approach of cooperatives). Organisations from this universe are often

expected to compete with for-profit businesses or to accept significant economic risks, given their dependence on capricious stakeholders, including those driven by philanthropic concerns. Internationally, activities run by more professionalised civil society organisations are nowadays (expected to be) carried out in a business-like manner. In welfare-providing sectors, they are re-conceptualised as products sold to consumers on competitive welfare or charity markets. Likewise, more traditional forms of charitable action have come to depend on commercialised fundraising campaigns in many places. To be sure, the vision of economic independence is often unrealistic for classical welfare-providing organisations. Concerning contemporary welfare sectors in Europe, fully fledged social enterprises are of little importance in mere quantitative terms. However, the influx of the respective ideologies into concepts of civil society can have strong repercussions on the organisations' inner life – and may contribute to their associational character being thinned out in a number of respects (Maier et al. 2016).

Overall, dynamics in the civic and political sphere, broadly speaking, combine with economic transformations and shifts in the status system of European societies to alter the backstage of those institutions and organisations which will be portrayed in greater detail in the two following sections of this book. These dynamics are likely to have repercussions on the making and re-making of welfare arrangements in twenty-first century Europe, and, more precisely, on the devices and 'makers' involved in this process. Taking these dynamics into account will help to decipher the development of democratic capitalism in the context of ongoing social change while exploring an interest in the fate of those crucial ideas which this book conceives of as principles of social modernity.

## PART III

# Evolving devices: regulatory frameworks and directions of institutional change in European welfare states

## OVERVIEW AND APPROACH

This book section engages with those institutional arrangements that modern societies have ‘invented’ for the organisation of social welfare broadly speaking. The starting assumption is that, in the context of democratic capitalism, these arrangements epitomise agreements among the members of a given (national) community and make public policies responsible for certain aspects of human well-being. This results in outcomes that differ from what free markets (would) allocate to citizens in terms of tangible resources. In modern times, such agreements materialise in special devices, including publicly defined regulatory frameworks. The latter comprise what is commonly labelled welfare programmes or policy schemes but also legal rules imposed upon economic actors – for instance prescriptions concerning minimum wages, protection against work accidents or occupational pensions. Such programmes or schemes also contain provisions that shape the role of specialised organisations, such as healthcare services, labour administration units or social work departments (see Part IV of this book). Non-written rules play a regulatory role as well, for example normative orientations held by human service professions. Such rules can be viewed as being informal institutional arrangements that impact upon organised welfare provision. All these rules and frameworks give shape to distinctive welfare sectors in which benefits or services are granted on a (more or less) regular basis.

The following analysis is devoted to the related set of devices and their development over time, in order to decode major characteristics of organised welfare provision in Europe and their development in the late twentieth and the early twenty-first century. A vast array of scholarly publications is revisited with a focus on three stages of a (modern) person’s life course (see the Introduction to this monograph). Adopting both a cross-national and a cross-sectoral perspective, this exercise contributes to illuminating the evolving institutional foundations of democratic capitalism. The analysis expands on recent meta-accounts of welfare state change (e.g., Kuhlmann and Blum 2020; Greener 2022; Nelson et al. 2022) and developments in human service provision or social work (e.g., Gray et al. 2012; Bonvin et al. 2018; Grell et al. 2022) insofar as it yields deep(er) insights into the collective mechanisms through which the devices of modern welfare states take shape and are evolving further. In abstract terms, these mechanisms consist of meta-values (normative principles), regulatory provisions (benefits or services; conditions to receive them), policies (changing rationales; reform agendas) and moderating circumstances (social change impacting upon values, provisions and policies). In what follows, institutional developments triggered by these mechanisms are characterised by

using the analytical grid presented in section one. The methodological approach underlying the investigation is outlined in the box below.

### ANALYSING EVOLVING DEVICES FOR ORGANISED WELFARE PROVISION – THE RESEARCH TECHNOLOGY FOR THIS SECTION

To elucidate devices used to organise benefit schemes and human service provision, this section of the book relies on a wide-ranging inspection of published scholarly work. The data set comprises a large pool of policy and field studies from the social sciences (broadly speaking), including government reports or grey literature. The studies were found by using conventional search engines and references contained in them. Numerous sources are cited throughout – some are country- or area-specific, while others have comparative or historical character. In technical terms, conventional tools of qualitative document analysis were applied (see Bowen 2009). The central operation consisted of synthesising evidence inferred from the above sources, with a focus on three operational agendas: empowerment in child and family welfare, decent work and employment protection and arrangements for a secure and save later life. Similar to the analysis of primary documents, the material was explored by sampling, skimming, summarising and classifying relevant information on the basis of ‘sensitising concepts’ inferred from theoretical contributions to the subject areas under study.

Importantly, the analytical grid developed in the first chapters of this monograph was used to deepen the theoretical understanding of observed developments in the light of social modernity’s values. Fundamental to this were insights into the nature of extant devices in terms of benefits and conditionality, the character of regulatory change and the way institutions combine with their wider environment to unfold impact. Particular efforts were made to ensure findings were comparable, including in the international perspective. For instance, information on entitlements to benefits and services was ‘filtered’ by insights into the quality of the services provided, as reported from (further) studies. The analysis also paid attention to the wording of extant institutional rules, as well as to information about how these rules were understood and applied in a given context. An overarching lens through which the findings were interpreted was the direction of institutional change in terms of achievements and setbacks. To gauge relevant implications of evolving welfare arrangements, the evidence was contextualised by (qualitatively) correlating it with observations on movements of social change as presented in the ‘background analysis’ in book Part II. In this sense, the (comparative) institutional analysis undertaken had a hermeneutic dimension (Prasad 2002).

In essence, the next chapters are guided by a two-tiered research question: how do regulatory frameworks developed in the recent past ‘match’ with the principles of social modernity, and how do recent developments of institutional change impact upon this fit? On the one hand, the analysis covers overarching policy areas such as child and family welfare systems, employment protection and income replacement schemes, as well as programmes providing pensions and elderly care. On the other hand, the investigation digs deeper into the evolving ‘inner

logic' of extant frameworks and engages with selected subfields which have long appeared to be located at the periphery of the architecture of mainstream welfare states, namely child protection, active inclusion schemes, as well as arrangements for domiciliary personal care. These subfields are understood to represent critical zones of social modernisation in the twenty-first century, for at least two reasons. First, they reflect evolving cultural expectations on the quality of welfare provision as they go beyond both mere financial redistribution and the satisfaction of fundamental human needs (for instance, public education, access to a decent income, provision of bodily care). Secondly, the areas under closer scrutiny have flourished amidst recent trends of social change, because of economic dynamics or transformations related to altered forms of labour market integration; more disruptive patterns of family life; or a greater spatial distance between generations. Hence, these areas are highly relevant when studying the current influence of the principles of social modernity as defined in the first book part.

## 7. Growing up: welfare for the youngest and empowering childhoods

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When dealing with social modernity and its promise to promote the well-being of citizens independently from the fluctuations of economic life, it appears reasonable to start by considering welfare arrangements for young people. Concerning these arrangements, the commitment to enabling children to grow up under sheltered conditions is deeply anchored in the mindset of European societies. Related precepts feed into collective norms that spark public policy-making and, by extension, shape the orientations of occupational groups entrusted with meeting the above commitment. Arguably, this is anchored in a widespread social expectation according to which children are ‘human becomings’ and should, therefore, receive support for developing an independent personality (Peleg 2019). This cultural agenda includes an offer that no one can refuse, that is, opportunities to learn within educational institutions. Moreover, it implies the right of being protected from ‘unacceptable’ harm, and, at least in theory, public efforts to prevent material hardship during childhood – even though this latter commitment appears more diffuse in the contemporary Western world. Internationally, the above commitment has translated into the creation of various social benefits and welfare services (see Abrahamson et al. 2005 or Eydal and Rostgaard 2018), for instance, family welfare allowances and social work facilities.

Earlier in this book, the rationale underlying such initiatives has been depicted as being inspired by the vision of an empowering childhood. Indeed, collective responsibility for creating equal opportunities for youngsters has been an influential mantra in modern times, often driven by the conviction that human development in the early years is obviously determined by the social environment in which people live. The social sciences have provided ample evidence suggesting that early socialisation is a strong predictor of subsequent individual life chances (Kulic et al. 2019: 559). At the same time, children are judged to be ‘innocent’ regarding their early life course and seen to deserve ‘empowering’ public intervention (Wallace 2001). This reasoning nurtures pedagogical concepts around the globe (Loizou and Charalambous 2017) and is, more generally, epitomised by the idea of individual children’s rights (Freeman 2018; Peleg 2019).

Empowerment certainly proves to be a versatile and ambiguous term, as Martínez et al. (2017: 405–409) comment in their comprehensive literature review concentrating on young citizens. It is also a ‘contested concept’ (Starkey 2003: 273), since this ‘multi-level construct’ may apply to individual, organisational or community levels of human action alike. Furthermore, this construct comes with highly diverse connotations in political life. Thus, over the last decades, it has been used to justify the marketisation of welfare state activities addressing children, for instance, through voucher schemes which define parents as empowered ‘customers’ of care-providing undertakings. Concomitantly, the notion of empowerment undergirds ‘professionally defined and service-focused approaches’ to social public interven-



tion, most prominently in the universe of social work (Starkey 2003: 279). Beneficiaries are expected to gain ‘control and power over their own lives in their life contexts’ (Martínez et al. 2017: 408), including at their workplace and in arenas for civic participation.

Throughout Western modernity, the creation of childhood-related programmes and support settings has always been considered a public task and has resulted in various forms of organised welfare arrangements. Inspiring, among other things, initiatives of popular education or action against poverty, such programmes have often been created with the conviction that, regarding human becomings, ‘it is possible to influence the world’s transformation’ by enabling people to develop a capacity for self-directed personal or collective action, at a certain distance from a given ‘dominant hegemonic discourse’ (ibid: 411). From this perspective, child empowerment can be considered as a key dimension of social modernity. In light of (emancipatory) Enlightenment thought (see Part I of this monograph), both achievements and problems of the related policy agenda become particularly salient when regarding the life of smaller children. Therefore, the subsequent analysis will pay particular attention to this clientele, rather than adolescents – even though some of the observations made in the following subchapters apply to this age group as well. The analysis starts by observations on the modernisation of child-related welfare arrangements more generally. A more fine-grained portrayal of child protection systems in selected countries will follow.

## 7.1 SOCIAL MODERNISATION BY UNIVERSAL WELFARE POLICIES RELATED TO (HAVING) CHILDREN

When considering how child empowerment connects with the agenda of social modernity, a good starting point is work revolving around the notion of ‘children’s citizenship’ (Devine and Cockburn 2018: 144f; Baraldi and Cockburn 2016; Wallace 2001) and related institutional developments. Chapter 1 elaborated on Thomas Marshall’s approach to what he defined as cornerstones of democratic capitalism. His work also addressed ‘citizens in the making’ (Marshall 1950: 25), that is, the organisation of welfare provision for the youngest generation. Devine and Cockburn (2018: 143) note that efforts in this area were long predicated on the ‘acceptance of meritocracy and inevitability of social stratification’, as well as on the moral expectation that youngsters behave in obedient ways. While this particular framing is history, Marshall’s concept can still be viewed as impregnating devices through which contemporary children are (to be) empowered in the above sense, often in ways consistent with the vision of social modernity.

The wider scholarship on children’s rights in the Western world bears witness to growing concerns for child welfare even at global level (Kilkelly and Liefgaard 2019). The emphasis on child-specific citizenship rights aligns with an evolving arrangement of intergenerational ties and embraces the idea of providing child-related welfare entitlements to parents. Up to the heyday of industrial modernity, such entitlements were widely absent from the agenda of Western European welfare states, with mothers especially carrying a high burden regarding the upbringing of children. During this period, the institutionalisation of schooling was laying ‘at the heart of citizenship formation’ (Devine and Cockborn 2018: 146). The second part of the twentieth century then saw the invention of modern family policies and an incremental universalisation of welfare programmes related to children and their parents. In present times, access to childcare, early education and child welfare services are viewed as indispensable building

blocks for juvenile citizenship. The underlying movement of social modernisation culminates in demands to let children participate in public debates and to give them a voice for making their concerns heard, for instance in educational institutions.

The work of Chevalier (2016) suggests that welfare states have also developed instruments for what he refers to as ‘youth welfare citizenship’, albeit to a varying extent. Addressing young people at the transition to adulthood, Western European welfare states have created arrangements to improve their access to gainful employment. True, this access has become a thorny issue during the last decades, given an overall longer duration of post-school education and the de-standardisation of integration trajectories. However, special welfare arrangements react to this trend. They comprise income support packages such as education-related grants or loans, social assistance or income support schemes and family benefits paid beyond the childhood period properly speaking. Throughout Western Europe, Chevalier maintains, these devices connect with different states of ‘economic citizenship’ (that is, states of integration in the active workforce) and distinctive modes of human capital production. Some countries (have) remain(ed) reluctant to create the respective entitlements (e.g., via age limitations for family allowances and social assistance or a focus on student support schemes) while others are more generous (for instance by paying stipends to enrolled university students). Social policies in Europe continue to grapple with the phenomenon of school drop-out and early departure from education or training while being faced with a rising number of young citizens not in education, employment or training (NEETs; see Unt et al. 2021). Therefore, they have established programmes to contain this development, for example, by temporary job integration measures and short stays in post-school educational programmes (Ellison 2021).

Importantly, a good deal of material support for the younger generation in Europe is channelled through parents as it is organised by what is commonly referred to as ‘family policy’ – which, according to Daly and Ferragina (2018: 255), has been ‘among the fastest growing areas of social expenditure’ in recent times. This has come with more or less financial redistribution to families with children, but also a ‘move towards the reconciliation of work and family life’ (ibid: 255; 256). Nowadays, welfare programmes in this area include various devices to support ‘childrearing and the maintenance and care of children and adults’. The above authors, scanning long-range (reform) trends across OECD countries, conclude that the Western world, despite all differences, has seen strong commitments towards improving child-income support to families, extending parental leave schemes (concerning both the duration and the level of payment) and investment in early childhood education as well as publicly governed childcare (see also Saraceno 2022: 67–111). As for the latter, subsidy schemes have mushroomed in order to bolster non-familial childcare arrangements across various social strata.

With regard to formal childcare and preschool education, current Western European jurisdictions make use of various devices. These include public subsidies for service providers, the funding of (non-charged) ‘free hours’ of non-familial care, and programmes to improve input quality concerning workforce skills, staff/child ratios and quality assurance schemes (Elwick et al. 2018). In the new millennium, action to facilitate out-of-family childcare and a child’s participation in formal early education goes beyond mere legal initiatives, at least when regarding more advanced Western welfare states. Thus, a growing proportion of employers has been found to foster family-friendly working time arrangements for parents to enable them to attain an equilibrated work-life balance. According to findings by Chung (2018: 499), this has benefited various populations, with, for instance, no major difference between permanent

and non-permanent workers' access to flexible hours or periods off work. Chung submits that public childcare provision has often come with a simultaneous surge in occupational welfare (such as flexi-time awarded by employers) – with overall extended efforts as a result. Overall, the recent boom of early education has been remarkable internationally (Votruba-Drzal and Dearing 2017; Miller et al. 2017; Garvis et al. 2018; Paananen 2022), with related expenditure being 'on an upward trajectory' (Daly and Ferragina 2018: 263) almost everywhere. Besides enhanced income support, the growth of service facilities bears witness to ever stronger institutional efforts to unburden parents, notwithstanding considerable international variation in this respect (Willekens et al. 2015; Perlinski et al. 2017). Daly and Ferragina (2018: 267f) conclude that classical elements of family policy schemes have not been 'dismantled or replaced but, rather, progressively accompanied by new policy instruments which sometimes overshadow them'.

Kulic et al. (2019: 561) observe that, with the steep rise of childhood-related welfare programmes, 'boundaries between early education and care' have become fuzzy. At the same time, there has been a growing interest in involving children from lower class backgrounds in such programmes, prompted by hopes that this group would benefit most from them. Despite comparably lower learning efficiency and the 'considerable heterogeneity' in utilisation rates 'along ethnic and social lines' (ibid: 567), the participation of lower-class children in early formal education has increased markedly in some European countries, and sometimes with a significant (negative) effect on access inequalities. Many governments have declared their intention to raise these children's educational attainment and thereby to reduce 'their chance of falling into poverty as adults' (Lewis and West 2017: 334, with reference to the UK). From this perspective, family policy, broadly speaking, can be viewed as having become a major lever of progressive public policies in Western Europe, even as early childhood education and care is 'at a pivotal point in its history' – given growing expenditure and 'new programmatic, workforce, and curricular initiatives' (Kagan and Roth 2017: 138; 142), all indicative of strong commitments to the public orchestration of service supply in this area (Kulic et al. 2019: 567).

Irrespective of many difficulties, the respective policy agenda is a global one, epitomised by the millennium development goals propagated by the UNICEF. In Western Europe, the current range of devices geared towards child empowerment includes schemes as diverse as 'maternity and child health clinics, school health care, municipal day care, preschool and primary school' (Vuorenmaa et al. 2016: 290, referring to Finland). It also comprises family support programmes and social care for younger people, as well as special assistance to look after children and adolescents involved in the youth justice system (see Webb and Bywaters 2018, referring to UK budget categories). In addition, child empowerment is a potential result of welfare arrangements addressing the wider circumstances under which parents and educational institutions ensure children's 'psychosocial, physical, verbal and social development' (Vuorenmaa et al. 2016: 291). This observation is shared by the scholarship dealing with the concept of 'social investment' which is often deemed to (have) be(en) the dominant underlying rationale of recent social policies across Western Europe (Hemerijck 2015; Busemeyer et al. 2018; Nicholls and Teasdale 2021). While this concept has had ambivalent ramifications in various respects (see below), the idea of societies 'investing in human capital and capabilities' (Hemerijck 2015: 242) became very prominent in both the political discourse and government circles from the 2000s onwards. In essence, this mantra was driven by political intentions to ease the flow of life course transitions and improve the quality of the demand-side

of labour markets. It came with increased efforts to build capacity in care services and to assist families coping with challenges contained in the post-industrial life course, with related policies finding considerable political support across party cleavages and social milieus (see Garritzmann et al. 2018).

In the light of this, some observers even argue that (Western) European nations have become ‘child-oriented societies’ (Gál et al. 2018). True, when measured by mere social expenditure, public support to retirees proves superior in monetary terms. However, once the sacrifice of effort, social time and downward intergenerational transfers are taken into the equation, a comparatively high share of the collective investment ‘in people’ is nowadays dedicated to the young generation. As Gál et al. (2018) suggest, these ambitions – when measured in per-capita units and including informal effort – outstrip those flowing upward to elderly people. Hence child empowerment, promoted by a plethora of purposive regulatory frameworks, has become a major agenda in contemporary democratic capitalism. It is plausible to assume that this overall development has been fuelled by wider movements of social change, as depicted in the ‘background’ analysis provided in Chapters 4, 5 and 6 of this volume. Some trends – such as the growth of white-collar employment and the shift to post-industrial labour markets – have certainly contributed to the strengthening of child and family welfare systems. Thus, in the new millennium, the long-term process of educational expansion covers ever younger cohorts of the European population. Crucially, the economic elites (including capital owners) appear to have turned into major (political) stakeholders of enlarged educational programmes (Menashy et al. 2019) – and in some places, they have also become shareholders of service facilities for such programmes (Lewis and West 2017, for the case of England). Relatedly, there have been strong tailwinds for policies combining social benefits with incentives to place children in new, or extended, early education arrangements (this partially connects with the idea of welfare-to-work, see below).

Importantly, major sections of the contemporary Western European population endorse, and push forward, the civilisation of child education, which materialises, for instance, in a widespread ban on violent parental behaviour (Zolotor and Puzia 2010). The respective expectations towards the welfare state have grown far and wide, tallying with the pan-European mantra of ‘investing’ in children. The increasing (though socially biased) participation of civil society organisations in the governance of public affairs has backed the growth of both the educational sector and programmes addressing younger children (Petrella 2012; Wood 2017; Schinnerl and Greiling 2020). In some countries, such organisations have taken over (greater) responsibilities in the delivery of educational and family welfare services. Furthermore, internationally, powerful associations are lobbying for children – and their rights – to become a legitimate concern for public authorities and the wider society. All this has combined to fuel a process of social modernisation regarding the treatment of children.

## 7.2 COUNTER-MOVEMENTS: POLICY-RELATED BARRIERS TO EMPOWERING CHILDREN IN RECENT TIMES

The development of child welfare services and family policies in Western Europe over the last decades is not one-dimensional, despite the apparently strong normative influence of ideas rooted in both Enlightenment thought and ensuing visions of social modernity. Indeed, there is an abundant literature dealing with barriers to child empowerment in contemporary

Western Europe that points to ambivalent developments and unequal outcomes. A first issue is the resourcing of relevant public programmes. Despite the general trend depicted above, some of these programmes have been hit by the economic crisis breaking out at the end of the 2000s. More generally, in the new millennium, the gap between supply and demand in childcare provision is all too obvious in many European jurisdictions. Concerning the access to childcare, for example, related problems include the limitation of the number of hours free of charge or available services more generally (Lewis and West 2017; Kelle and Mierendorf 2020). In many places, the need for care services has outstripped capacity. At the same time, governments have been struggling ‘to meet basic quality goals’ (Kagan and Roth 2017: 144).

Similar dynamics can be found in the universe of child and family welfare services, for example, profound shifts ‘in resource allocation priorities’ (Webb and Bywaters 2018: 12, in the case of England). This movement has particularly affected services outside the education sector. A concentration of public efforts on ‘looked after children’ has often dovetailed with reduced support to programmes for ‘softer’ services, such as professional advice to families or community centres addressing children and young people (see the Subchapter 7.2 below). In some parts of Europe (predominantly in the South), programmes to empower children have been found to stall in this context (see Kalogerakis and Tsatsaroni 2022, for the case of Greece). This has affected less affluent populations in particular, for instance parents unable to afford high co-payments for childcare (Kazepov and Ranci 2017, dealing with Italy) or families unable to pay for private sector service delivery (Woodrow and Press 2018). Both traditional and newly available support schemes have been found to be unresponsive to ‘those who felt less empowered’ in their lives and find themselves ‘in most need of special services’ (Vuorenmaa et al. 2016: 208, presenting findings from Finland). Achievements concerning the socialisation of child rearing and related costs have often not kept pace with declared political intentions. This also applies to programmes targeting adolescents in transition from school to work. In this area, ‘the architecture of income support’ has been found to be ‘highly stratified’, with a focus on ‘groups in higher education’ and ‘only modest support to lower skilled youngsters who face high risks of school dropouts and end up in precarious jobs’ (Chevalier 2016: 14). A full ‘youth welfare citizenship’ has not been achieved in most parts of Western Europe.

All this suggests that initiatives run under the label of ‘social investment’ have either not delivered on their promises (Parolin and Lancker 2021) or even remained as an empty shell (Kazepov and Ranci 2017, for the case of Italy). What is more, it is often observed that related policies are biased – which hints at a second counter movement to social modernisation in the area under study. Trumpeting commitments to promote the young generation, programmes under the above label were often presented as being a policy innovation of the 2000s (see Bonoli and Natali 2012) – although, in modern times, educational activities and social support systems could always be considered as being an ‘investment’ in human beings. At the same time, many welfare programmes of the new millennium, prioritising the creation of ‘human capital to enhance economic goals’ (Devine and Cockburn 2018: 144), have added a special flavour to the traditional approach as they reflect a purposive movement from ‘a transfer-based towards a service-based family policy’ (Hakovirta and Nygård 2021, commenting on developments in Nordic Europe). Internationally, related programmes, extending early education outside the family (in the pre-school area), have come with ambitions to standardise educational activities within relevant settings (Alexiadou et al. 2022, dealing with Sweden and Finland). According to critics, these ambitions often undermine more holistic pedagogical

practice in these settings although such practice is critical to successful child empowerment (Hunkin 2019). Moreover, the social investment agenda is viewed to exhibit a productionist bias in that child empowerment is equated here with a mandate to make youngsters fit for the labour market. Tensions are also identified concerning the agenda's strong accent on 'promoting mothers' employment' (Lewis and West 2017: 333, referring to England), with current regulatory frameworks urging all parents to take up jobs regardless of related working conditions (for instance, shifts during unsocial hours). From this perspective, this agenda seems 'much less an expression of society's solidarity with families and children' (Daly and Ferragina 2018; see also Mätzke and Ostner 2010). Rather, the emphasis is placed upon strengthening 'market citizenship' – that is, the individual's capacity to adapt to what powerful market actors are searching for (Devine and Cockburn 2018: 144). At least, children have become structured as both 'dependents in need of protection' and 'products in need of development' (ibid: 149, with related policy initiatives being driven by 'economic interests ... rather than wider educational pedagogies' (ibid; see also Saraceno 2019)).

Thirdly, the international literature on child welfare policies observes a rising 'culpabilisation' of socially disadvantaged parents, reminiscent of traditional paternalistic approaches to family-related public intervention. As Devine and Cockburn (2018: 145) note in the case of the UK, the more 'individualistic approach to children's welfare' of the post-industrial era connects with a 'discourse of deficiency in parenting', meaning that the empowerment of children is decoupled from the empowerment of parents – notwithstanding that the two dynamics intersect in important ways (see Vuorenmaa et al. 2016). Even though Western European countries differ in the degree to which the above approaches come into play, family-oriented welfare programmes developed in the 2000s and 2010s have been found to resort to new instruments of 'governing the family', which risk enforcing a certain conduct of life (Tembo et al. 2021, for the case of Norway). Thus, in many instances, target groups must constantly report to welfare bureaucracies, including in situations when it comes to their engagement with gainful work. Related pressures can put strain on the lives of mothers or fathers and are likely to exacerbate extant trouble in the family which may impact upon a child's future.

Taking all this into account, the evolving regulatory frameworks in the area of family and child welfare seem to exhibit important shortcomings regarding ambitions to ensure an empowering childhood. Part of these shortcomings reside in the rise of (new) public management approaches putting strain on involved organisations and established networks, as will be spelled out later in this book. Consequently, frameworks with a potential to empower children – and to thereby realise ideas inherent in the vision of social modernity – have in many respects not become more inclusive over the last decades. Rather, in the new millennium, institutional developments combine with dynamics of social change to burden numerous children and families across Western Europe. This is due, first of all, to economic forces, most prominently those associated the precarious lives of lower-class parents (Bradshaw and Nieuwenhuis 2021). While child well-being and family wealth are not necessarily congruent (Main 2019), it stands to reason that developments in the wider economy – for instance the rise of a low-wage sector and of unstable work trajectories – have repercussions on less affluent families and, by extension, on the well-being of their children. Internationally, social policies have often failed to compensate for these developments, and in some countries, the 'children of austerity' (Cantillon et al. 2017) were hit strongly by cuts to welfare programmes during the 2010s. As Webb and Bywaters (2018: 205) note for the case of the UK, many young citizens were triply

disadvantaged during these times: ‘first, at an institutional level by public spending reforms; second, at home, through diminishing family welfare benefits, including in-work benefits ... ; and third, as members of society, with funding cuts disproportionately affecting services targeted to supporting them’.

Secondly, even where child-related welfare programmes proved to be (more) robust, available evidence suggests that the benefit of programmes related to early childhood education and childcare correlates strongly with the socioeconomic positions of parents, including their propensity to pay for childcare (Kulic et al. 2019: 558; 571). More broadly, it seems that the ‘link between children’s academic achievements and the socioeconomic status of their families’ has become stronger over the past 40 years. This holds even though differences in the institutional arrangement of childcare did – and do – have an impact in this respect, with less discrepancy found for countries in which early education is state-regulated and run by staff with higher (professional) qualifications (ibid: 559; 567). That said, ‘empowering’ forms of intervention – for instance, providing support to a child’s learning experience – have been shown to vary along with an adult’s occupational position, a parent’s experience of self-direction and the extent of autonomy in a given work environment (ibid, with a reference to Kohn et al. 1986). In the same vein, there is a strong class gradient to how much private resources are, or can be, spent on children. Related social divisions have grown, given higher divorce rates and extending single motherhood especially among lower class citizens while educational homogamy in partner choice has increased at the same time (Gál et al. 2018). For the lower strata of the population, socioeconomic vulnerability concurs with stress-ridden efforts to secure a better future for their own children despite scarce cultural capital. For these parents, available opportunities to raise children in an empowering manner are modest after all. Subjectively felt social insecurity adds to a weak position in the labour market (e.g., in terms of work contract status, see Chung 2018). Children from such households continue to have a high chance of failing when trying to access more prestigious educational institutions. For this population, then, the political hype with early education and more comprehensive schooling comes with enhanced risks of social marginalisation (Sarmiento et al. 2016; Tarabini et al. 2018).

Thirdly, notwithstanding considerable international variety, the development of the educational system in the Western world harbours an inbuilt mechanism of disempowerment, namely exacerbated educational competition (Lynch 2018). Parents and their offspring alike are often involved in an exhausting race to pole positions under circumstances which turn out to be child-unfriendly in many countries, with the worst examples being reported from East Asia. In Europe as well, the bar to jump over in order to achieve decent careers moves always higher up for all, and the relative value of certificates often decreases even for those who are doing well in that race. As mentioned earlier, moreover, new learning programmes tend to focus on a child’s marketable skills, with educational systems paying less attention to the formation of a versatile personality. Concerning children as future adults, social upward mobility appears more insecure in post-industrial labour markets (WEF 2020). In many instances, personal success is based not only on acquired skills, but also on market dynamics irrespective of educational attainments. True, most countries have seen a soaring demand for child-related human services, including care facilities under (more or less) public control (Garritzmann et al. 2018). The academic middle class in particular has become a vanguard for the dual-earner model and the renewal of the gender contract, in order to leave behind what was presented as ‘halved modernisation’ earlier in this book. However, when it comes to the educational

trajectory of their own children, part of this milieu seeks to avoid any co-education with socially disadvantaged pupils, and this is often considered as a potential stumbling block on this trajectory (Nast 2020; concerning exceptions, see Hernández 2019). Using options offered by an ever more consumer-oriented educational sector, the respective group of parents actively seeks opportunities to privilege their own children and thereby contributes to the gentrification of early childhood socialisation.

### 7.3 A PERIPHERAL BUT CRITICAL AREA FOR EMPOWERMENT: CHILD PROTECTION AND ITS DEVELOPMENT

A distinctive area relevant to the empowerment of youngsters is child protection services, which will be explored here in a more fine-grained analysis, with a focus on institutional characteristics of evolving regulatory frameworks across four European jurisdictions. The protection of children from harm, neglect and violence is one of the firmest commitments of the modern welfare state, notwithstanding considerable inequalities ‘in children’s chances of experiencing abuse and neglect’ (Bywaters et al. 2020: 196). Extant commitments are embodied in comprehensive legal prescriptions which are generally endorsed by the wider population and the political establishment. At global scale, children have increasingly been seen as carriers of individual human rights (for many, see Falch-Eriksen and Backe-Hansen 2018), with a general ban on educational practices susceptible to causing severe harm to children. In Western Europe, rates of physical abuse have decreased, yet child maltreatment has remained a pressing issue internationally, given an enhanced sensitivity to the neglect of children in their private life-worlds (Parton 2022). Both the perception of child victimhood and the fact that young people are defenceless have prompted the establishment of a ‘direct child-state relationship’ by which a society’s offspring are meant to be sheltered in systematic ways (Keddell 2018: 94). Worldwide, legal definitions of maltreatment have become ever more sophisticated, and as we shall see, the recent development of related devices is partially indicative of the spread of convictions which, to some extent, are contained in the vision of social modernity. Hence the area of child protection lends itself to studying the evolving influence of emancipatory Enlightenment values in Western Europe, including the aspect of the institutional organisation of interventions geared towards empowering the young(est) generation.

Advanced (Western) child protection systems consist of a core and an ancillary service infrastructure. Most systems comprise focal organisations entrusted with preventing child neglect and maltreatment in families or any other place hosting young people. Close to these (core) agencies are family courts or similar juridical bodies under extensive legal regulation. Once the aforementioned agencies conclude that children must be removed from their private entourage, these bodies are solicited to make formal decisions. More generally, the focal organisations are supposed to intervene in the event of harmful incidents and to keep at bay threats to the well-being of children (Gilbert et al. 2011; Merkel-Holguin et al. 2019). Services often concentrate on children in trouble or facing a complicated upbringing. Their activities may be highly intrusive, as in the case of a childcare order or the removal of children from their birth parents. Interventions may also include professional advice and support to at-risk families, that is, parents who might damage their offspring physically or mentally in the future. Modern welfare states have established public administration units responsible for these kinds



of activities, mostly in the form of regional or local social welfare departments (Burns et al. 2017). The workforce engaged with such activities embraces different human service professions, with social workers taking the lead in most instances. This staff may directly interact with parents and children when attempting to prevent or ‘cure’ neglect or maltreatment.

Agents may also work with external organisations providing special services to families, for instance companionship, advice and practical support. In addition, they are (expected to) liaise with others when collating information about a ‘case’, soliciting reviews from experts able to diagnose neglect and maltreatment or arranging measures in collaboration with childcare agencies, schools and other organisations. Other components of the child protection system include residential care facilities, foster families or outreach services run – or contracted by – welfare departments. This ancillary infrastructure of a child protection system may also include teachers, staff from early childhood institutions, family doctors, midwives and police officers – all of whom potentially participate in identifying problems in families or overseeing the further development of a girl or boy under observation. Child welfare charities or public interest groups concerned with the fate of young people are players in this universe as well.

Relevant regulatory frameworks are country-specific to some degree. This, for instance, pertains to the question of who is eligible for which kind of public support. One prominent distinction made in the literature pertains to the difference between a child-safety and family-service orientation in a given child protection system. The former is viewed as being highly intrusive, with judiciary devices as a primordial institutional instrument. In general, these systems dominate in the Anglo-Saxon world. The family-service orientation, prominent in the Nordic countries and some continental welfare states, leaves a greater role to social support services and their (potentially) supportive intervention (Berrick et al. 2017: 308). Accordingly, the relative strength of the various types of social intervention differs between national jurisdictions (Parton 2022). Thus, out-of-home care is frequent for (older) children in Nordic countries while less widespread in the UK where foster care is particularly prominent. Extant service systems are ‘being used for different purposes in different countries’ (Bywaters et al. 2020: 197) – for instance, when it comes to family support and initiatives to separate children from birth parents on a longer-term basis (including with respect to the role of voluntary parental consent). The following analysis examines four jurisdictions in greater depth. Evolving regulatory frameworks are sketched with the aim of assessing their major characteristics and recent dynamics of institutional change. The portrayals are based on both available comparative overviews and country studies, including work undertaken by the author of this book. The subsequent synthesis focuses on overarching commonalities despite different contexts, as explained earlier.

#### a. Norway

Norway is widely considered to be an international pioneer in promoting children’s rights and family welfare. Over the last decades, the country has remained committed to an ambitious child protection agenda (Skivenes 2011; Baran and Jones 2018; Turba et al. 2019). Norway’s welfare state is among the most generous in the Western world, featuring a large, publicly funded human service sector and a strong institutional anchorage of social-welfare professions. Public efforts to empower children started at the onset of the twentieth century, with an early ban on corporal punishment and a national framework for social intervention targeting families and children. An important milestone has been a ‘children act’, followed by a ‘child welfare’ act enacted in the 1950s. Subsequent decades have seen

further public initiatives geared towards catering for the welfare of children by distinctive (legal) devices. Since the 1990s, the underlying mantra has been that child welfare requires multifaceted social intervention, with an incremental policy shift ‘from protection to promotion’ (Skivenes 2011: 159). The result in the twenty-first century has been a large array of family and child welfare services, with comparatively generous public funding which also addresses ‘children that might be at risk’ (ibid: 172). Many services go beyond support to troubled parents and are geared towards combating children’s social vulnerability more generally (Malmberg-Heimonen and Tøge 2022). Most providers are public or non-profit, as commercial firms are sidestepped by many municipalities. However, there has been a period (mainly the first half of the 2010s) during which services were also contracted out to private businesses. Those sections of the child protection system that are based on a formalised procurement process predominantly comprise providers of residential care services which receive a special license from regional authorities (Pålsson et al. 2022). The institutional set-up of the child protection system is endorsed by well-organised interest groups, including those anchored in the non-profit sector (Segaard 2023). Throughout the entire system, child welfare workers constitute the dominant occupational group with a ‘quasi-monopoly regarding publicly approved professional knowledge’ (Turba et al. 2019: 2). By tradition, individual and team discretion is high concerning this labour force.

Concerning the system’s operational core, nationwide procedural standards apply, together with a general obligation for child welfare services to collaborate with other agencies and with users. A national directorate was established in the early 2000s to instruct a small number of regional units with a remit to oversee residential care settings, devise training schemes for foster home personnel and provide supervision to front-line child welfare agents. In the early 2020s, however, a management reform transferred part of the directorate’s responsibilities to local authorities. The responsibility for practical intervention has always been incumbent on municipalities, mostly with a focus on ‘help within the home’ (Baran and Jones 2018: 301). The administration of the Norwegian child protection system is highly formalised, with a remit that goes far beyond mere emergency action. Local public sector agencies are responsible for undertaking need assessments and orchestrating service delivery, including the arrangement of foster care or placements in residential institutions. In most places, the agents directly involved – as well as further human service professions, including those from the field of primary healthcare – operate under one roof. Their mission also includes the approval and monitoring of private (mostly non-profit) organisations entrusted with ancillary child and family welfare services. All statutory undertakings, as well as publicly funded human service organisations (educational institutions, healthcare organisations, etc.) are involved in a comprehensive reporting scheme, with strict duties to notify local welfare departments when a child’s maltreatment or neglect is observed or assumed. Notes of concern received by municipal welfare services give the latter a mandate to gather evidence (including the soliciting of testimony) and to find out whether further action is required. Local welfare departments must liaise with family courts, as out-of-home placements presuppose a care order that is decided and agreed by the two bodies. Voluntary placements are an additional (and common) option, since out-of-home care under parental authority is deemed to help preserve personal relationships and reduce the number of court cases. On the prevention side, the system is complemented by easy-to-access (family) counselling services, on the

one hand, and special financial support to ‘troubled’ families, on the other. Healthcare or educational institutions contribute to need assessments, and the police may become involved in cases of sexual or physical abuse. In earlier times, the system’s operational core was split into different administrative settings, one specialising in child protection and others catering for families in need (Turba et al. 2019). The latter had developed varying local approaches as municipalities have significant autonomy in this regard – whereas the former had been entrusted with streamlining practices across the entire territory. The aforementioned management reform then devolved greater responsibilities onto local institutions, but the fact remains that, throughout contemporary Norway, child protection activities, narrowly speaking, constitute a rather insular intervention domain within the wider social welfare field, in part because many ‘neighbouring’ welfare organisations fall under separate sets of national regulation.

Concerning (other) recent movements of institutional change, the last decades have seen ‘increased juridification’ (Skivenes 2011: 168) within the system, with attempts to develop or extend early prevention schemes and related procedural tools. Across the entire territory, community midwives have become involved in efforts to identify parents and children in trouble (Espejord et al. 2022). Furthermore, reforms have aimed at making users participate in the intervention process (e.g., via regular ‘family meetings’) and involving in that process a wider range of actors in contact with at-risk children. This may include, for instance, building ‘basic teams’ with representatives of schools or childcare organisations, health authorities and school psychology centres. Recent regulation has extended reporting duties towards any person who observes or suspects sexual or physical abuse. Concomitantly, referrals, aid measures and placements have grown in number over many years (although there has been a drop in the number of children removed from their home family after 2017). All this suggests that child empowerment has remained high on the agenda of the Norwegian welfare state, with services frequently blamed for not performing well enough.

That said, some facets of recent institutional change sit uneasily with the ambition to make the child protection system evolve in ways that would make empowerment activities in that field more seamless, comprehensive and effective (Hennum and Aamodt 2021; Olsvik and Saus 2022). Thus, the Norwegian system is referred to as remaining relatively intrusive with regard to the private life of families in trouble (Tembo et al. 2021). Parenting practices of disadvantaged citizens have increasingly been blamed as being irresponsible – which has a potential to constrain educational capacities of certain mothers and fathers or destabilise their lives (further). Moreover, concerning the core of the child protection system, a growing caseload in terms of notifications and emergency placements combines with a strong increase in paperwork (caused by more detailed procedural prescriptions) to reduce intervention capacities overall. Public agencies also experience growing pressures to involve a broader range of service providers from the (state-)independent sector – particularly in the areas of residential childcare or prevention activities. This is prone to undermine the unitary character of the system to some extent. At national level, a collaboration agreement between the government and the association of non-profit social service providers (enacted in the mid-2010s) has paved the way for the child protection system to become more pluralistic, as non-state service providers are solicited to provide a greater proportion of child and family welfare services. This may entail greater fragmentation within the

child protection system, adding to the internal complexity of the public pillar as mentioned above. In some places, the share of non-state (mostly non-profit) providers in the sector has been growing, with no systematic distinction being made between for-profit and non-profit undertakings in the national regulatory framework. While numerous municipalities eschew private firms, new public procurement rules have created a market for child and family welfare services and, by extension, a more complex architecture of the child protection system altogether. In this context, public initiatives to improve inter-agency collaboration sit uneasily with the well-entrenched lead role of public sector professionals. While facing an increased workload overall, the latter have increasingly become expected to share responsibilities with other non-state organisations and occupational groups. Potential results include administrative implosion and ‘overstressed’ intervention capacities.

#### b. Germany

Child protection is a well-established sector of the German welfare state, with the social work profession being a dominant player within a multi-tiered institutional architecture (Wolff et al. 2011; Witte et al. 2019; Bode and Turba 2020; Biesel and Kindler 2023). Basic legal frameworks were set-up in the 1920s and developed further after World War II. Initially, they featured more ‘restrictive approaches aiming to prevent immoral behaviour’ (Witte et al. 2019: 97) by parents and adolescents. The framework in force since the early 1990s – which has been amended a couple of times – places an explicit emphasis on services supporting at-risk-families, shifting (symbolically) the focus of the child protection system from controlling a child’s legal guardians to empowering parents and their offspring. In recent times, various reforms have aimed at extending the range of services and enabling the system to become more attentive to the intricate living conditions of families and children. Reforms have amplified reporting obligations within the educational and social welfare sector, entailing the creation of sophisticated tools to assess and document cases of child neglect and maltreatment. In this context, the entire regulatory framework has expanded markedly, with this bearing witness to a growing public commitment to child empowerment.

As for the system’s architecture, all German municipalities are obliged to run child welfare services and provide support to children or their families once their agents see a need for this, including ‘before child maltreatment occurs’ (Witte et al. 2019: 104). In practical terms, this mission is incumbent on distinctive hub units (youth welfare departments), which are institutionally separated from other human service areas such as primary healthcare. These units have a legal remit for applying diagnostic tools in the event of reported family problems. They also arrange placements in residential or foster care, as well as offering advice and in-home parenting services to families at risk. They also prepare cases for the family courts, often as the sequel to an emergency short-term placement. While public authorities are expected to deal with all (reported) child protection cases, they widely resort to non-state, mostly non-profit agencies when it comes to providing residential care or in-home parenting. It is only in some instances that the aforementioned hub units operate as a service-providing entity. Commonly, they initiate a service trajectory once problems have been reported and later on undertake periodical assessments of accomplished interventions.

Given this ‘bipolar design’ (Wolff et al. 2011: 196) of the German child protection system, there is a pressing need for the hub units to constantly orchestrate relations with

external bodies. This may also comprise need assessments, including the diagnosis of maltreatment. The related ‘outsourcing’ process comes with a comprehensive case management agenda, pushing these units to collaborate with other organisations, for instance in the preparation of court cases. In many cases, youth welfare departments provide non-state partners with a mandate to ‘cure’ maltreatment and neglect, whether by providing pedagogical advice, social work in the homes of families or residential care. Non-profit providers still perform the bulk of these interventions. The related ‘public-private partnership’ has developed as a quasi-institutional interface between civil society organisations and the German state, which social policy scholars often refer to as a ‘corporatist’ arrangement (see Bode 2011). During the twentieth century, this arrangement became based on both secure funding streams and an arm’s length public control of the services delivered. The state also conceded an advocacy role to these organisations, as well as space for developing provider-specific concepts, such as the idea of ‘multidisciplinary child protection centers’ (Wolff et al. 2011: 184), which was propagated during the 1970s. Special activities of these actors may also include advocacy for vulnerable families, ambitions to shelter users against ‘transgressive’ welfare departments and attempts to apply distinctive (e.g., anti-authoritarian) pedagogical models for social intervention in families.

Concerning recent movements of institutional change, a flurry of reforms has markedly altered the conditions for child protection work in Germany. The regulation enacted over the last decades embraces a fine-grained definition of child protection activities and numerous prescriptions concerning their orchestration. Thus, the legal framework has come to contain options for designing novel instruments for early intervention services at local or regional level (e.g., family midwives). More generally, a ‘zero error’ culture – designed to avoid misconceptions by child protection agents dealing with at-risk families – has pervaded the entire system. Within public welfare offices, there have been ambitions to make child protection work follow ‘preregulated procedures’ (Wolff et al. 2011: 184). Staff working in their environment (such as nursery or primary schools) have been obliged to nominate ‘child protection experts’ who have undergone special training (Fischer 2021). More generally, reforms have brought forth enhanced accountability to all parties involved in the child protection endeavour. Agents working in welfare and healthcare organisations as well as educational institutions are expected to participate in risk assessments and to report observations to the local hub agency. Such expectations may sometimes even extend to waste collection agencies, housing companies and bailiffs. In addition, there have been growing ‘pressures to streamline collaboration’ within local (partnership) settings (Bode and Turba 2020: 20). While collaborative activities have often developed randomly in many places, local authorities have set up ‘task forces’ with a remit to organise various partners into local network groups. As in Norway, referrals – and the number of families covered by the system – have grown in number over many years. In particular, the quantity of emergency placements has increased significantly in the new millennium. All these developments signal pronounced commitments to render child protection more effective.

However, similar to what has been observed for the case of Norway, the above administrative provisions have had ambivalent implications, among which are increased paperwork, higher caseloads and scepticism concerning the value of networking. In this context, agents have been found to become more ‘defensive’ in the sense of concentrating on formal procedures, including when collaborating with others. Moreover, reforms from the 1990s

onwards have sought to make the child protection endeavour (more) cost-efficient. The national legal framework stipulates that economic considerations must be included in local administrative practice, including contracts with non-state service providers. While these reforms have also fostered the creation of early support schemes (e.g., community cafés for young parents), such schemes are based on the expectation that they save costs, which ‘heavier cases’ would otherwise entail (via a higher workload for social workers). In some municipalities, youth welfare departments have embarked on price bargains (concerning rates per case, place and service hours) with external service providers while considering alternative partners, including those in the commercial sector. Overall, provider competition has remained implicit in most places, yet extant regulatory frameworks contain options for procurement bodies to elicit rivalry on the supply side and to ‘procure’ services without giving long-term securities to providers, as many contracts remunerate the latter on a per-hour basis or for case allotments. All this is indicative of a growing influence of a ‘New Public Management’ logic within the German child protection system, epitomised by steering tools which include competitive benchmarking, accounting schemes comparing financial outlays and short-term results (per case) as well as a streamlined and sometimes business-like organisation of public–private partnerships – with all these tools prone to ration(alis)ing social support and public intervention in the child and family-welfare field.

### c. England

The literature dealing with child protection in Britain bears witness to a long tradition of child and family-welfare services in this part of Europe as well (Munro 2011; Biehal 2019; Featherstone 2019; Lambert 2019, Purcell 2020; Thoburn 2023). Rooted in both charitable action and local social policies, public efforts to protect children from abuse and neglect date back to the end of the nineteenth century. Additional milestones were legal acts in the 1930s and after World War II (with further amendments, e.g., in 1989). Later reforms signal comprehensive commitments to prevent episodes of out-of-home custody and to promote a child’s upbringing by its biological family – but also a more interventionist approach placing the emphasis on child safety in the above sense. As special rules exist in the four nations belonging to the UK, the following concentrates on the child protection system in England. Within that system, the Department for Education (in the national government) proves a strong player when it comes to policy and procedural guidance. Overall, the social work profession and other occupations specialising in child protection appear well entrenched in the system’s institutional set-up. The regulatory framework in force gives each local authority a mandate to create children’s departments, consolidating responsibilities for children into one unified service. Nowadays this mandate stipulates that particular attention should be paid to at-risk parents, that is, citizens showing signs of poor educational attainment and ‘antisocial’ behaviour. This clientele is expected to exhibit a high propensity of child neglect and maltreatment, assumed to necessitate a compulsory – and sometimes long-term – removal of children from their family, including by adoption from care without parental consent.

While the English child protection system does not comprise a legal requirement for the mandatory reporting of suspected maltreatment, there is a strong moral pressure in this direction. This arises from professional and political bodies that produce guidelines and run inspection schemes. In addition, educational institutions (e.g., schools) are obliged to install delegates concerned with potential child welfare problems. Like elsewhere in

Europe, the key social administration units (children's departments) at local authority level (have to) comply with prescriptions contained in national acts, guidelines and practice frameworks. These prescriptions include a mandatory multi-agency child protection conference and child protection plans once agents have identified a need for social intervention. They also set a framework for care proceedings in the event of parents being considered to infringe educational responsibilities. A status of 'children looked after' is assigned to victims who are then entitled to various measures including out-of-home placements (in fact, only a small proportion of all cases referred to the child welfare department carry this status). In-home parenting is provided by public bodies in the first instance, albeit at a low level when compared with Norway and Germany. As for out-of-home measures, there is a widespread 'institutional' preference for foster (rather than residential) care. In a child protection case, some tasks may be commissioned to non-state organisations, yet family and welfare services provided by such providers are overall less widespread than in Germany.

Concerning recent movements of institutional change, the last decades have seen public investment in the actions and capacities of the child protection system, including for early intervention services. Attempts to better integrate healthcare and social service units at (local) state level indicate a potential for a more holistic approach to the child protection endeavour. There have also been efforts to accelerate the decision-making process in the family courts and to enhance monitoring activities, with a national 'inspectorate' overseeing local activities across the system. Compared with the end of the last century, a higher number of children have been subject to professional enquiry in the 2010s, with this involving a Child Protection Plan and, albeit less frequently, care orders. Concomitantly, the proportion of cases filtered out at the referral stage has decreased. Hence, regarding basic arrangements in this universe, the English child protection system seems to rely on a strong and increasingly bold commitment to protect the young(est) generation.

However, at the same time, considerable strain has been put on the English child protection system. This pertains, first, to the system's operational core. During the 2010s, many children's departments at local authority level suffered from cuts to their budgets, which also affected the core of the child protection system. These cuts are reported to have entailed delays in addressing family problems and bringing cases of child maltreatment to court, as well as much 'hot-desking and increased workloads' along with 'high staff turnover' (Rogowski 2021: 356). In this context, child and family welfare schemes have come to concentrate on the most critical cases while engaging with a 'top-down centralization of family surveillance mechanisms' (Lambert 2019: 86). Under the so-called 'troubled families programme', these mechanisms have often been imbued with an authoritarian spirit, to the disadvantage of parents already faced by difficult living conditions.

Secondly, the wider infrastructure of child and family welfare services (around the system's core) have been hit even more by austerity politics. Thus, public support to agencies promoting child well-being independent of problematic incidents – like the so-called children's centres under New Labour's 'Sure Start' programme (set up in the late 1990s) – have proved to be a short-lived episode (Purcell 2020; Webb 2022). Rather, after the outbreak of the financial crisis, England has seen a 'continuing prioritization of child protection work and the marginalisation of family support services' (Biehal 2019: 56; 58f),

as well as an increasingly stronger distinction between ‘heavy end’ child protection work, on the one hand, and early intervention in the lives of vulnerable children, on the other.

Thirdly, concerning procedural issues, the current focus lies on ‘perfect’ risk assessment rather than relationship-based intervention. For the involved agents, inspections have become more intrusive, with interventions being subject to numeric output assessments, payment-by-results metrics and best-practice governance schemes, all orchestrated by the central government. While this has boosted the number of Child Protection Plans and entailed a higher proportion of case proceedings (that is, cases brought to the court), the scope of welfare provision – including preventive programmes – has decreased (in terms of accomplished activities). In addition, welfare departments tend to divert more cases to non-state providers that often employ lower-skilled staff, with a pronounced New Public Management logic shaping both the internal governance of child protection units and the relations between procurement bodies and external providers (Pascoe et al. 2023). From this angle, recent institutional developments sit uneasily with the long-standing commitment to empowering children by impeding any mental or physical harm to them.

#### d. Italy

In Italy, child protection activities became institutionalised during the 1930s and turned into a professionalised branch of the welfare state after World War II (Del Valle et al. 2013; Bertotti 2016; Fazzi 2019; Bertotti et al. 2023). Quintessentially, the capacity for social intervention has remained lower than in Nordic and Western European countries, given the generally more modest public investment into human service provision. This particularly holds for the economically less developed parts of the peninsula (in the South). Importantly, the rehabilitation of ‘troubled’ family life has always been an outstanding objective of public policies. The prevailing norm was that, during problematic episodes in a child’s upbringing, kinship solidarity was activated before any intervention of welfare state institutions. This ‘family support’ orientation seems to have persisted up to present times (Segatto et al. 2023: 343). As the Italian child protection system is poorly resourced overall, however, public measures addressing children often amalgamate with small-scale programmes targeting troubled families, even as local welfare and judicial bodies focus on children in acute danger.

That said, the development of child and family welfare services was remarkable throughout the last decades of the twentieth century. These services had long been incumbent on religious bodies, with residential care institutions playing a primary role. The 1970s saw powerful social movements claiming deinstitutionalisation, feeding into attempts to replace huge care institutions by small community-based residential settings (referred to as community homes). These entities were providing various forms of assisted living for youngsters of different age groups and became the preferred type of substitute care throughout the country. Moreover, publicly funded family counselling centres were created with the aim of protecting and fostering mothers, helping with family separation and developing options for foster care. With laws enacted from the 1980s onwards, governments placed an explicit emphasis on a child’s right to flourish under decent conditions and on related parental duties. Local welfare units were established in all parts of the country with a remit to promote and protect children including by means of social support services. On a more experimental basis, public authorities have created integrated family



welfare centres, which are run by non-state organisations and pursue a mission to prevent child misery more generally (Balenzano 2021).

Within the current child protection system, the Juvenile Court plays a fundamental role. Mobilising experts from different disciplines (psychology, educational sciences), it largely contributes to shaping the care trajectory of vulnerable children. Reports to the Court are mandatory for any public agent observing irregularities concerning a child's upbringing. This especially holds for local welfare departments, once they are approached by parents or other informants. In turn, the Court may entrust welfare departments with organising activities according to its ruling. Following a settlement, such activities tend to be devolved to non-profit providers, with the latter's activities being based on small-scale contracts agreed with the regional council. Foster care is used for one out of two removed children in out-of-home care, a parent's opposition to this notwithstanding. Further (albeit less frequently used) options include community homes and domiciliary services to empower and 'educate' parents. Importantly, the Italian child protection system does not comprise a unitary core body in which competencies and professional expertise seamlessly mingle. Rather, this system exhibits a multi-tiered structure for social interventions. The responsibility for practical arrangements lies with the regions whereas municipalities orchestrate the provision of welfare services, including emergence care where urgent intervention is needed. Local arrangements vary considerably, up to the point that municipal agencies have repeatedly been accused of eliciting 'client manipulation' (Bertotti and Campanini 2013: 99), with the generosity and availability of welfare services sometimes depending on personal connections between users and public agents.

Recent movements of institutional change appear inconsistent. In the late 1970s, national policies crafted 'common standards of care' (Del Valle et al. 2013: 232) for community homes and similar institutions. A law enacted in 1997 explicitly defined rights and opportunities of young people, with commitments to take public action to improve their living conditions. The 1990s saw the expansion of specialised (multidisciplinary) welfare teams, entrusted with taking care of abused children, mostly under the roof of the regional healthcare administration body. While all these regulations did not specify procedures to be applied when it came to intervention measures, local authorities became obliged to compose a 'plan for children' and their well-being. A national reform passed in 2000 devolved major practical responsibilities to lower territorial divisions and stipulated that these were responsible for interventions targeting at-risk children. The latter were entitled to free public support, including (mental) healthcare. Furthermore, policies fostered model projects for the prevention of child neglect and tested new forms of social intervention, for instance the mentoring of at-risk families by fellow citizens. Altogether, local authorities have seen growing 'demands to improve abilities in assessing and designing precise treatment plans and goals' (Bertotti 2016: 986). Except during a short period, the number of looked-after children has increased over the last decades, with policies showing a tendency to upgrade the role of foster care in relation to other types of institutionalised care outside of the biological family. Seen from this angle, the institutional drive towards empowering children living under difficult conditions is undeniable in the recent history of Italy.

At the same time, public intervention in the welfare sector under study has been found to take a more authoritarian stance vis-à-vis at-risk families in recent years (Corradini and Panciroli 2021). In addition, the dominant trend since the outbreak of the financial crisis

has been the reduction of budgets earmarked for child and family welfare provision (see Hajjghasemi 2019, chapter 8), with a significant curtailment of those national funds that are devoted to local social service systems. Therefore, by the end of the 2010s, social workers saw ‘welfare services ... in severe crisis’ (Fazzi 2019: 3). Local authorities have reacted to the latter by outsourcing tasks to non-state undertakings, most prominently in the residential care sector where numerous local authorities are commissioning services after public tender. All this has entailed more ‘network interventions’ (Bertotti et al. 2023: 268) and collaborative challenges for those managing inter-organisational collaboration. While innovative projects in prevention and family welfare by non-state organisations abound, this contributes to ‘blurring responsibilities’ (ibid: 262) at the local level. In the same vein, public authorities sought to rationalise management processes by ‘separating financing from the provision of services’ (Bertotti 2016: 965). Regional variation in this practice notwithstanding, the mantra of ‘New Public Management’ impacts strongly upon the design of social support measures nationwide. In the new millennium, public social work has been entrusted with tasks of mere coordination and evaluation, rather than with direct service provision. In addition, national reforms during the 1990s have entailed a separation between healthcare professions and the social service units within local authorities, after a long period in which the two professions worked under one roof (including when dealing with child welfare issues). Furthermore, there is evidence of growing tensions between the (powerful) judicial arm of the child protection system and local welfare departments, with the former considering the latter as being deficient in routine operations. This is considered to reflect a ‘decreasing consensus’ on the role and contribution of public intervention and social work agencies (Bertotti and Campanini 2013: 114). Against this backdrop, the child protection endeavour in contemporary Italy appears to be more fragmented than in earlier times.

Quintessentially, cross-national developments in the field of child protection reflect a great deal of ambivalence when considering the global agenda of child empowerment. Despite apparent differences, related activities became viewed as being a professional matter in all jurisdictions during the twentieth century, even as public interventions to ensure a child’s well-being have expanded up to present times. This movement was fuelled by a strong international human rights discourse, with the United Nations as an important mouthpiece. A more recent expression of the related mantra has been the concept of ‘child centredness’, which places an emphasis upon a child’s right to grow up in a family (only) as long this proves beneficial to human development. This mantra, proliferating with a ‘tendency to individualise children and childhood’ (Forsberg and Kröger 2010: 3, referring to Nordic countries), also comprises commitments to involve children in any measure by which the state responds to neglect and maltreatment (Nolas 2015). Such commitments chime well with the ambition of creating ‘environments and practices that nurture and harness children’s agency’ (Parton 2020: 157, discussing the case of England) – notwithstanding extant ‘ambiguities and reservations about the precise role children ... should play as participants’, as well as ‘high levels of organisational, professional, and personal anxieties’ when it comes to dealing with these ambiguities (van Bijleveld 2017: 130–31). In the traditionally more rigid (Anglo-Saxon) systems, experts have voiced a shift ‘from a forensic child protection towards a greater child welfare orientation’ (Buckley 2017: 82). Elsewhere, the focus on the ‘rehabilitation’ of (vulnerable) families has become nuanced, given that the sheer potentiality of children being harmed in

their homes is viewed as being no longer acceptable (Gilbert 2011). Moreover, all countries have made efforts to downsize residential care, including those jurisdictions that had long placed a strong emphasis on it (as in Southern European nations). Also, in the new millennium, various jurisdictions have seen a ‘reorientation from child-protection towards ... prevention’ (Heimer et al. 2018: 317, see also Forsberg and Kröger 2010), in part under the influence of the social investment agenda depicted earlier (Maloney and Canavan 2022, dealing with Ireland). Accordingly, both early intervention schemes and action against the (alleged) failure of child welfare bureaucracies have been guiding landmarks for welfare reform internationally.

In many places, child welfare policies worldwide have progressively enforced the use of more detailed procedural standards, including where support to vulnerable children is provided at a great distance from public authorities, as in foster care. In earlier times (during the twentieth century), public regulation had left local agencies and professionals with much discretion in their interaction with families, according to a ‘common sense practical reasoning’ (Buckley 2017: 78, referring to Wise 1989). Contemporary administrative prescriptions indicate a growing concern for ‘correct’ interventions across all tiers of the child protection universe. This concern is also reflected by ‘public redress systems’, set up in some countries in order to provide families with opportunities to address grievances (Buckley 2017: 83). Relatedly, there have been initiatives ‘to make practice ... transparent ... so that any negative outcomes can be defended’ (Parton 2017: 5). In a nutshell, it seems that the empowerment agenda has been intensified throughout twenty-first century Europe. Personal fulfilment for children is a major point of reference in the wider policy debate, even as extant regulatory frameworks signal a strong commitment of advanced welfare states to avoiding any harm to their offspring once it becomes salient.

At the same time, however, the four country sections contain observations that suggest that current child protection systems are fraught with various challenges and inconsistencies. Hence the aforementioned general commitment is not in perfect harmony with the regulatory frameworks in force. Extant devices have important limitations. First, the very infrastructure of child welfare services appears deficient in many places. Capacities are unequally distributed across local settings, with ‘substantial variations in policy or practice between local authorities operating in the same jurisdiction’ (Bywaters et al. 2020: 211, referring to nations of the UK). In some respects, the much-discussed social bias in children’s ‘chances of a safe, supportive and stimulating childhood’ in part emanates from ‘inequitable service responses’ to encountered needs (ibid: 212). Apparently, twenty-first century welfare states do not resource family and welfare services in ways that enable them (all) to cope with growing or more complex caseloads, thus belying the ‘universalist’ promise inherent in established regulatory frameworks. More generally, it seems that the child protection systems under consideration cannot keep pace with both rising public expectations and novel challenges, such as more frequent disruptions in family life.

Secondly, the public treatment of ‘troubled’ family lives reflects a strong social gradient. Important distinctions are made between different categories of users of whom some have become subject to increased administrative control, notwithstanding the general reluctance of Western welfare states to monitor the private behaviour of ordinary citizens. Internationally, child protection has become more intrusive for some categories of families, with this materialising (among other things) in a rise of official notifications. Lower-class parents are easily suspected of being incapable of child rearing, as indicated by the increase in safety checking

and reporting procedures. While this seems to be most prominent in Anglo-Saxon contexts, the country sections above suggest that, as a tendency, the extension of the control agenda is an international pattern. This is prone to delimit the space for personal self-direction and coincides with a widespread indifference to the fact that other problems (poverty; social discrimination) may actually have a greater impact upon the educational capacities of parents (Featherstone 2019; Parton 2020). Arguably, increased public oversight is not necessarily indicative of more effective approaches to empowering children or their guardians. Rather, with public pressures to 'save' children 'from their parents' (Kedall 2018: 100), caseworkers are motivated to remove endangered children from their families at a very early stage. Concomitantly, the new millennium has seen the spread of novel tools 'to identify the "high risk" or "dangerous families" and differentiate them from the rest' (Parton 2017: 8), for instance by predictive risk modelling. Users categorised as at-risk groups are viewed 'as requiring more extensive inputs ... in the form of therapeutic and legal interventions', with public authorities expected to concentrate their efforts on this particular target group (Kedall 2018: 94). In this vein, the forensic dimension of social intervention becomes more prominent and feeds into dynamics of personal blame, with every harm chargeable to an individual's account (Parton 2017, referring to Douglas 1992). At the same time, 'light' family welfare services have become less substantial in many places. This, in turn, implies a narrowed understanding of the genuinely collective responsibility for the well-being of children.

Thirdly, family welfare policies have developed under the influence of changing approaches to running human services in administrative terms. It is true that, in the child protection field, programmes inspired by the mantra of 'New Public Management', as well as related neo-bureaucratic concepts (see Part I of this book), seek to make public intervention water-tight. At organisation level, this mantra translates into 'managerialist' forms of governance, meaning a blend of business-like steering tools and faith put into direct or indirect top-down control (for more details, see Subchapter 17.2). Agents and services are pressurised to deliver clear results, and it seems that the more a given society is convinced that public policies should (and can) impede harm to children and improve a youngster's well-being, 'the more welfare agencies ... are required to account for their actions when situations ... go wrong' (Parton 2017: 5). However, this approach to managing child protection systems has repercussions that may eventually undermine the objective of extending the scope of child protection services (Bode and Turba 2020). Thus, several reforms launched within European child protection systems have made single agencies and their caseworkers accountable for (alleged) failures or cost-intensive practices – although they mostly lack full control over the trajectory of a given at-risk family or child. In doing so, these reforms encourage conformity with bureaucratic prescriptions rather than ambitions to fully engage with all the intricacies of a given child protection case. The services' attention moves 'from trying to make the *right* decision to making a *defensible* decision' (Parton 2017: 6). Such organisational behaviour has institutional causes, given the increasingly 'formalistic procedures' and inflated reporting obligations, all prone 'to streamline practices' while driven by the intention to 'make them more measurable' (Buckley 2017: 83–4, for the case of Ireland). A related cross-national trend consists of squeezing different agencies (e.g., family welfare departments, educational institutions, healthcare organisations, etc.) into 'enforced' partnerships expected to engage with joined-up working and systematic information sharing (Breimo et al. 2017). While inter-agency collaboration is indispensable for effective child protection, formalised obligations have been found

to absorb much energy in a sector that is short of human resources, especially when it comes to activities detached from a concrete child protection case. Moreover, the competitive spirit pervading this welfare sector here and there is prone to undermine collaborative effort. All this results in a widespread 'disquiet about child protection systems' (Buckley 2017: 79) and has deep repercussions on those organisations entrusted with interventions at the street level. These dynamics will be illustrated in greater detail in Part IV of this monograph.

## 8. The life stage of gainful employment: decent work and work-related self-determination

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This chapter examines the evolving nature of regulatory frameworks related to the access to both gainful work and employment protection broadly speaking. It does so by drawing on the concept of decent work and the idea of (work-related) self-determination, both essential issues in a study dealing with the fate of social modernity. The analysis commences by elaborating on the above notions and how they are used in the relevant scholarship. It then embarks on a detailed investigation of regulatory norms, which can help citizens access or maintain a decent job, or unemployment-related social protection. A particular focus lies on ambitions to develop or restore a person's employability when there is a risk of social marginalisation, most notably by active inclusion schemes. Again, the observations made at this stage will also inspire the analysis of organisational settings involved in such activities (see Part IV of this monograph).

In modern times, work has always been fundamental to both social life and personal well-being. Nowadays, having a job that provides social recognition and a related living income is vital for most contemporary working-age citizens in Western Europe. Furthermore, perceptions of individual well-being neatly correspond to both felt job security (Hipp 2016) and, for an increasing section of the working population, to the prospect of meaningful activities 'on the job' (Kahn 2018; Bailey and Madden 2020). As mentioned earlier in this book, labour market participation rates have grown almost everywhere in Europe, in part because women increasingly became involved in formal employment over the last decades. This holds notwithstanding that, across various countries, many females choose, or are forced into, part-time arrangements especially as young mothers (whereas such arrangements are less widespread among fathers).

To reiterate, 'modern' democratic capitalism took shape alongside a wide array of devices aimed at regulating formal employment, notably with the help of job (status) protection, unemployment and work leave compensation as well as support in the event of work incapacity (for instance because of health issues). Under certain circumstances, these devices can provide citizens with opportunities to make autonomous decisions concerning their working lives – whether in terms of time arrangements, type of occupation or workplace choice. From a *longue durée* perspective, the development of the respective regulatory frameworks has been impressive, especially up to the heyday of the industrial age in the last century. Nonetheless, the access to, and continuity of, decent work is anything but taken-for-granted. For a relevant part of the European population, some of the protective norms established during that time have lost ground (see e.g., Heyes 2019) – among which are those related to wage conditions, the stability of employment contracts and the access to vocational training (whether 'on the job' via apprenticeships or through gaining a university degree). As Chapter 5 of this book showed, current labour markets exhibit various situations of 'precariousness' (Kalleberg 2018;

Livanos and Papadopoulos 2019; Smith and Halpin 2019; Jara Tamayo and Tumino 2021), which have become a serious burden for many European citizens. This holds true even though, in the early 2020s, shortages in the availability of (better-skilled) workers have made it more difficult for employers to impose poor working conditions onto their staff in at least some industries and countries. Regardless of this, given the more volatile character of post-industrial employment trajectories, the regulation of labour remains a key issue when studying the fate of social modernity.

The very concept of decent work, widely known as an agenda of the International Labour Organisation, lends itself perfectly to engaging with the above issue. The concept has made its way into welfare state scholarship that is engaging with a growing transnational division of labour as well as with commitments to improve the quality of working conditions worldwide (Frey and MacNaughton 2016; Nizami and Prasad 2017; Pereira et al. 2019; Drubel and Mende 2022). The respective debate, while often focusing on non-Western countries, also extends to advanced welfare states where the concept has motivated academic work across various fields (Blustein et al. 2016; Gruber 2019; Dodd et al. 2019; Kupfer 2021), including the human service sector (Charlesworth and Malone 2017). In this vein, there have been ambitions to ‘benchmark’ opportunities for decent work internationally, although this is an undertaking fraught with the problems of accounting for cultural heterogeneity and difficulties in grasping complex working lives by rudimentary statistical operations.

A prominent tenet in the related academic debate is that gainful employment can be termed ‘decent’ once working conditions are safe and free of abuse, allow for rest and free time, exhibit a certain degree of job satisfaction and include income security in the event of work incapacity, as well as access to services that help to (re)establish a human being’s ability of exploiting his or her talents, notably concerning work skills and health issues (see Duffy et al. 2020). To be sure, the definition above rests upon relative terms. Working conditions stand and fall with what is feasible at a given stage of history or within a given economy. Moreover, concepts such as decent work have cultural connotations. They are often influenced by what a wider collectivity considers as being desirable for its members. Thus, in Western history, the abolition of indentured work and child labour – both of which became considered to be indecent at a certain historical moment – was a moral concern endorsed by hegemonic social forces, notwithstanding the economic reasons facilitating this choice, for instance, a growing need for skilled young people in an industrialising world (Rogan and Alfors 2019: 266ff). Similarly, job satisfaction is obviously contingent on what is considered decent in a given cultural context, for instance concerning the aspiration to ‘meaningful’ work, social security and personal influence in the work place. It may also correlate with opportunities for employees to preserve a work-life balance or to co-determine flexi-time arrangements (Nizami and Prasad 2017: 215ff; 229ff).

Notwithstanding the above qualifications, the idea of decent work chimes well with the modern vision of personal self-direction. It holds true that, in Western economies (and elsewhere), the prevailing mode of organising gainful employment often sits uneasily with this idea, given that a large proportion of human activities are performed under the control of a small number of capital owners. While hierarchy is endemic to any industrial or bureaucratic organisation of human labour, the systematic exclusion of employees from strategic decisions that affect their work place has remained a structural feature of these economies (Huws 2019). As, in this context, decision-makers in corporations are often driven by ambitions that run

counter to the interests of salaried workers, the above hierarchy tends to markedly reduce the scope for personal self-direction among the wider labour force. The structural imbalance in the employment relationship is also endemic to organisations in the public (or non-profit) sector, although the staff's influence on work processes in these organisations seems to be greater in many instances (Lahat and Ofek 2022). Irrespective of this, welfare states have created institutions that set limits to the heteronomy of waged labour. Among other things, they have spawned the norm of 'freely-chosen work' (Nizami and Prasad 2017: 14), which implies vested liberties to opt for a preferred occupation or career track. Legal acts provide most modern Europeans with some opportunities to influence the circumstances under which they become engaged with waged labour – for instance concerning the choice of work environment, job location autonomy and the possibility of self-employment. In twentieth century Western Europe, related arrangements have become enshrined in regulatory frameworks, which suggest related decisions as being a personal affair, at least from a juridical point of view.

Importantly, the actual discretion left to working age citizens in this realm is reliant on both available power resources and extant labour law provisions. Power resources often correspond with the achieved level of employability and with those opportunities that a given labour market offers in terms of salaried work or self-employment. Among other things, access to such opportunities depends on an employee's cultural capital, which may materialise, for instance, in a given level of education, in some form of class- or occupation-based self-confidence or in possibilities to exploit social networks. Furthermore, positions in the labour market are influenced by product requirements or work technologies, which have both changed markedly with the transition to post-industrial economies, featuring, among other things, a higher proportion of human service jobs and knowledge-based work. While this transition has opened up new zones of self-responsibility (Gallie 2019), post-industrial labour markets also contain a growing reservoir of occupations for which such zones are very modest.

Concerning those regulatory frameworks that Western welfare states have established in the area under consideration during the last 150 years, rules that reduce a worker's dependency on 'others' have become more rigorous overall, exerting a certain influence on what employers (can) offer in a given labour market with regard to working conditions. According to a much-debated conceptualisation, the invention and extension of such rules has entailed a (partial) 'decommodification' of human labour within the capitalistic economy (see Papadopoulos 2000). This notion, going back to Marx, was made popular by Esping-Andersen's seminal study on Western 'welfare regimes' (1990). It addresses different kinds of provisions through which human work in capitalism partially loses its character as a commodity that can be sold and purchased in the labour market. Such provisions may yield some job security, income replacement in the event of work incapacity or unemployment and (especially in the latter case) leeway in the choice of a new occupation (via unemployment benefits) and support to improve one's employability in line with personal talents and preferences (Pintelon 2012). During the twentieth century, the respective rules targeted waged labour while remaining widely irrelevant to independent workers. As most of the latter had larger amounts of capital at their disposal, decommodification was less of an issue here. However, self-employed workers lacking such capital – as well as the huge population of unwaged women – were not covered by related schemes, although some jurisdictions were progressively extending 'decommodifying' social protection frameworks to the non-waged population (e.g., by derived entitlements to healthcare provision or pensions).



Overall, most advanced welfare states have established specific combinations of salaried labour and employment-related social protection, with these arrangements retaining a great impact upon opportunities for decent work in the above sense. The scholarship dealing with these arrangements covers a wide array of topics. Much work addresses the core of labour-related regulatory frameworks and the latter's development over time (Clegg 2017; Duval et al. 2018; Agostini and Natali 2018; Rogan and Alfers 2019; Heyes 2019; Cronert 2021; Clasen and Clegg 2022). Within this core, the relevant frameworks contain two types of devices. One relates to employment protection and includes provisions on probationary periods, dismissal protection (such as notice periods, compensation payments, severance payments etc.), prescriptions for the use of fixed-term contracts, and norms specifying the conditions under which workers can appeal to an employment tribunal. The second type relates to income security in the event of unemployment or a temporal inability to work. Entitlements of this kind – often understood as ‘earned’ social rights – have attracted much attention in the academic community concerned with the comparison of welfare regimes. In related scholarly work, the focus often lies on the conditionality and generosity of unemployment compensation in different jurisdictions whereas rules concerning the making and unmaking of work contracts are not always included in such comparative assessments – although such ‘protective legislation’ (Olson 2019) is a critical component of the regulation of waged labour in modern capitalism.

The same holds for the periphery of the universe of employment protection and income replacement. An important zone in this periphery is occupational welfare (Natali et al. 2018), that is, non-legal provisions contained in collective agreements (at national, industry and company level) or individual work contracts. When considering binding norms susceptible to making salaried work (more) decent, such provisions may be crucial in countries that have exhibited strong systems of industrial relations throughout the twentieth century. In these jurisdictions, trade unions and employers have become involved not only in negotiated wage settlements but also in a bargaining over rules for dismissals, sickness leave or severance payments. Further arrangements in this universe include occupational retirement schemes and provisions that pertain to working time issues, occupational health and the voicing of labourers' concerns. In general, a high coverage by collective agreements (still) has a potential to foster job-related well-being and to make work (more) decent. At least, across contemporary Europe, bargaining coverage is associated positively with greater job security and longer job tenure (Berghlund and Furåker 2016). However, such coverage is often unequally distributed since it generally privileges workers higher up the social ladder (Riva and Rizza 2021). Even in the golden age of post-war welfare states, the role of social entitlements within individual firms or at industry level varied greatly – not only among, but also within European societies. Discrepancies are less pronounced in the Nordic hemisphere but can be substantial elsewhere. Thus, in continental welfare regimes, as in the German case, occupational welfare proves to be quite patchy – notwithstanding a relatively well-developed system of industrial relations in this country. Concerning redundancy payments, for instance, extant agreements provide for ‘relatively generous but highly unequal levels of benefits’ (Ozkan 2020: 29). Other welfare regimes show similar inconsistencies. Anglo-Saxon countries exhibit a low coverage for occupational severance payments while other company benefits (pension provision in particular) reach out to greater sections of the working population. In Southern Europe as well (for

instance Italy), the gap is large between protective frameworks for workers in big companies and those hired by small firms, let alone those employed in the informal sector.

Against this backdrop, occupational welfare may certainly contribute to make work decent – yet it is selective and frayed in most parts of Europe. What is more, occupational provisions have lost ground in many places since the 1990s. Internationally, industrial relations systems have seen a creeping erosion, leaving aside some smaller welfare states in the Western and Nordic parts of Europe. One expression of this has been greater flexibilisation and more decentralisation in major areas of collective bargaining (Liukkonen 2019: 20). While affecting pay-related settlements in the first instance, this movement – sometimes framed as ‘neoliberalisation of industrial relations’ (Boumans 2022) – has often reduced the scope of occupational welfare, making relevant schemes more selective in terms of access and coverage. In many Western European countries, a shrinking proportion of workers is covered by collective agreements, due to a decline of industry-wide bargaining (Peters 2008; Bosch 2015; López-Andreu 2019; Schnabel 2020). Where the latter is maintained on a larger scale or statutory bargaining extensions make sectoral agreements binding for all employers throughout a given industry, business efficiency has become a major point of reference when the involved parties are crafting such agreements, with this contributing to a growing fragmentation of the labour force (Liukkonen 2019: 54). Given these sweeping megatrends, devices with a potential to make work (more) decent are ever less grounded in occupational welfare schemes – therefore, the remainder of this chapter will sidestep them unless they appear outstanding in terms of coverage and generosity.

Concerning the periphery of employment-related welfare provision in Western Europe, a second set of devices has gained traction when it comes to the regulation of labour markets, namely, the universe of (organised) work (re-)integration. This universe comprises quite disparate regulatory frameworks and has long been neglected in scholarship dealing with welfare state development, at least prior to studies concerned with what became termed ‘active labour market policies’ across Western Europe (see e.g., Heidenreich and Rice 2016). In essence, the notions of work (re-)integration can be considered as an umbrella term for activities addressing citizens who are found to face problems in (re-)accessing gainful employment (mostly salaried work). The (official) purpose of these activities consists of enabling these citizens to participate (again) in the ‘normal’ labour market – potentially by filling positions with the previously mentioned attributes of decent work. A case in point is rehabilitative services attached to the healthcare sector – also labelled intermediate, post-acute care or post-discharge intervention – which are a good indicator of the degree of universality contained in modern welfare states (Harsløf et al. 2019a). Moreover, active inclusion schemes have become an important vehicle of work (re-)integration throughout Western Europe (Scalise 2020). For this distinctive (sub) field, Subchapter 8.2 will flesh out the character and development of relevant regulatory frameworks at greater length and, again, focus on the four different jurisdictions considered earlier. Prior to this, the analysis illuminates general developments in the regulation of gainful work as far as these are relevant to opportunities for maintaining, finding or re-entering decent work during the life course under democratic capitalism.

## 8.1 SOCIAL MODERNISATION THROUGH EMPLOYMENT PROTECTION AND WORK PROMOTION SCHEMES

Within Western societies, the scope for self-determination in working life largely depends on the existence of regulatory norms which ensure that ‘vendors’ of human capital on the labour market are not at the mercy of those who own or control workplaces. Job security and entitlements conducive to (partial) economic independence from market pressures in the event of unemployment form the backbone of those ‘decommodifying’ regulatory frameworks which have taken shape in these societies from the early twentieth century onwards. To some extent, related devices were designed under the influence of Enlightenment ideas; in some aspects, they also chime with the vision of social modernity. That said, the ‘golden age’ regarding these frameworks dates back to the decades following World War II. During that period in particular, legal provisions, or collective agreements agreed in industrial relation systems, vested numerous salaried workers with new power resources in their encounter with employers who became obliged to include protective provisions in labour contracts and accepted various pieces of legislation with a ‘decommodifying’ character. The regulation of labour markets in Western Europe came to comprise different – more or less interrelated – elements which combine to form employment protection frameworks (see Ozkan 2019).

One of these frameworks’ basic components is employment regulation, with dismissal rules playing a critical role. In the international literature, it is frequently observed that there is no pan-European pattern concerning these rules. Some advanced welfare states even lack comprehensive legislation in this area. In Nordic countries, dismissal protection as such is relatively modest for the bulk of the working population (Bredgaard and Madsen 2018, discussing the case of Denmark), in contrast to corporatist welfare regimes and Southern European jurisdictions, where related provisions have long been much more comprehensive. However, functional equivalents matter. Thus, collective agreements have often come to contain strong protective norms, such as long notice periods conditional on job seniority (with Denmark being a case in point). Elsewhere, severance payments and monetary compensation by employers under an ‘unfair dismissal’ scheme work as a decommodifying mechanism. The same applies to rules which delimit the use of temporary and fixed-term work, for example, by setting precise conditions under which precarious contracts are admissible. In some countries (e.g., France), regulators have obliged employers who hire temporary workers to top-up their salaries (Eichhorst et al. 2017: 7–9). A much-used grid to assess the character of related provisions is the ‘Employment Protection Legislation Index’ crafted by the OECD (see Myant and Brandhuber 2016 and Harcourt et al. 2021, providing a rough presentation and critical analysis of this index). This index roughly reflects how, and to what extent, a given welfare regime protects jobs subsequent to recruitment. One important factor is the strictness of legal rules that define prerequisites for individual and collective dismissals. The index hints at extant prohibitive regulation concerning the use of temporary work (scope for personnel leasing agencies, procedures concerning the hiring of fixed-term workers). In addition, it displays provisions relevant to working time arrangements and extra hours. In the wider literature, some aspects contained in that instrument are blamed for being arbitrary as they do not reflect possibilities to enforce extant regulation and show little sensitivity to regulatory differentiation within a given national framework (e.g., concerning variables such as company size and provisions in collective agreements). That said, the index is often viewed as a good ‘proxy of the amount

of labour market regulation' (Barbieri and Cutuli 2016: 503), in addition to highlighting trends in labour law. It provides robust evidence on employment regulation being well-established across Western Europe, notwithstanding the fact that the level of protection may be low for some sections of the labour force (e.g., precarious workers). Established regulatory frameworks impose costs on employers when making permanent workers redundant (European Commission 2017). Concerning the related expenses for firms dismissing staff, differences between Western European countries rarely exceed 20 percentage points, with exceptions like the UK, where such costs are very low, and Portugal and the Netherlands where they have long been exceptionally high. Concerning rules applicable for temporary staff, gaps seem to be larger, but many jurisdictions have expenses for employers that are not much lower than those due for permanent workers (with The Netherlands, Sweden and Germany being major outliers). Against this backdrop, it seems that twentieth century democratic capitalism has created effective devices to shelter salaried workers from market forces to some extent. True, most countries in Western Europe have seen a period of strong labour market deregulation from the 1980s onwards, and there are cases in which this trend has continued up to the early 2020s (see below). However, in some jurisdictions, this movement has come to a halt during the 2010s; others have even seen a countermovement – for instance in Spain, with a reform curtailing options for employees to use temporary contracts. In various respects, moreover, Western Europe has seen a tendency towards equal treatment of part-time, fixed-term and permanent work in terms of employment regulation (Dingeldey and Gerlitz 2022: 253).

A second set of devices susceptible to making a worker's life (more) decent are provisions that ensure (some) income security or replacement for those who are prevented from participating in the labour market, primarily during a period of job searching or inability to work. This ingredient of modern employment protection frameworks contributes to the decommodification of human labour in that it provides beneficiaries with leeway in making job-related decisions. Under certain circumstances, it also reduces the risk of social descent and the ensuing discomfort, as it may enable jobseekers to choose employment conditions similar to those offered by previous employers. All employment protection systems in Europe comprise schemes that partially decouple the flow of income from performed work – even though the nature of these schemes varies between national jurisdictions. To begin with, most employees in Western Europe have become entitled to sick pay once there is a health issue which prevents them from working (Spasova et al. 2016). The duration of payment – and the length of time during which staff members can be on sick leave without consequences for their employment contract – are aligned in most jurisdictions. The continuation of payment during an absence from work is incumbent upon employers for a certain period. Concerning the length of this period, provisions differ markedly between jurisdictions. A distinction between sick pay and sick benefits compensating income loss is common, given that allowances are granted by both employers and social insurance schemes (the latter often step in when a longer-lasting absence from work occurs). Notably, such entitlements are often complemented by health-related social rights, notably special allowances in the event of a longer-term illness. To deal with this latter situation, collective agreements in the realm of industrial relations comprise certain protective arrangements, and in some countries, these agreements prove to be the central source of regulation (e.g., in The Netherlands, Denmark or Finland). As for the duration of mandatory payments by employers, the latter do not exceed a couple of weeks in most cases, yet extend to several months in some jurisdictions (like in The Netherlands). Elsewhere, waged staff

can count on ‘voluntary’ sick pay from their employers, although some categories of (e.g., high-turnover staff) remain uncovered. Importantly, eligibility criteria and benefit levels vary across industries, as do payment arrangements. Social insurance schemes often step in upon the expiry of employer benefits, albeit in some places only for a short period, as in Britain (elsewhere, for instance in France and Portugal, payments last much longer). Benefits vary between a full and a half salary, depending on the country and length of absence. In the UK, there are only flat-rate payments, in Germany allowances amount to 100 per cent of the salary over several weeks. As for the self-employed, protection is poor in general, yet some European countries do enforce mandatory insurance (e.g., Belgium, France and Sweden). The same applies to citizens involved in ‘reproductive’ (domestic, care) work who remain uncovered in many cases – in a few jurisdictions, however, they benefit from programmes providing support to adult carers including when they are sick. Finally, some countries have established rehabilitation benefits under return-to-work programmes – while in others, rehabilitative services and benefit schemes (e.g., partial invalidity pensions, work incapacity benefits, long-term sick pay) are more dissociated (see Spasova et al. 2016: 17–18; Mittag et al. 2018; Hack 2018; Bryson and Dale-Olsen 2019).

A further scheme providing income replacement is unemployment benefits. Established in most European welfare states during the twentieth century (Alber 1981), these benefits are geared towards providing jobless citizens with temporary monetary support. A widespread formula here is pay-as-you-go arrangements, based on a collective saving pot funded by payroll contributions. Such unemployment insurance schemes developed into a ‘central pillar of labour market policy in most Western European Countries’ (Clegg 2017: 266). Up to the 1980s, benefit conditionality was rather low, as there were no requirements to show evidence of job-search activities, nor were benefit claimants exposed to detailed contractual agreements when looking for a job. Frequently, beneficiaries had the right to select a new occupation that remained close to their qualification and former salaries. The scheme’s insurance-based character implied that payments depended on a given contribution record but did not presuppose a means test. To be sure, unemployment compensation has always been quite diverse across Europe (Alber 1981; Esser et al. 2013; Immervoll and Knotz 2018; Jara Tamayo and Tumino 2021). Thus, in the new millennium, some schemes provide earnings-related benefits, others flat-rate payments. Moreover, entitlements are contingent on various criteria, with considerable variety between national or even industry-wide schemes (see the grid devised by Alber 1981: 159). There are considerable international discrepancies concerning waiting and qualification periods, qualifying conditions, provisions for disqualification (e.g., in the event of workers resigning from a job), the mode of benefit calculation, wage replacement rates and the duration of payments. In addition, entitlements for citizens involved in atypical work vary markedly. A while ago, Gallie and Paugam (2000: 5) argued that, in the light of such plurality, modern Europe exhibited variegated ‘employment welfare regimes’, each associated with specific attributes; for example, rates were found to be quite low in South Europe or the UK and much higher in countries such as Germany, France and Belgium. Nonetheless, basic functions of contribution-based income replacement schemes have been maintained with the transition to the post-industrial configuration (Buendía et al. 2020). By the end of the 2010s, net wage replacement rates of insurance-based schemes in Europe levelled off at a value between 50 and 70 per cent of prior earnings, with benefits being paid for one or two years in most cases. Qualifying periods amounted to around 50 weeks in most jurisdictions. The coverage rate was

60–80 per cent of the salaried workforce – albeit with outliers such as Finland and Sweden where it approached 100 per cent. Income replacements ranged between 60 per cent and 90 per cent of previous salary (Jara Tamayo and Tumino 2021). While, over the last decades, the scheme’s generosity declined and payments became more conditional (see below), it is noteworthy that, during the financial market crisis and the Covid-19 pandemic, Western governments provided extra support to citizens exposed to the risk of sudden dismissals, for instance by short-time work arrangements or amended income replacement schemes (Lydon et al. 2019; Becker 2022). Some European nations extended these schemes for jobseekers with low employment records (Knotz 2018). Others saw a recalibration of earlier reforms – for instance in Denmark where governments relaxed job-search requirements as a condition for receiving benefits, or Germany where the duration of payments was extended for older jobseekers (further revisions followed, see below). To the extent that such schemes (roughly) preserve prior living standards and provide (some) opportunities for making autonomous decisions on the labour market, they can (still) be regarded as an expression of a secular movement of social modernisation.

In addition, besides sick pay and unemployment benefits, income replacement systems in Western Europe comprise programmes that offer monetary support to jobseekers and temporarily inactive citizens who are not, or are no longer, covered by the aforementioned pay-as-you-go schemes. Over the last decades, related policies have spawned a veritable third tier of income security provision, embracing programmes such as unemployment assistance and universal credit schemes. Meanwhile, such programmes are often subsumed under the notion of minimum income protection (Bahle et al. 2011; Noël 2019; Natili 2019). Their existence signals social modernisation insofar as all destitute citizens are immediately entitled to a welfare benefit once they accept certain preconditions (which may be crucial). In some European countries, such (means-tested) programmes have been newly established during recent decades to provide support to jobseekers not eligible for social insurance payments (e.g., in Italy, see below). Elsewhere, such schemes had existed for a longer time – including as an intermediary solution for jobless citizens holding longer employment records, with their benefits’ value exceeding the basic minimum income rate. In this case, benefits were calculated on previous earnings, albeit with an income replacement rate lower than that one offered by the unemployment insurance pillar (Alber 1981: 155; Esser et al. 2013: 12–14). Reforms passed during the last decades have often slashed or repealed these ‘intermediary’ schemes, aligning them with other basic income programmes or merging previous entitlements into a single type of social benefit (like Britain’s ‘Universal Credit’). Addressing jobseekers with no entitlements to unemployment insurance benefits, such non-contributory benefits interlace unemployment support with other entitlements (including child supplements and tax credits) to feed into a ‘social protection floor’. Related provisions differ widely across Europe, yet most jurisdictions currently offer such a floor to citizens falling below a pre-defined poverty line. This includes people who belong to a group frequently called the ‘working poor’, receiving ‘in-work benefits’ or ‘tax credits’ (that is, a publicly paid supplement to a very low salary). As, due to both rising poverty and the contraction of the unemployment insurance pillar from the 1970s onwards (Gallie and Paugam 2000; Natili 2019), the number of beneficiaries of minimum income schemes has been on the rise over the last decades, these schemes constitute an important safety net within the employment protection framework of contemporary European welfare states. While the net minimum income replacement rate – a proxy for

assessing the level of benefits relative to labour income – has shrunken overall (especially between 1990 and 2010, see Noël 2019; or Wang and van Vliet 2016, dealing with Britain), the relative stability of this third pillar in the new millennium suggests that Western Europe continues to espouse the idea of collective responsibility for the most disadvantaged.

Finally, social benefit schemes in contemporary Europe have often been combined with work-related public services as a further component of modern employment protection frameworks. An important element of this ‘service pillar’ is health-related rehabilitation, that is, a welfare sector which is (more or less) attached to the medical system and helps patients overcome an episode of severe impairment – for example, a work accident, severe diseases or mental trauma (Stucki et al. 2018; Harsløf et al. 2019a; Sabariego et al. 2022). Rehabilitation in itself represents ‘a highly modernistic idea, anchored in the social engineering visions of the European welfare states’ (Hanssen et al. 2003: 36). Embedded in a variegated ‘infrastructure of legal, medical, and social service resources’ (Meinert and Yuen 2014: 1), rehabilitation services may embrace various activities, ranging from classical healthcare to vocational training, with the aim of offering people with impairments, but still of working age, a new start adapted to their altered circumstances. As related support can contribute to ensure the ‘dignity of labour’ and related ‘social participation’ (Nazami and Prasad 2017: 9), it has a potential to make working lives more decent – and therefore reflects a further trend of social modernisation in the wide universe of organised welfare provision. It should be noted that, in large parts of the Western world, the notion of rehabilitation is attached to policies addressing chronically disabled citizens (for a classical perspective, see Safilios-Rothschild 1970). Following the establishment of ‘disability rights’ (see Aucante and Baudot 2018), the international agenda for the ‘social inclusion’ of everyone in major areas of ordinary life inspires much of the current debate dealing with the rehabilitative endeavour (see e.g., Shakespeare et al. 2018). This debate also includes the field of geriatric rehabilitation. With an eye on typical users and extant institutional frameworks, it nonetheless makes sense to distinguish between support given to chronically disabled citizens on the one hand, and efforts to bring temporally impaired individuals back to their level of functioning prior to an injury or a degraded health condition on the other hand. The two missions clearly overlap, yet contemporary welfare states continue to have special programmes for groups of citizens who suffer from chronic conditions (such as persistent impairment activity limitations, enduring restrictions after trauma, and congenital or acquired disabilities) and need permanent support. Support schemes for those who are, at least initially, not expected to resort to these special programmes are aimed at reintegrating temporarily damaged workers into gainful employment (Mittag et al. 2018 or Ferdosi 2020). Entitlements are often combined with income replacement such as sick pay or rehabilitation allowances (see above). While practical support under these programmes is partially anchored in the medical sector (Kiekens and Peers 2019), interventions frequently build on a polymorphic service package which justifies referring to them as being part of a distinctive rehabilitation system (Harsløf et al. 2019a). Social interventions, such as patient education and stress management, are sometimes included in the rehabilitation package, as are advice and counselling services geared towards enabling beneficiaries to return to work. In some places, services are based on multi-professional teams embracing nurses, physiotherapists, physicians, dietitians, psychologists, social workers and administrative assistants. Elsewhere, the system’s components are more loosely coupled (see Stratil et al. 2017 or Andreasson 2019) as many programmes and providers tend to specialise in distinctive conditions and

users, including those with mental health problems (Rössler and Drake 2017), suffering from cancer (Kersting Lie et al. 2019) or having been affected by sustained strokes (Rumrill et al. 2020). International differences in this universe have remained considerable when regarding, for instance, administrative issues, the service landscape and funding arrangements (involving social security schemes, authorities of national health services and private insurance bodies). That said, from the early twentieth century onwards, ‘the scope of rehabilitation practices’ has become ‘substantially extended’, with a more ‘holistic approach to rehabilitation’ spreading across all advanced welfare states (Hanssen and Tveit Sandvin 2003: 25; 27). Concomitantly, the growing importance of this sector is obvious when considering the availability, volumes, capacity and density of related services, despite unmet needs in many places (see Abreu et al. 2019, dealing with the case of cardiac rehabilitation).

A further building block of the ‘service pillar’ of employment protection frameworks is commonly subsumed under the umbrella terms of active labour market policy or activation programmes (Dinan 2019; Weishaupt et al. 2023). In essence, these programmes emanate from ‘employment-focused policies ... encouraging more people into work’ (Clasen and Clegg 2022: 193). Classical examples include wage subsidies to employers entrusted with conveying occupational experience or ‘work habits’ to special target groups and public funding for vocational (re)training measures. Part of these policies translate into what is often labelled active inclusion schemes, combining benefit payments with case management processes (e.g., by employment services) and ‘job integration’ measures. Counted per capita, the actual input from these schemes often exceeds the value of jobseeker allowance. Having grown in scope over the last decades, the underlying welfare programmes appear as an eminent feature of public policies tangential to questions of decent work in the post-industrial configuration (see Section 8.3 below, dealing with this universe in greater detail). In theory, they have a potential to support workers engaged with upskilling or developing their human capital, conceivably in line with personal preferences. This may, for instance, include support to improve the capacity of a benefit recipient to manage his or her budget in ways that increases its value and the quality of life more broadly (Heidenreich and Rice 2016; Marchal and van Mechelen 2017). From this vantage point, related programmes – while having a number of downsides – epitomise a process of social modernisation.

## 8.2 COUNTERMOVEMENTS: THE ROLE OF INSTITUTIONAL CHANGE IN MAKING WORK LESS DECENT

The observations thus far cannot hide the fact that the last decades have brought forth a strong countermovement to the long trend of making waged work more secure and decent. A major background for this was deregulatory reforms enacted from the 1980s onwards with the aim ‘to substantially increase labour market fluidity’ (Barbieri and Cutuli 2016: 502). These reforms entailed a ‘global shift away from the standard employment model’ (Huws 2019: 9) and a general movement towards what is often called the re-commodification of labour (Greer 2016; Dukelow 2021). Altered business strategies concerning the governance of salaried work combined with new legal frameworks to make gainful employment more market-driven. With shareholders seeking to shift capital quickly from one place to another, the use of salaried labour became more aligned to short-term business plans concentrating on wage costs. In many places, this was accompanied by corporate policies aimed at union busting and putting



pressures on governments to contain the power of labour organisations (Peters 2008; Heyes 2019).

The latter were also hit by the abandonment of protective employment regulation for the sake of reducing labour costs at the national level, that is, competitive internal devaluation (Rathgeb and Tassinari 2022). Over the last decades, many standards instigated up to the 1980s in Western Europe have eroded with the transition from high industrial capitalism to the post-industrial settlement (Heyes and Lewis 2014; Rogan and Alfery 2019: 265). One expression of this has been the pervasive ‘substitution of permanent jobs by temporary employment’ (Barbieri and Cutuli 2016: 503), facilitated, for instance, by looser legal prescriptions concerning the use of fixed-term contracts and labour leasing (concerning the criteria under which such contracts were deemed legal, their lengths and options for renewal). A similar effect was produced by measures extending trial periods, the simplified use of freelance work, the extension of frameworks for ‘petty jobs’ with limited social protection and reforms facilitating a just-in-time organisation of waged employment. Reforms have also modified overtime standards for part-time workers (which were lifted in some countries) and possibilities for employers to resort to part-time arrangements or work on demand schemes without a guaranteed minimal number of paid hours (see Koumenta and Willams 2019, for the case of ‘zero-hour contracts’ in Britain). In addition, they have reduced the protection against the dismissal of permanent workers and lowered firing costs, for instance by reducing the scope for reinstatement in the event of unfair firing or caps on back pay and severance benefits (most prominently in Southern Europe). Further levers have been the simplification of procedures for collective dismissals and incentives for workers to renounce on involving labour courts, with France being a case in point (Eichhorst and Marx 2019). Other countries have enacted softer reforms, addressing, for instance, firm-size thresholds for the application of dismissal protection and restrictions on the selection of employees to be laid off first (in Germany). All these movements are mirrored in the previously mentioned Employment Protection Index developed by the OECD, bearing witness to a general decrease of job protection up to the 2020s. This trend also hit industries involved in organised welfare provision, showing a tendency towards ‘more fragmented, individualised and informal employment relationships’ (in the terms of Charlesworth and Malone 2017: 284, for the case of home care; see also Betzelt and Bode 2022, dealing with active inclusion programmes). To be sure, there is a great deal of international variety concerning such regulatory change. In jurisdictions that traditionally exhibit low standards of public employment protection (like in the Anglo-Saxon and Nordic countries), reforms were less groundbreaking. In corporatist countries, deregulatory policies concentrated on enabling atypical work contracts, whereas Southern Europe has seen reforms facilitating both the use of atypical employment and collective dismissals. Yet on the whole, contemporary Western Europe is no longer a stronghold of the standard employment model established during the twentieth century. This holds despite some revisions during the late 2010s, for instance in Italy (concerning dismissal protection), Spain (reducing options for the use of temporary work) and Germany (applying stricter rules for the use of atypical contracts and subcontractor arrangements in selected industries). Moreover, at the beginning of the 2020s, the ‘market position’ of skilled staff seemed to improve in various industries, due to a shortage of human resources in parts of the European economy – which, for some groups of the working population, partially offset the effect of earlier reforms. However, ‘social standards devaluation’ (Agostini and Natali 2018: 29) has remained the dominant pattern, given the

hegemony of ‘supply side accounts of labour market performance’ (Clegg 2017: 270) and their outcomes internationally, including a growing share of low-pay employment and involuntary part-time work, as well as the rise of occupational health risks and restrictions in the access to promising vocational training programmes (Ferdosi 2020).

By the same token, the last decades have seen various cutbacks in the level of income security for people affected by unemployment or temporary work incapacity. Thus, concerning sick pay (and sickness benefits), available evidence suggests regressive tendencies in parts of Western Europe. As Spasova et al. (2016: 26) have noted, some countries saw a ‘considerable drop in the coverage and take-up of sickness benefits’ (with Sweden and the Netherlands being cases in point). The reasons are multifold, yet altered eligibility conditions and a reduced duration of benefit payments prove to be major driving forces, besides effects caused by transitions to other benefit schemes. As of the mid 2010s, countries like Sweden, Denmark and Britain recorded less beneficiaries than during the 1990s. Elsewhere (in Belgium, Germany and France), the number of recipients remained stable (or were slightly growing for some categories of workers). Notwithstanding greater public sensitivity to mental health problems – and despite an ageing workforce faced by increased health risks (amenable to rising absenteeism) – expenditure on sickness benefits per EU habitant plummeted during this period (Spasova et al. 2016: 23).

Similar tendencies have surfaced in the area of unemployment compensation. Again, there are important international differences in the related benefit system that roughly cluster along welfare regime lines (Clegg 2017; Cronert 2021). However, from the 1990s onwards, the international mantra was inspired by the ‘activation’ (or ‘welfare-to-work’) paradigm and rebaptised as ‘social investment’. Labour market policies under this mantra urge jobseekers to accept any employment available or, alternatively, to enter job promotion programmes and related measures which – while being orchestrated by public agencies – are often devolved to non-state service providers (Betzelt and Bothfeld 2011; Weishaupt et al. 2023). Reforms entailed a wide-reaching overhaul of welfare benefits schemes as depicted above, feeding into a ‘creeping convergence’ of the respective regulatory frameworks throughout Western Europe (Clegg 2017: 272; Scruggs et al. 2022). One major result was reduced social insurance coverage and a growing role of means-tested assistance schemes (Ferragina and Filetti 2022). Regarding unemployment benefits, this reshuffle included the tightening of waiting periods and qualifying conditions, cutbacks of the net replacement rates of these benefits, and reductions in the duration of income support under a pay-as-you go arrangement. In addition, recipients of insurance-based benefits had to cope with stricter rules concerning job location and workplace commuting. Hence, changes in the insurance pillar have led to an earlier transition of many jobseekers to means-tested income support schemes. All this has come with restrictions on personal autonomy for beneficiaries, materialising in an enhanced control of a claimant’s income and assets, tightened sanction rules in the event of non-compliance with job search obligations or appointment dates, and flat-rate payments calculated on the official poverty threshold (see Bothfeld and Rosenthal 2018, for the case of Germany).

A major result has been new boundaries between insurance-based unemployment compensation and what has been depicted above as a third pillar of social protection for (employable) jobseekers that is, namely, minimum income schemes. The latter have become a default programme for a rising number of Europeans without a job or in low-pay (part-time) employment, with benefits not being indexed to inflation in many places. This overall transformation has

occurred under different welfare state traditions and epitomises a more general movement towards the broadening and deepening of welfare conditionality (Watts and Fitzpatrick 2018) – even for these benefits. In most jurisdictions, basic income security nowadays comes with behavioural requirements (such as showing up for imposed appointments and job interviews), the monitoring of personal activities (job searches, training courses, habits such as professional appearance, see below), and benefit cuts in the event of missed obligations. Moreover, beneficiaries are forced to spend down personal assets (private property and accrued savings). Related pressures may extend to citizens on in-work benefits who are urged to find jobs or accept longer hours in order to replace these benefits by wages (Wright and Dwyer 2022). Such provisions place a strong emphasis on ‘individual responsibility’ in the event of unemployment or partial work incapacity and increase pressures towards accepting jobs or working conditions that otherwise would be rejected. In some places, related pressures have been endorsed by cutbacks in other welfare schemes, such as sickness or disability benefits (like in Denmark, see Bredgaard and Masen 2018: 9).

Finally, there have also been novel restrictions in the access to work-related public services. While welfare sectors in these fields have expanded in some respects (see above), the circumstances under which services are delivered have changed in ways that often impede the satisfaction of pressing needs. Thus, in the area of health-related rehabilitation, services are often perceived as being deficient in the new millennium. Although they have become more sophisticated in terms of types of support, the gap between expectations and service performance has grown in many places. Even in countries featuring a generous rehabilitation system, both residential services and out-patient support come with undesired breaks, waiting lists, misplaced mono-disciplinary practice and underutilisation. Norway is a case in point (see Breimo et al. 2016; Aadal et al. 2018; Harsløf et al. 2019b; Rydland et al. 2022). In Germany, the rehabilitative endeavour has remained fraught with ‘fragmented structures with many and often poorly connected actors’ (Mittag et al. 2018: 7) even as the traditional focus on a patient’s employability breeds incentives to neglect hard-to-cure cases and aged workers (Bode 2019b). Elsewhere, rehabilitation has ‘developed in an unplanned, piecemeal way, with no coherent organising principle’, as Wade (2021: 472) puts it for the case of the UK. In this country, policies have sought to downsize rehabilitation wards and to promote community care although many out-patient service facilities have been found to be short of resources (Azeez 2017). Here and in other parts of Western Europe, rehabilitation services have also suffered from the underfunding and managerialisation of the healthcare system more generally (see Bifulco and Neri 2022, commenting on Italy). As for publicly orchestrated services addressing unemployed citizens, regulatory changes have brought important restrictions as well. In many respects, the conditions under which employment services are provided have been tightened over the last decades in many European jurisdictions. For various target groups, reforms have strongly affected opportunities to find, or return to, decent work (for more details, see the country studies below). In general, many ‘activation’ measures urge beneficiaries to comply with the demand for inconvenient ‘post-industrial labour’ (see Chapter 4 of this book) and seek to enforce a certain kind of behaviour during a job-seeking process. Thereby, they tend to combine a reduction in a worker’s self-determination with entitlements and services of which only some improve a worker’s employability.

As with institutional change related to child empowerment, the reshuffle of employment protection frameworks is intermingled with movements of social change. Indeed, the

cross-national restructuring of labour markets and ensuing social divisions have often caused disruptions prior, or in parallel, to the welfare reforms depicted above. Overall, opportunities for decent work are in many ways contingent on structural change in the (capitalistic) organisation of the economic system. In this realm, a shift towards just-in-time production, the proliferation of shareholder value orientations and the globalisation of corporate transactions more generally all have entailed new global pressures on wider sections of the labour force during the last decades (Morgan 2016; van der Hoeven 2023). Such dynamics spark and align with new business strategies, most prominently a quest for flexibility in space and time, raising an employer's interest in volatile employment relationships (at least with some sections of the workforce). They also materialise in an extended use of petty jobs and fixed-term contracts. Transformations are also propelled by technological change (digitalisation, automation, home office work), even though it is highly questionable whether the latter necessarily impedes decent work conditions in the dimensions discussed above (safe work, free time, job satisfaction, income security, self-determination, see Mason 2021). Moreover, institutional developments related to the organisation of (gainful) employment intersect in complex ways with sociocultural transformations. This, for instance, pertains to the growing labour market participation of women, movements of immigration and the persistence of an unskilled lower-class workforce attracted by an expanding consumerist mass culture. That said, all these dynamics are strongly influenced by public policies that over the last decades have manifestly contributed to thwart human progress when the latter is measured in terms of decent work and employment protection.

### 8.3 A PERIPHERY ZONE BECOMING MORE CRUCIAL: EVOLVING DEVICES FOR ACTIVE INCLUSION

As noted earlier, modern welfare states contain programmes to ensure that distinctive categories of workers receive special support or 'treatment' in the event of (long-term) unemployment or inactivity for personal reasons. For this target group, employment protection frameworks in Western Europe have been endowed with special devices and a mission to enable processes of work (re-)integration. While having long been located at the periphery of labour regulation, programmes in this realm have become more crucial for welfare policy designs over the last decades, with public agencies and non-state service providers being major players (van Berkel et al. 2018; Dinan 2019; Broschinski and Assmann 2021). The following paragraphs flesh out the evolving institutional regulation in this universe for one important subfield, namely, active inclusion policies. The analysis starts by illuminating the wider context of this subfield, before embarking on more fine-grained reviews of recent trends therein, considering the same set of countries which have been studied for the case of child protection programmes in the preceding chapter. The notion of active inclusion has gained prominence within a discourse that proliferated in the European Union from the 2000s onwards (Scalise 2020), even though certain initiatives in line with this general approach predate this discourse. The latter builds on the idea of raising a jobseeker's employability by both appropriate labour administration frameworks and distinctive job promotion measures (Dinan 2019; Benda et al. 2020). Over the course of time, the 'workfare' agenda in the US or the 'activation' approach of Nordic countries has served as a model for (re-)designing policies in this subfield. EU programmes contributed to extending them to Mediterranean countries, mainly via the European Social Fund (which

provided financial resources to local initiatives in these countries). In comparative terms, national active inclusion schemes exhibit important particularities, concerning, for instance, the coercive character of the instruments in use, that is, the terms of welfare conditionality. The ‘hardcore’ version is epitomised in US welfare-to-work programmes which impose job training or public works for recipients of social assistance benefits, with the related activities understood as a personal duty whereby beneficiaries are held responsible for their personal living conditions (Wiseman 2001; Wilcoxson and Moore 2020). While European approaches have been ‘softer’ in many places and often oscillate ‘between protection and activation’ (Ahn and Kazepov 2022), the previously mentioned components of active inclusion schemes (enabling employment services and job promotion measures) have often been viewed as two sides of the same coin when it comes to welfare state efforts directed towards (future) workers and jobseekers (Jessop 2022). While this is certainly questionable from both a historical and analytical perspective, current institutional designs in this universe justify the use of the above umbrella term, given that related programmes, under certain circumstances, may make labour markets more inclusive.

Employment service frameworks constitute a key element of these programmes. Broadly speaking, employment services have a remit to match work demand and supply at a given territorial level, traditionally by job placements and related communicative endeavour (Lippoldt and Brodsky 2004). In parts of Western Europe, job centres form the nucleus of this realm; elsewhere, social assistance offices become involved as well. While their services certainly serve the interests of employers (those who seek to recruit staff), they have a potential to provide jobseekers with opportunities to improve their access to a (more) decent workplace. The involved agencies offer vocational guidance and information about extant options in a widely inscrutable labour market, which in theory facilitates self-determined choices concerning job locations and work environments, albeit within the confines of what is on offer in this market. In many countries, the ‘amalgamation of the employment and benefit administration functions’ (Cook 2008: 4) has made the above agencies a generic institutional broker in job arrangements, notwithstanding that – during recent decades – some of their tasks have been taken over by private firms (Greer et al. 2018a; Jantz et al. 2018).

In most European jurisdictions, the above frameworks also include special ‘job promotion measures’ to overcome barriers to (appropriate) gainful employment. For jobseekers, the receipt of unemployment benefits or social assistance is often linked with a participation in such measures (on a fixed-term basis). In their early days, job promotion programmes were often meant to develop, or further sustain, activities serving the public good (e.g., ‘public works’ in local communities), with salaries paid according to collective agreements for state employees in some places. This logic was also relevant to non-state initiatives that were run by non-profit organisations or social enterprises. These were geared towards providing jobseekers with new opportunities in a (more or less) ordinary work setting – such as a recycling clothing or housekeeping services (Nyssens 2006). Later on, this particular approach was widely abandoned and replaced by a new mantra, often referred to as welfare-to-work (Eleveld et al. 2020), also labelled ‘activation’, ‘workfare’, ‘work-for-benefit’ or ‘work-first’ orientation (McDonald and Marston 2005; van Berkel and van der Aa 2012; Lødemel and Moreira 2014; Considine and O’Sullivan 2015; Eichhorst et al. 2017; Pinto 2019). The idea consisted of moving jobseekers into any kind of regular employment as fast as possible – perhaps, when seen as necessary, after short-term training units or measures aimed at con-

veying occupational experience or ‘work habits’ to them. With this new mantra, the receipt of welfare benefits was often made conditional on engaging with the aforementioned activities (Knotz 2018) – although national frameworks differed concerning how this was enforced and which kind of support was on offer. The rationale behind this strategy was a ‘reinforcement of supply-side orthodoxies’ (Lindsay 2010: 124) in policy approaches to labour market regulation (Theodoropoulou 2018). These approaches, popular among mainstream policy and expert circles alike, were predicated on the conjecture that unemployment was primarily the result of individual deficits (or orientations) of jobseekers, including a ‘hysteresis’ effect caused by (sometimes intergenerationally transmitted) long-term worklessness.

The welfare-to work rationale constitutes a key element of contemporary active inclusion schemes. It undergirds support arrangements by which case managers sustain jobseekers in their attempts to find a (commonly agreed or imposed) in-work progression route. As Berkel et al. (2018: 5) observe, typical arrangements in this field ‘contain a certain level of disciplining and coercive elements’ while, at the same time, focusing ‘on the upgrading of skills, building human capital and providing other types of support in promoting labour-market participation’. In some countries, such arrangements place a stronger emphasis on a voluntary participation of jobseekers and long-term efforts to assist their wider social integration (Schulte et al. 2018; Blonk et al. 2020). Elsewhere, they follow a ‘work-first’ logic, which has even been further extended over time (see Wright and Dwyer 2022, for the case of England, and McGann 2023, dealing with Ireland). Notwithstanding these differences, current active inclusion schemes in Western Europe share some cross-national commonalities. Thus, they are orchestrated by employment services or publicly regulated welfare agencies and their case managers which employ a (more or less) pre-defined array of job integration tools (see Brown and Koettl 2015; Filges et al. 2018; Scalise 2020: 67–96; Cronert 2019, 2021; Weishaupt et al. 2023). These tools include, first of all, the co-sponsoring of waged salaries addressing employers willing to take disadvantaged workers on board, often in conjunction with mobility grants; on-the-job teaching; or other forms of personalised social support. Besides this more classical instrument, active inclusion programmes promote subsidised employment in what is traditionally named ‘sheltered workshops’ for chronically disabled people which, however, is an industry that underlies a separate institutional framework in many European welfare states (Beyer et al. 2010). Job promotion measures following a ‘welfare-to-work’ logic target a wider clientele, inviting, or assigning, beneficiaries to activities such as job search counselling, vocational training and measures aimed at conveying (new) occupational experience to jobseekers. The latter may comprise short spells of voluntary work or short-term missions in public or charitable organisations, as well as temporary employment in special projects run by public and non-state organisations, including work integration social enterprises (Dufour et al. 2022; see Chapter 13).

In what follows, the institutional architecture of the active inclusion endeavour (basically employment services and job promotion activities) will be examined for several jurisdictions, again with an eye on major trends over the last decades. Drawing on both the country studies and available comparative overviews, the analysis will focus, as explained earlier, on overriding commonalities despite different contexts.

#### a. Norway

From an international perspective, Norway has had an exceptionally low rate of unemployment over many decades. As a result, regulatory frameworks related to work (re-)inte-

gration address smaller segments of the population and concentrate on citizens with social handicaps and health-related problems including reduced work capacity. From a comparative perspective, this latter group is relatively large in Norway. Moreover, immigrants are a key target group, especially those with low educational attainment. In general, labour market regulation has long enforced homogeneous work conditions across the active population, keeping short term, seasonal and casual labour as well as low pay at modest levels. Norms concerning salaries (including minimum wages) and the use of non-standard forms of employment often emanate from multi-employer (sector-level) collective bargaining, covering the bulk of the working population, except holders of marginal part-time contracts or migrants using agencies to juggle shift-work arrangements. The options to resort to temporary work or fixed-term contracts, while having been extended over the last years, are still restricted (Evju and Holo 2000; Rasmussen et al. 2019; Sila and Hemmings 2020). Temporary work agencies were admitted only in 2000 while ‘non-justifiable’ short-term contracts became established in 2015. The ‘Working Environment Act’ encourages jobseekers to register themselves at temporary agencies (Kleppe and Støren-Váczy 2019). Active inclusion programmes have been instigated since the 1990s (Gubrium et al. 2014) as a response to both rising poverty and low activity rates among lone mothers and beneficiaries of work incapacity or disability benefits.

In this wider context, the role of employment services consists of processing a small number of ‘standard’ jobseekers with short spells of unemployment, on the one hand, and citizens with limited employability on the other (Røysum 2013; Gubrium et al. 2014; Dahl and Lorentzen 2017; Trætteberg and Grødem 2022). As regards the former group (of ex-employees), which falls under the National Insurance Act, the regulation in force ensures that these services check benefit entitlements (calculated from previous salaries) and inform claimants about job opportunities as well as available training schemes. Reforms in the early 2000s have increased inspection efforts vis-à-vis claimants, by restricting parameters for eligibility and imposing stricter behavioural requirements, although this had little impact on caseloads in employment agencies concerning this group of users. In theory, benefit claimants are obliged to take any paid job anywhere in the country (full time or part time) and to participate in proposed work-promoting measures. However, in the regulatory framework, mention is made of redeployment in suitable work; hence the employment services’ agents have some leeway here. Employable young benefit recipients can be obliged to embark on work-related activities; hence agents may sanction non-compliance with temporary benefit cuts.

An important group of jobseekers targeted by active inclusion policies consists of unemployed citizens claiming social assistance – such as labour market newcomers, lone mothers and non-working disabled people. This category falls under a special regime run by the municipalities under central state oversight. From the 1990s onwards, this regime has seen a ‘shift in emphasis from the traditional compact of an unconditional entitlement to state support in the form of a minimum income to a duty for participants to actively seek and accept work’ (Gubrium et al. 2014: 23). Social assistance benefits have not been curtailed, but the gap between these and average incomes has grown during the 2010s. Measures to ‘activate’ recipients by cutting or suspending benefits have always been ‘a matter of municipal discretion’ (ibid), yet in the past, some local authorities were found to apply a tough workfare regime (featuring imposed training programmes or activities

intended to provide work experience). More generally, from the late 2000s onwards, a greater emphasis came to be placed on the work-training aspect of activation (see below).

In 2005, employment services were reorganised into multipurpose one-stop shops at local level (Christensen et al. 2014; Minas 2014), entailing a ‘complete redesigning of the organisational landscape’ in the field of work (re-)integration (Dahl and Lorentzen 2017: 94). Agents administering insurance-related services – now overseen by a national (Labour and Welfare Administration) bureaucracy – were led to operate side-by-side with colleagues following instructions from municipal authorities. Regarding the administration of the insurance scheme, national performance objectives apply, even though sanctions seem rare where targets are not met. Those managing social assistance schemes are accountable to local authorities and are invited to follow governmental guidelines (e.g., mandatory ‘integration plans’ for new immigrants). The result is a unified network of local ‘NAV-offices’ responsible for a wide range of social benefits and services, based on highly professionalised staff with trained social workers as the largest profession (Sadeghi and Bringsrud Fakjaer 2019; Gjersøe et al. 2020). At the same time, some services that were traditionally provided by public organisations have de facto been taken over by commercial agencies operating in a market for mediating manpower via personal leasing (see Kleppe and Støren-Váczy 2019, dealing with the situation of immigrants).

Job promotion measures within active inclusion programmes in Norway have become more comprehensive over the last three decades (Aakvik and Dahl 2006; Spjelkavi 2012; Kane and Köhler-Ohlsen 2018; Hansen and Gubrium 2022). From the 1990s onwards, measures were partially modelled on the ‘work first’ approach developed in Anglo-Saxon jurisdictions. Special policies addressed citizens with physical, mental or social handicaps. Overlapping with rehabilitative intervention after illness, or in the event of impairment (see below), these policies have come to include placements in ‘labour market enterprises’ or ‘vocational rehabilitation companies’ that offer profiling, training competence evaluation and work experience. Their mission consists of making jobseekers (re-)access the ordinary labour market after programme participation. Local branches of the employment service have a remit for assessing needs and devising individual support plans that include, among other things, training schemes, subsidised employment or cognitive behavioural therapy (offered by ‘Centres for Work Coping’). A further component of the tool-set has been subsidies to work cooperatives who permanently employ workers with extended disabilities.

After 2010, the relevant institutional framework was modified in some respects. With political commitments to combat both poverty and exclusion from regular work careers due to long-term impairment, ‘active inclusion’ programmes championed individually tailored actions, follow-ups and diversified work promotion measures under a more holistic ‘human capital approach’ (Gubrium et al. 2014: 37). A flagship initiative was the so-called ‘qualification programme’, combining an allowance close to the level of unemployment insurance benefits with personal support plans agreed between case managers and programme participants. These plans contain an ‘institutionalised defined trajectory with certain expected steps: from course-taking to work-training to work-placements, and finally, to job-seeking’ (Hansen and Gubrium 2022: 1012). Concomitantly, governments fostered the external provision of welfare-to-work services, with various measures being



devolved to non-profit organisations (e.g., those specialising in drug rehabilitation, see Haugen 2018).

Available studies show a mixed picture concerning the direction of (institutional) change in this realm (Dahl and Lorentzen 2017; Marthinsen 2019; Hansen and Lorentzen 2019; Bakkeli 2022; Hansen and Gubrium 2022; Trætteberg and Grødem 2022). On the one hand, enhanced public efforts to address disadvantaged sections of the (working) population have provided some categories of jobseekers with new opportunities. Hence, as interventions go beyond mere job placement and speedy redeployments into extant employment opportunities, they appear to pay attention to private life circumstances and dynamics in personal development. On the other hand, such attempts were sometimes abandoned when programmes failed to demonstrate high success rates regarding labour market transitions. Moreover, it seems that the promise of individually tailored services has not been kept in many instances, as local programmes have suffered from capped budgets, limited administrative capacity and latent cream-skimming (that is, a focus on those users who are ‘easy-to-serve’ and place). More generally, some measures tend to steer citizens into temporary and less secure income sources. They also create pressures on social assistance recipients younger than 30 years to accept work-related activities suggested by their case manager – even though the respective legal prescriptions are vague and leave some leeway to staff. Since 1991, claimants on welfare had to accept work-related activities and, since 2018, municipalities have been obliged to impose such demands on this population, unless jobseekers face special impediments. As for the external provision of activation measures, providers face growing uncertainty due to political commitments to increase competition via the procurement system (e.g., in the governmental platform 2017, see Haugen 2018). All these developments hint to traces of ‘neoliberalisation’ in the recent history of active inclusion policies (Marthinsen 2019).

#### b. Germany

Germany’s labour market has seen ups and downs over the last decades. While unemployment decreased significantly during the 2010s, the agenda of work (re-)integration (and active inclusion) has remained on the public-policy agenda. Besides population ageing, major backgrounds for this include a constantly high number of long-term jobseekers, a strong influx of refugees from 2015 onwards, the rise of in-work poverty (growing faster than elsewhere in Europe) and the ‘normalisation’ of precarious employment (Brülle et al. 2019; Burda and Seele 2020). Temporary work and fixed-term contracts soared up until the early 2010s, facilitated by repeated amendments to labour law (Schmid 2019). Among other things, governments had created options for employers to hire workers on part-time, low-grade jobs offering low salaries (€520 per month in 2023) and modest social protection.

In the same vein, the living conditions of jobseekers have changed markedly since 2005, due to a groundbreaking labour market reform that curtailed entitlements to unemployment compensation after one year of joblessness (for workers aged less than 50 years) while tightening the conditionality of benefits (Clasen and Clegg 2012; Bothfeld and Rosenthal 2018). In particular, this reform annulled a special allowance named ‘unemployment assistance’. While being means-tested, this allowance had been calculated on previous earnings and paid in perpetuity upon the expiry of entitlements to unemployment insurance benefits. The reform merged this benefit with the (equally means-tested) social

assistance scheme, transforming it into a (less generous) flat-rate allowance (basic income security), paid conditionally upon the recipients' willingness to accept 'active inclusion' measures. This movement is emblematic of the German welfare state model espousing the international trend towards a 'welfare-to-work' approach and breaking with the tradition of occupation-oriented social protection and the principle of guaranteeing experienced workers an acquired socioeconomic status in the event of individual hardship.

In this context, employment services were transformed as well. The reshuffle shifted most jobseekers under one administrative umbrella, including those who had previously been in contact only with municipal social assistance offices. Like in Norway, one-stop-shops (called 'jobcentres') were set-up, the majority of which were overseen by the Federal Employment Agency, whereas about 100 offices remained under the control of municipalities (Fuentes et al. 2014; Jantz et al. 2018). This overhaul came with commitments to boost the jobcentre's administrative capacity and to restructure the encounter with long-term jobseekers who were henceforth referred to as customers. The tool-box used for this included the 'systematic profiling of inflowing unemployed for individual case management as well as a larger and better-trained staff responsible for placement services and employment promotion' (Schmid 2019: 316), with street-level agents expected to file personal contracts with benefit claimants. Later on, pilot programmes provided case managers with greater time allotments to deliver tailored support to long-term jobseekers (see below).

Altogether, the range of job promotion measures has grown over time. External service providers, including private firms, became entrusted with job profiling, training and placement – side by side with non-profit organisations which received subsidies for predominantly supporting long-term jobseekers. Throughout this area, the last decades have seen a movement 'from job creation and qualification schemes to activation strategies' (Holzschuh 2019). Active labour market policies date back to the 1970s but have subsequently changed in character. In the 1980s and 1990s, a large range of training programmes was offered by various non-state providers and co-funded by the unemployment insurance scheme. Moreover, the unemployment insurance scheme paid (fixed-term) wage subsidies to public and non-profit employers taking jobseekers on board. In many places, local authorities endorsed active inclusion measures which provided basic training, a liveable income and work experience to particularly disadvantaged citizens. One instrument in use consisted of subsidies to work integration enterprises, combining personal support with the production of goods and services addressing unmet (e.g., ecological) needs at community level (Bode et al. 2006; Aiken and Bode 2009). These initiatives co-existed with sheltered workshops for the chronically disabled under a different and longer entrenched regulatory framework (Welti 2019).

The 2000s and early 2010s brought a sea-change in political priorities. Longer-term programmes (vocational training, subsidised employment) remained on the menu, yet the number of participants in such programmes dropped sharply. With the aforementioned 'welfare-to-work' approach, the emphasis was shifted to instruments such as job search coaching, work-related (generic) skills training and (imposed) short stays in a firm or non-profit organisation, intended to convey work experience to long-term jobseekers, including basic skills and 'work habits' (Tisch and Wolf 2015). With the altered mantra, programmes became more restrictive as regional commissioning units of the Federal

Employment Service tended to fund job promotion and active inclusion activities only if the latter showed high success rates regarding labour market transition. Commissioning processes were organised as formal tenders, implying a detailed buyer-defined specification of job promotion activities and accountability norms featuring formal targets or simple input-output ratios (Rauch and Dornette 2010; Holzschuh 2019; Betzelt and Bode 2022).

Like in Norway, the overall trend appears bi-directional. Active inclusion programmes have become more diversified than in the past; some contain more support-intensive job promotion measures which have been found to improve the beneficiaries' overall situation. For instance, in the late 2000s, a scheme called 'Perspektive 50plus', encapsulated in local employment pacts, involved private firms which were subsidised when taking vulnerable workers on board. Targeting welfare benefit recipients aged 50 years and over, this scheme provided intensive job coaching, special training and, in a few cases, public sector sponsored employment (Boockmann and Brändle 2019). On an experimental basis, more intensive job promotion measures were also available for refugees, low-skilled young people and long-term jobseekers with multiple personal constraints, showing positive outcomes at least for some sections of this target population (James et al. 2020; Achatz et al. 2022; Freier and Senghaas 2022). The 2010s also saw some efforts towards creating publicly subsidised jobs at a regional level. Thus, in 2019, a 'national job promotion programme for social participation' was established, focusing on particularly disadvantaged long-term jobseekers who are offered work contracts in various industries (30 hours per week on a minimum wage), with personal coaches providing advice and tailor-made practical assistance. This has been understood as laying the ground for a 'social labour market' based on earmarked funding for tens of thousands of highly subsidised jobs, each lasting up to five years and aimed at achieving sustainable social inclusion (life first), rather than quick transitions to unsubsidised employment (Knuth 2022).

However, whereas the labour market policy framework's contribution to the reduction of unemployment in general has been controversial (Bradley and Kügler 2019; Hochmuth et al. 2021; Lietzmann and Hohmeyer 2022), the welfare-to-work agenda has undoubtedly brought forth new constraints for jobseekers in their relationship with employment services. Since 2005, recipients of the basic employment benefit can be forced into low-waged and part-time work, and 'jobcentres' can impose increased geographical job mobility and occupations below a previously achieved level of qualification. Case managers are entitled to sanction non-compliance with behavioural prescriptions. These are much tougher than prior to the reform, although an amendment in 2022 has reduced related pressures to some extent – essentially by leaving a higher amount of savings untouched when benefits are calculated and by offering claimants new options for entering into further training (instead of a rapid job placement). Overall, the 'traditional' rationale of protecting the occupational and socioeconomic achievements of jobseekers has been widely abandoned in Germany. Simultaneously, administrative prescriptions set limits to individually tailored support as they streamline the interaction between the jobcentres and benefit recipients, for instance via a schematic categorisation of 'clients' according to their assumed employability (Eversberg 2016). This approach also affects the promotional effects of the aforementioned, more intensive support schemes (Kerschbaumer and Boost 2021).

Moreover, in the years after the promulgation of the welfare-to-work reform, tighter 'requirements to attend training and accept individualised job-search help' espoused

a ‘decreased spending on supported employment and rehabilitation’ (Bengtsson et al. 2017: 377). This also affected chronically disabled citizens (Rauch and Dornette 2010). A widespread impression until the early 2020s was that the promotional elements of the ‘welfare-to-work’ reform were outweighed by enforcement measures (Holzschuh 2019), particularly where administrative prescriptions enticed case managers to initiate such measures only for getting ‘something done’ (due to the proliferation of a ‘management by objectives’ approach in their organisations). Simultaneously, federal employment services became ‘transaction organisers’ (Greer et al. 2019: 1875) purchasing job promotion measures from competing service providers on the basis on numeric outcomes (e.g., the number of rapid job placements). Henceforth, these service providers were pushed towards implementing complex accounting systems and streamlining their personal interaction with beneficiaries (Betzelt and Bode 2022). More generally, non-state organisations entrusted with commissioned active inclusion measures (further education, job training, subsidised and sheltered employment) became squeezed into quasi ‘business partnerships’ with the public employment service (Aiken and Bode 2009). Despite the aforementioned diversification of job promotion programmes more recently, the dominant approach underlying these partnerships has a potential to impede ‘patient’ interaction with participants and to hamper their wider social inclusion. Related action would consist of taking care of users faced with more severe ‘life problems’, developing a jobseeker’s potential for personal and vocational skills development and respecting his or her preferences to improve self-efficacy. Instead, mainstream programmes up to the late 2010s tended to elicit ‘creaming’ and ‘parking’ strategies on the side of labour market service providers – meaning that the latter invest efforts only in cases with a positive return on investment while leaving others unsupported. Providers became increasingly led by concerns to preserve (economic) room for manoeuvre – which could be achieved by taking participants on board even where this was inappropriate regarding their profile, or by prioritising the easy-to-serve when funding schemes rewarded rapid job placements (Greer et al. 2018b; Boockmann and Brändle 2019). In this way, active inclusion schemes can end up being less inclusive overall.

### c. England

By international standards, UK labour market regulation is widely known for being ‘liberal’ concerning employment protection and unemployment compensation – and therefore a thorny terrain when it comes to ensuring decent work for all (Dodd et al. 2019). The liberal model, encouraging flexible work and low-wage employment, is outstanding in keeping income replacement rates low while making jobseekers engage immediately with extant opportunities in the labour market, including extremely precarious positions like the so-called zero-hour contracts (work on demand) or solo self-employment (which has been seen a hike during the 2010s). That said, from the second half of the twentieth century onwards, Britain did establish an employment protection framework geared towards taming the repercussions of unemployment, which was also helped by active inclusion programmes.

Traditionally, classical unemployment compensation, though being based on payroll contributions to a ‘national insurance scheme’, has never sought to protect income positions that workers had previously achieved within the labour market. Jobseekers receive flat-rate payments for six months, labelled (for some time now) ‘new style and contribution-based jobseeker’s benefit’. Transfers are not means-tested and are optionally

complemented by hardship extra payments. Up to the 1990s, the ‘diversion of jobseekers to incapacity benefits’ (Lindsay 2010: 133) meant a comparatively high number of out-of-work people received a permanent, widely unconditional welfare allowance. Also, during a shorter episode, young jobseekers were entitled to special benefits (e.g., the ‘Education Maintenance Allowance’). Regulation began to change with the so-called jobseekers act taking effect in 1995, often viewed as a ‘watershed moment’ (Dwyer 2016: 43) in the development of work (re-)integration policies broadly speaking, with this reform making Britain a forerunner in the international movement towards the welfare-to-work approach (see above).

In contemporary England, jobseekers with impairments and health problems undergo ‘Work Capability Assessments’ prior to decisions about them being entitled to a special allowance. This is followed by assignments to two classes of claimants (those viewed as employable and those deemed too incapacitated for work). A majority of claimants are classed as employable and assigned to a unified means-tested benefit programme called ‘Universal Credit’. This programme, subject to a phased rollout from September 2023, embodies a ‘work-for-benefit’ logic based on individual contracts with jobseekers. Sanctions (suspension of social security payments up to 26 weeks) apply when claimants do not comply with their ‘duties’. Merging six means-tested benefits and tax credits, the credit provides a single monthly public allowance that varies depending on an individual’s earnings from paid work (with considerable earnings disregarded and a unified withdrawal rate). It can be complemented by passported means-tested benefits for housing and further additional circumstances (for children, disability, caring responsibilities). By international standards, benefits are quite low.

Relatedly, the institutional design of employment services has seen a comprehensive remake over the last decades (see Fuertes et al. 2014; Fletcher 2019). First of all, jobcentres have been urged to ‘transfer staff from “back office” benefit process to “front office” customer service roles’ and ‘release resources for job-brokering activities’ (Stafford et al. 2012: 497). Today, these agencies function as a single work-focused gateway with a remit to integrate vacancy matching, job search support and the administration of benefit payments for working-age people. This remit, based on annual performance targets, materialises in a standardised tool-box which case workers are obliged to draw on when interacting with users (e.g., templates for work-focused interviews, job coaching and individual agreements; back-to-work action plans; ‘looking for work diaries’). Over the last two or three decades, their clientele has expanded to include people claiming ‘inactive’ benefits (citizens who long had little contact with employment-related services), lone parents and impaired workers (most of the latter are allocated to ‘work related activity groups’ and are required to engage in employment-related activity). The prevailing approach has consisted of confining the role of jobcentres to the processing of benefits payments and initial employment assistance while leaving further activities to subcontracted independent sector providers (Stafford et al. 2012; Bamba 2019: 77; see below).

Irrespective of this, job promotion activities have remained relevant, with employment assistance developing into a multi-tiered, public–private ‘welfare to work industry’ (Finn 2011: 140). This industry delivers distinctive activation measures, all tightly interwoven with the basic benefit regime portrayed above (see Lindsay 2010; Carter and Whitworth 2015; Considine et al. 2018; Orton and Green 2019; Wright and Dwyer 2022). Public

expenditure flowing into this industry was boosted during the 2000s but then stalled over a longer period. Active inclusion measures peaked with the ‘New Deal’ schemes of the late 1990s, offering jobseekers a set of supported employment promotion measures (including voluntary work and training). Vocational skill development has always remained underdeveloped in England, despite some programmes led by human capital oriented approaches pursuing a more holistic approach towards in-work progression (Lindsay 2010: 127). During the last decades, welfare-to-work programmes embraced a ‘Young Person’s Guarantee’ directing people under 25 years towards short-term college or sector-specific training; ‘employment zones’ in which non-state organisations were enabled to take jobseekers on board for a while; a ‘Future Jobs Fund’ through which selected community benefit projects offered temporary minimum wage jobs in the public and voluntary sectors (replaced later on by the ‘Youth Contract’ scheme); and the so-called ‘Pathways to Work’ programme addressing citizens with poor health conditions (see below).

As of the 2010s, the institutional framework for active inclusion measures was reorganised under an umbrella labelled ‘Work Programme’, with an ‘almost exclusive provision of labour market services by private providers’ (McKnight 2016: 106). Applying to all sorts of out-of-work situations, the programme initially embraced various components (job clubs, basic skill training, work experience, etc.) but ceased taking new referrals in 2018. Measures were run under a ‘black box’ approach leaving providers with a ‘large degree of discretion in the mix of personalised sanction and support’ (Dwyer 2016: 46). According to a ‘prime contractor’ model, central government officials selected one or two (mostly commercial) service providers for a given ‘contract package area’ (Considine et al. 2018), drawing on a combination of selection criteria (including price and quality) and light touch minimum standards. There was differential pricing across administratively defined payment groups to ‘calibrate provider incentives across the whole range of claimants’ (Carter and Whitworth 2015: 292). Providers received longer term sustainment payments that were expected to incentivise work and training rather than short-term job placements. Serving a clientele randomly assigned by a Jobcentre (Plus) agency (after 9–12 weeks in receipt of benefit), providers could resort to in-house profiling to develop claimant streams and manage their own supply chains. They did so by devolving various employment promotion measures to various subcontractors offering training courses; opportunities for ‘community work experience’ (for people unemployed longer than two years); and ‘intensive activity programmes’ (with generic training in a boot-camp) or ‘mandatory work activities’ (lasting up to four weeks). The last two options were meant to help jobseekers ‘establish the discipline and habits of working life, such as attending on time regularly’ (Dwyer 2016: 46). In 2019, the scheme was replaced by a much smaller ‘Work and Health Programme’ delivered by a limited number of ‘prime’ providers operating under the payment-by-results scheme, with the bulk of employment support to unemployment benefits’ claimants being returned to the public employment service (Jobcentre Plus) and some contracted-out services reserved for specific target groups (Considine et al. 2020). In addition, there has been some experimentation with government-funded, non-mandatory schemes, with non-profit organisations offering more intensive support to (a limited number of) jobseekers with special impediments (Payne and Butler 2022).

Regarding overarching trends in the active inclusion universe, institutional change has been quite intensive. Various policies have sought to make employable working-age

citizens get in touch with employment services on a regular basis and engage with job promotion measures, some of which attempt ‘to incorporate a more holistic, human capital-oriented model of employability provision’ (Lindsay 2010: 128) and to deliver routes to in-work progression. Moreover, welfare-to-work providers have come to be rewarded for job integration outcomes, with this bearing witness to ambitions to match jobseekers with opportunities for gainful work. At the same time, however, policies have become ever more ‘workfarist’ over the last decades. Thus, contractors of the employment service operate with a tight resource base including investment in services to impaired citizens and work-for-benefit style of employment. In this vein, budget shifts have been found to penalise able-bodied jobseekers (see Koenig et al. 2019). Moreover, the financial crisis after 2008 left many programmes floundering, as jobcentres had to adjust to spending cuts. Furthermore, standard non-state providers of ‘welfare-to-work’ programmes have become compelled, or incentivised, to concentrate on lucrative ‘cases’ while neglecting the harder-to-serve. Price competition among providers has been found to encourage ‘creaming’ and ‘parking’ (Greer et al. 2018a and b; see above), with many providers ‘retreating to a relatively generic and basic offer’ (Carter and Whitworth 2015: 279) regardless of whether they were for-profit or not. Finally, the previously mentioned tool-box of the employment service has been ‘criticized for incentivizing claim rejection’, for being impersonal and overly standardised (including when it comes to testing work capability) and for ‘causing high rates of appeals’ (Bambra 2019: 77).

The active inclusion framework created in the new millennium features a tough ‘personalised conditionality regime’ (Finn 2011: 135) based on escalating financial penalties in the event of non-compliance with extant rules. This also applies to citizens in receipt of in-work benefits, who are pushed to seek better paid or more hours of employment. This regime, exhibiting a strong orientation towards low-wage entry-level jobs, has been blamed for causing marginal employment retention and low pay, no pay cycles – rather than yielding long-term effects in terms of social integration. Although ‘the intensity of welfare conditionality applied’ has varied across cases and regions (Dwyer 2016: 47), the regulation in force pushes employment services to prescribe activities and control a jobseeker’s behaviour, for instance by checking fortnightly evidence of job search and imposing ‘welfare-to-work’ measures of any kind. In the course of time, this logic has been extended to a broader range of benefit claimants, including mentally disabled people (Dwyer et al. 2020). Overall, given this ‘mixture of contractualism, managerialism and marketisation’ (Carter and Whitworth 2015: 277), active inclusion programmes in England seem to be imbued with authoritarian spirit and often fail to provide a sustainable work (re-)integration of its clientele (Jordan 2020: 39–50).

#### d. Italy

Within Western Europe, Italy has frequently been portrayed as ‘a welfare state for the established, and the constant exclusion of outsiders’ (Hajjighasemi 2019: 155). While this simple imaginary glosses over more complex social divisions in this country (see Ascoli and Pavolini 2015; Caterina 2019; Giuliani and Madama 2023), it does largely apply to the structure of the Italian labour market and related opportunities to find decent work. By tradition, this labour market is highly segmented, with greater sections (around one third) of the working-age population being involved in atypical employment or in the informal economy (Fontana et al. 2019). In a ‘two-speed Italy’ (ibid: 117), work-related wellbeing is

geographically skewed, yet even the more prosperous Northern regions are affected by the above segmentation. Many younger citizens struggle to find permanent positions, being condemned to low-wage, part-time, fixed-term or informal work arrangements over longer periods. This results in high poverty rates and ‘working poor’ trajectories that are both above the European average (Mussida and Parisi 2020). Employment regulation is often viewed as contributing to this overall situation, particularly after the turmoil of the financial market in 2008 and in the context of the sovereign debt crisis and related ‘European interventionism’ (Caterina 2019: 127), that is, austerity programmes recommended by the EU. Even during the 1990s and 2000s, however, regulatory frameworks encouraged the use of agency work and fixed-term contracts (including for ‘projects’ and ‘work on demand’), as well as blurred distinctions between salaried work and self-employment. There is no general minimum wage, and since the mid-2010s, labour law permits open-ended contracts with reduced employment protection. In addition, legal provisions stipulate that monetary compensation may replace any working contract’s reinstatement in the event of dismissals that a court has declared unlawful (Vesan and Pavolini 2018; Giuliani and Madama 2023).

The traditional approach to unemployment protection in the twentieth century relied on industry-based ‘redundancy and guarantee funds’, offering generous wage replacement rates, including provision for early retirement, albeit only to workers in companies employing more than 15 staff. These funds long served as a ‘functional substitute in the context of Italy’s anomalous system of unemployment benefits’ (Caterina 2019: 87). With the ambition to overcome the pivotal role of these funds, a novel benefit scheme named ‘national social insurance for employment’ was created in 2015. The scheme offered unemployment compensation to a much greater proportion of jobseekers – many of whom had hitherto been excluded from any entitlement – albeit at a lower level when compared with the industry arrangements sketched above. Under this scheme, payments are income-related (but capped) and (in theory) conditional on the acceptance of active inclusion measures (e.g., job training). The more generous industry-based arrangements have been maintained while workers in small firms have come to be sheltered by so-called ‘bilateral solidarity funds’ which offer employment compensation beyond the level of the aforementioned national insurance. Jobseekers not covered by any of these provisions may receive means-tested benefits (of a social assistance type), including those whose insurance-based unemployment benefits have expired. Furthermore, over the last decades, various municipalities have instigated local minimum income schemes, thereby filling (some) gaps in unemployment compensation (Natili 2019: 66–89; 131–74).

Between 2019 and 2023, moreover, Italian citizens were entitled to a citizenship income (‘*Reddito di Cittadinanza*’), which offered means-tested benefits to destitute citizens provided that they had lived at least ten years on the national territory (Giuliani 2021: 600f; Maitino et al. 2022; Bifulco and Mozzana 2023). These were quite high by international standards (€577 per month on average in 2021). The subsidy, received by 1.2 million people in 2023, was granted by the National Social Security Agency (INPS) and paid over a period of up to 18 months while being renewable after a suspension period. In theory, payments were conditional on contacting the employment service once a month, participating in available active inclusion measures (e.g., job training) and accepting an adequate job proposal (after the third one had been offered). Sanctions applied once claimants had rejected a ‘suitable employment’ or job promotion measures (Bianco 2017; Borzaga 2018),



yet it seems that this conditionality regime was interpreted in a liberal manner at the street level. The right-wing government who took office during 2022 decided to eradicate large parts of the scheme, replacing it by a much lower monthly subsidy (€350) confined to unemployed workers embarking on a job training programme. However, the concept has not disappeared from the public debate as the political opposition has shown strong commitment to reinstating this scheme should it return to power.

That said, since the abolishment of the state monopoly of job placement in the late 1990s, the infrastructure of employment services appears rather scattered in Italy. Reforms had entitled regional governments to outsource placement activities to for-profit providers (on a pay-for-performance or fee-for-service basis). In various regions, labour market policies henceforth relied on private firms which affected, for instance, the implementation of the so-called EU ‘Youth Guarantee’ that was largely based on internships orchestrated by subcontracted brokerage agencies (Pastore 2018). Nowadays, the employment service system consists of private job placement agencies, public jobcentres at province level and municipal initiatives concentrating on the most vulnerable out-of-work citizens (in local employment promotion units for labour orientation and counselling). Agencies operating under national oversight have never been the lynchpin of this multi-tiered system, despite attempts to extend their mission(s) to include an orchestration of job promotion programmes and the citizenship income mentioned above. The introduction of this latter element entailed additional state support to the jobcentres at provincial level, whereas a national umbrella should coordinate policies between territories and administrative tiers, basically by disseminating a standard service template featuring a profiling process, individual agreements and group-tailored deliverables.

Concerning job-promotion measures, the national umbrella has been expected to harmonise extant programmes, albeit with limited funding. The 2000s saw a political consensus around boosting the welfare state’s infrastructure for promoting employability and reducing youth unemployment (Bonoli and Emmenegger 2010). This was to be done, for instance, by tackling the transition from school to work and the high level of informal occupational activities (Maestripieri 2020). A prominent example was the aforementioned EU-sponsored ‘Youth Guarantee’ strategy and inherent apprenticeship schemes that mixed vocational training with classroom teaching (including ‘research apprenticeships’ and ‘industrial’ PhD programmes run in collaboration between firms and universities). Overall, the ‘welfare-to-work’ approach in Italy has taken shape incrementally and in fragmented ways. According to the regulation in force at the beginning of the 2020s, those claiming unemployment compensation were to sign personal agreements (the so-called ‘pacts for labour’) agreed with local ‘navigators’ (jobcentre case managers). A functional equivalent for the hard-to-place was a ‘pact for social inclusion’ managed by municipal agencies.

Over the last decades, various initiatives were developed at the regional and local level, albeit with modest resources by international comparison. Thus, from the early 2000s onwards, local authorities became engaged with activities geared towards combating poverty on their territory. Here and there they developed community work or special training programmes. In the wake of a far-reaching devolution of state responsibilities for social service provision to the local level, moreover, municipalities sought to provide disadvantaged citizens with employment-related services and active inclusion measures (Catalano et al. 2016; D’Emilione et al. 2021; Gasparre and Bassoli 2020). During the same period,

regions ran experiments with vouchers to jobseekers, inviting them to work with (mainly commercial) agencies for job placement and employability promotion (Pastore 2018). In addition, both national fiscal regulation and local procurement policies endorsed the employment of jobseekers facing special handicaps within ‘work integration social enterprises’, operating in the juridical form of a social cooperative and offering disadvantaged citizens work experience as well as vocational rehabilitation (Fioritti et al. 2016; Borzaga et al. 2018, see also Chapter 13). A national law stipulates that these organisations are entitled to fiscal relief when disadvantaged workers – those with health or life issues (including former prisoners or drug addicts) – make up for at least 30 per cent of their staff. In the same vein, local authorities are encouraged to contract out public services to these firms.

Regarding recent trends and the direction of institutional change in the above realm, the overall picture is mixed. In the new millennium, job promotion programmes, the temporary extension of minimum income schemes, as well as efforts to strengthen employment services and their user interface all indicate increased ambitions to develop new forms of work (re-)integration. However, as noted, the operational capacity of employment service agencies appears weak by international standards (Borzaga 2018; Vesan and Pavolini 2018). Moreover, as the aforementioned EU ‘Youth Guarantee’ programme illustrates most clearly (Maestripieri 2020), a good deal of labour market policies have become inspired by a ‘work first’ rationale, instead of pursuing more sustainable in-work progression routes. The design of programmes combining social work with ‘workfarist’ elements remains plagued by the short duration of the measures put in place (D’Emilione et al. 2019). Furthermore, private providers of employment services, cherished by public policies over a long time, tend to neglect hard-to-place users. Municipal agencies involved in active inclusion programmes have remained understaffed and often concentrate on a small section of very poor benefit claimants. In addition, notwithstanding their strong institutional protection, social cooperatives are exposed to economic risks in places where they compete with for-profit firms and local authorities, which may be attracted by bids from such firms when contracting out public services (see Chapter 13).

Problems have also appeared with the ‘active inclusion’ element contained in the (since abolished) citizenship income scheme (Bode and Moro 2021; Bifulco and Mozzana 2023). During the years when this programme was run, jobcentres were found to be overwhelmed by the challenges related to the implementation of the scheme. Yet even where conditionality requirements were applied to beneficiaries, the ‘official’ emphasis on quick job integration and pressures to embark on unpaid activities (for the common cause) were unlikely to help them find a decent job. The scheme also came with institutional incentives to take up risky forms of self-employment, contributing to the enduring labour market segmentation as described above. Moreover, the benefit was credited on an electronic card which beneficiaries were expected to use when spending the allowance; as some goods and services were excluded from the list of admissible purchases, there was no free choice concerning what to buy with the benefit. Under these conditions, out-of-work citizens looking for a new job were likely to bypass employment services and continued to rely on informal channels (such as word-of-mouth information, appeal to private social networks etc.) in the first instance. Hence, even with this (temporary) policy innovation, active inclusion programmes fell short of addressing many challenges endemic to the Italian labour market in more comprehensive ways.

Quintessentially, welfare provision related to work and employment in Europe has seen much change over the last decades, with this change heading in a similar direction in different countries. Thus, the curtailment of protective employment regulation mentioned above has been a phenomenon touching upon various welfare regimes. Concerning active inclusion schemes, it is true that their relative importance and development over time differs between European jurisdictions (see e.g., Cook 2008 or Scalise 2020: 101–28). In particular, the trend towards welfare-to-work, while international in kind, has come with distinctive rationales (Bode and Sandvin 2012; Dinan 2019). At the risk of oversimplification, one can observe that, since the turn of the century, the emphasis has been placed either upon measures combining upskilling with (more or less) decent income replacement, or upon arrangements that provide a revenue close to the poverty line, along with obligations to accept job promotion measures or rapid job placements.

At the same time, all countries under study here have seen ambitions to make service-based support more pervasive even as work (re-)integration programmes and active inclusion programmes more specifically have become a building block of their wider welfare state infrastructure. This connects with political initiatives to improve the matching efficiency of the regular labour market by interactive interventions via both systematic case management and job promotion measures. Far and wide, public employment services have been reorganised with the aim of making the encounter with jobseekers more systematic or comprehensive, for instance by more frequent appointments, intensified job search assistance (including jobseeker profiling and job application training), and extended monitoring of job search activities. In this vein, Europe has seen creeping institutional convergence through what Clasen and Clegg (2012: 136) have labelled an approach of ‘triple integration’, addressing entrenched divisions of labour between employment service functions and social protection, between income replacement and poverty relief and between schemes that had previously covered distinctive risk-groups in the working age population.

Overall, the novel tool-sets developed in the area of work (re-)integration since the 1980s have had ambivalent implications. In the past, public works and paid vocational training had been preferred options, driven by ambitions to both provide a longer-term perspective to jobseekers and a potential for endorsing human capital development. The new millennium then saw an international ‘marketisation of welfare-to-work’ (McGann 2023), with an emphasis placed upon the jobseekers’ employability, the rapid adaptation to the supply side of the labour market and pressures on service providers to deliver ‘value for money’ under these pre-conditions. While the active inclusion schemes created during the last decades may contribute to human capital (re)building here and there, they tend to force numerous workers into petty jobs and non-decent working conditions. Such schemes have often entailed revolving-door effects, with beneficiaries retained in a spiral of unemployment and precarious occupations. Moreover, management reforms geared to better coordinate job promotion instruments have bred greater administrative fragmentation, given that, in many parts of Europe, large swathes of service provision have become outsourced to non-state organisations, some of which are commercial firms. In many cases, these providers are motivated to pursue creaming and parking strategies in the sense explained above, either because they are profit-seeking or because the ‘output-for-money culture’ established in this sector urges them to concentrate on the ‘easy-to-serve’. Internationally, all this is prone to make employment protection frameworks less oriented towards ensuring decent work for all.

## 9. Safe later life: social security for retirement and support for frail elderly citizens

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During the twentieth century, and for the first time in human history, large sections of the European citizenry became included in collective arrangements which were supposed to provide a (at least modest) living income until death (Thane 2006). From a historical perspective, this was anything but a trivial shift in the social fabric of Western societies, and it took a long time before the bulk of the working population was considered to deserve an independent life after retirement. Fundamental to this was a growing life expectancy and the experience of problems with purely family-based welfare arrangements for elderly people. The encounter between a highly productivist economic culture and the shared experience of citizens becoming less productive in their later life was an additional driving force behind the invention of what can be referred to as institutionalised retirement. The latter was predicated on the assumption that the prevailing forms of gainful employment turn into a physical, mental and social burden when people are ageing (although some gerontologists tend to contest this). In this context, Western welfare states erected pension systems in which the contours were taking shape amid struggles about social rights and income redistribution within the wider society.

In twenty-first century Western Europe, the typical life course model implies (more than ever before) that older people will continue to live separately, and at a distance, from their children (if these exist). In contrast to former times, children are hardly considered as the central backbone for privately ensuring decent living conditions after retirement. Rather, contemporary Europeans expect their twilight years will be without gainful employment, based on the assumption that they ‘deserve’ pension provision after a long working life (for many, see Ebbinghaus and Naumann 2018). True, there has been a vibrant debate about the healthy years of life in old age which, for important sections of the population, may now extend to people in their late 70s (albeit, however, with a strong social gradient). The fact remains that human working capacity decreases at some point which, in the above sense, entails a need for special provisions. In most countries, the institutionalisation of retirement has long concentrated on the salaried (male) labour force. While the transition from work to retirement has become diluted for many citizens in recent times (Phillipson 2019), pension provision has remained a key institution of Western welfare states. Apparently, the majority of Europeans still stick to a life course model in which later life is catered for by regulatory frameworks under public oversight.

Among social scientists, such frameworks have often been seen to embody a ‘generational welfare contract’ (Birnbaum et al. 2017). These contracts ensure that wealth engendered by productive sections of the population is partially redistributed to non-productive groups, that is, children; retirees and also to those unable to work (Myles 1984). Thus, Western societies have forged arrangements whereby elderly people who materially depend on younger generations can nonetheless live independently in technical terms. In other words, the key devices

developed for retirement provision transform social dependence into material autonomy. Such dependence remains a matter of fact, as ‘pensions are by definition organised generationally’ (Berry 2021: 24). Economically speaking, the consumption of human-made commodities mostly takes place shortly after these products have been fabricated, hence elderly people (and children) are reliant on the economic activities of the productive generation(s) as a matter of principle. Modern welfare arrangements ensure by institutional means that outcomes of these activities are distributed across the entire life course (for a similar argument, see Barr 2001). Accordingly, problems in the economic machinery of a given society always have repercussions concerning the availability of resources to sustain the older population, regardless of how retirement provision is organised in technical terms. In particular, the pension wealth derived from capital investment in the form of annuity payments – that is, income drawn from a financial product which pension plan holders have purchased in order to convert savings into constant income flows after retirement – is not immune to succumbing to this iron law underlying the above welfare contract.

Related provisions are highly encultured and (can) change over time, notwithstanding that retirement provision remains a highly institutionalised realm, with the ‘devices’ created for this purpose exhibiting a collective and depersonalised character. In contexts where families are no longer expected to directly sustain the elder generation in material terms, support arrangements are an expression of abstractly conceived social bonds, regardless of whether this is explicitly acknowledged or not. Hence, modern societies organise pension schemes in ways similar to arrangements addressing their offspring – that is, by ‘borrowing from our later selves in early stages of ourselves’ (Birnbaum et al. 2017: 20). Importantly, this approach only works by a social contract spanning both time and individual life situations. To control the unpredictability of death, it enables (different forms of) risk-pooling based on generalised reciprocity and with provisions that make retirees keep up with younger generations concerning achieved living standards, that is, the amount and quality of consumed goods and services (this works, for instance, by pension indexation). From the late nineteenth century onwards, ever wider sections of the wage-dependent population and their families have been included in such arrangements throughout Western Europe.

In cultural terms, a shared concern for security has been a key vector for the spread of this overall agenda, even as the concept of social security has become a major reference point in modern welfare state policies. In the US, the term connotes public retirement protection more specifically and is even contained in the name of the institution created for this purpose. In essence, social security can be considered as a ‘value concept’ (Kaufmann 2012: 137), going beyond a mere economic rationale. Even fully fledged economists stress the cultural foundations of related welfare arrangements when arguing that it is ‘a question of social consensus what ... a society is willing to spend for their elderly to honour their contributions to economic development and progress during their working lives’ (Allianz 2020: 8). As a modern welfare state institution (in the sense of Adler et al. 1991: 1), the concept of social security, while being related to the entire life course, proves to be particularly relevant to the life stage during which biological risks become more salient. The very implementation of the concept, however, has social ramifications. Hence, when pensions are conceived of as ‘deferred wages’, retirement schemes tend to exclude unwaged people – whereas in countries in which the lion’s share of pension payments is derived from capital assets, the poorer sections of a given population incur the risk of receiving low incomes in later life because their access to profitable saving

plans is limited. Accordingly, the very devices used to respond to the collective concern for social security have implications in terms of structures of social inequality (Ebbinghaus and Möhring 2022).

The same issues hold for regulatory frameworks supporting care-dependent people, given that, as of the 1990s, ‘social protection for dependency’ (Pacolet et al. 2000) has become a major concern in Western Europe (Walker and Alber 1993; Roland et al. 2022). While this area of welfare provision overlaps with programmes for disabled citizens or rehabilitative services and may also address younger citizens, the ‘need for supportive care ... is closely tied to age’ (Fine 2020: 169). Growing old generally involves structural vulnerability and a partial loss of autonomy, or even degrading life conditions. Sooner or later, elderly people (unless they pass away early) move into a life stage subject to a process of ‘progressive surrogacy’ (High and Rowles 1995), with relatives and institutions required to settle things on behalf of them. Under conditions of the modern life course, coping with care needs on a mere individual basis may eat up a given retirement income and often overburden a care-dependent person.

The post-industrial solution to this imbroglio has consisted of collective arrangements which alleviate related hardship, namely, welfare programmes under the umbrella term of long-term care (LTC). In the new millennium, numerous Europeans have come to benefit from social rights in the event where restrictions in their daily living turn into a chronic condition. The respective arrangements form an integral part of the generational welfare contract, albeit in different forms (Lopes and Poškutė 2022). Importantly, while state intervention for long-term care has mushroomed internationally (Hall et al. 2019), there still is a gulf between retirement provision and collective support to care recipients – particularly when looking at the degree to which needs are addressed by welfare programmes. Indeed, across most parts of Western Europe, beliefs about how far the welfare state should respond to the care needs of the elderly – as well as expectations concerning who should provide such support and to which degree – continue to be diffuse (and varied).

In earlier stages of modern history, families (predominantly their female members) were expected to take action once relatives fell into a state of chronic (care-)dependency. In this event, private care-givers, often co-residing with spouses or parents, performed support activities of all kinds (even though professional medical treatment had become increasingly available). During the twentieth century, however, this pattern lost ground internationally, in part because a life within extended (tribal) families became increasingly uncommon. Instead, Western Europe witnessed a creeping individualisation of ageing and two initial responses to this trend (see Jack 1998). First, a growing number of frail elderly citizens moved into residential care homes which received a remit to ‘organise’ later life in a (semi-) total institution. Secondly, citizens could receive (modest) support from external sources when they stayed in their accustomed living environment. The emerging support arrangements remained patchy, featuring situations of co-production by private caregivers, community initiatives and the local welfare state. Volunteers involved in civil society organisations and parishes became important players in many places, stepping in when other kinds of support were insufficient or lacking. Formal services in this realm developed within a grey zone located between health-care, household chores and social work, even as the conceptual universe of domiciliary elderly care came to include various activities, including acts of bodily hygiene, nursing, housekeeping, advice in managing personal affairs and companionship.

In this diffuse context, the recent decades have seen a creeping trend towards the institutionalisation of LTC arrangements. Concerning the composition of inherent service packages, there has always been, and still is, huge variety in related policy approaches internationally (see e.g., Spasova and Vanhercke 2021). Importantly, the strength of familiarist orientations within a given nation-state or ethnic community make a tremendous difference in shaping filial social obligations and caregiving roles within private households or in the extended family (Pinquart et al. 2018). Irrespective of this, the advent and extension of public programmes devoted to elderly care is a cross-national phenomenon within Europe (see Pacolet et al. 2000; Anttonen and Sipilä 1996; Greve 2016; Lopes and Poškutė 2022), notwithstanding some regressive tendencies from the 2000s onwards (see Gianino et al. 2017 or Le Bihan et al. 2019; Rostgaard et al. 2022). A recent trend consists of including *personal care* into this welfare state agenda, that is, user-centred, non-familial support by professionals in domestic settings which goes beyond bodily care and medical treatment (Burau et al. 2007; Ranci and Pavolini 2013; Gori et al. 2016; Backhouse and Ruston 2022; Rostgaard et al. 2023). This development deserves particular attention as it signals a growing influence of the (modern) idea that people should live a self-directed life even under difficult personal conditions, namely in a state of physical or mental dependency. While arrangements of this kind had long been situated at the periphery of the welfare state, they slowly became acknowledged as a relevant element of publicly orchestrated LTC provision, at least in some parts of Western Europe. Section 9.3 contains an in-depth analysis of this very realm and its recent evolution, again on the basis of four country sections and combined with portrayals of the wider array of welfare arrangements relevant to frail elderly people. Prior to this, general trends in old-age provision are delineated with a focus on both social security schemes (broadly speaking) and the general architecture of LTC systems in Europe. Again, a guiding question is how far one can identify cross-national characteristics and developments within this area.

## 9.1 SOCIAL MODERNISATION INVOLVING CAREFREE, AND CARED-FOR, DEPENDENCY

In Western welfare states, the institutionalisation of ‘workless’ income in later life was often conceptualised as a ‘citizen’s wage’ (Myles 1984) honouring past efforts regardless of their precise nature. Concurrently, policies seeking to alleviate misery in old age have drawn on the value of human dignity (concerning this two-pronged moral foundation of modern retirement provision, see Bode 2008a). During the twentieth century, regulatory frameworks building on such orientations have come to offer numerous Europeans a prospect of carefree dependency – well in tune with the vision of social modernity as outlined in the first part of this book. Concerning this observation, some caveats must, however, be borne in mind (see Hinrichs 2021 and the observations spelled out further below). First, retirement arrangements were never given by nature. They emanated from social conflicts during which workers and their organisations struggled to have their twilight years free from material worries. Such conflicts persist up to the present time, as witnessed, for instance, by the quite vigorous protest movement against a pension reform enacted by the French government in the early 2020s. Secondly, as with other social protection schemes, pension entitlements came – and come – with conditions. In most Western European countries, public benefit schemes or social insurance plans make benefits conditional on minimum contribution periods (between 20 and 35 years,

depending on the country). Predominantly, the enrolment in state-controlled pension schemes was (and still is) predicated on the status of being wage-dependent (sometimes with earnings above a lower income threshold). Full pensions are granted only after a long working life, otherwise deductions are applied (this model persists up to present times). In the recent past, a good deal of contributors (particularly blue-collar workers) ceased working prior to the official retirement age, often due to poor health or long-term unemployment during the last years of their career. Early retirement schemes have helped to contain repercussions for pension entitlements, yet these schemes have been slashed or become less generous over the last three decades. Thirdly, in countries lacking decent (universal) basic pensions, retirement schemes tend(ed) to privilege males with extended episodes of salaried employment. Numerous women depend(ed) on their spouses' entitlements – with poverty risks arising from a family split-up (although derived pensions entitlements often did – and still do – lower these risks). Fourthly, in those pension systems with a prominent role of funded saving plans, retirement income was, and still is, contingent on available workplace arrangements and the economic sustainability of pension funds. Finally, as will be spelled out further below, pension reforms and changes in Europe's social fabric over the last decades have worsened the prospects of many Europeans concerning a later life in 'carefree dependency'.

Nonetheless, virtually all Western societies have seen the rise of collective pension plans during the twentieth century (Myles 1984; Anderson 2019a). These paved the way for a 'new identity for older people' and the institutionalisation of citizenship rights in later life (Estes et al. 2003: 11). Public (basic) pensions constituted a major building block here, together with non-state schemes under state regulation. In this context, retirement around the age of 65 became a widespread pattern. Internationally, it was based on 'pre-organised' arrangements of income replacement whereby large cohorts of (male) citizens (and their partners) were enabled to roughly maintain pre-retirement standards of living when leaving their jobs. Until recently, only a minor part of the European population remained active beyond the legal retirement age, notably independent workers with private pension arrangements (but also beneficiaries on a low retirement income). Beyond collectivising biological risks, twentieth century pension schemes adopted a (more or less) redistributive character in that they awarded social credits to caregivers, parents or students; introduced ceilings above which wage replacement was reduced or excluded; or offered minimum entitlements regardless of contribution periods. Thus, European pension systems came to compensate personal hardship or misfortune during the life course, at least to some extent. Accordingly, poverty rates among pensioners (regarding disposable income) declined up until the 2010s (van Vliet et al. 2020).

Given an increased life expectancy upon retirement (ranging between 17 and 20 years in 2020, for a person of 65 years), the prospect of a carefree silver age (in material terms) has remained realistic for many – despite important exceptions to this rule (see below). To be sure, pension systems (and their traditions) differ markedly across Europe (Anderson 2019b; Hinrichs 2021; Vlachantoni 2022). In most countries within mainland Europe, social insurance (social security) schemes still form a central pillar. These 'Bismarckian' schemes rest on payroll contributions (or tax money) raised from the working-age population to finance pension payments for current retirees (according to the so-called 'pay-as-you-go' principle), with pensions being determined by a formula emanating from political decisions rather than mere actuarial principles. This arrangement is decoupled from the performance of financial markets and contains scope for redistributive elements.



In some Western countries, pension entitlements for salaried workers are primarily anchored in company- or industry-funded retirement plans, some of which are employer-sponsored. Such occupational pension schemes tie in with the labour relationship, particularly in systems where worker's representatives (trade unions) are involved in their administration (Pavolini and Seeleib-Kaiser 2018). In various places, these schemes were long meant to top up public or social insurance benefits in order to guarantee comfortable living standards close to those achieved prior to retirement. In other cases, they have grown into a strong building block of national pension systems, with the public (state) pillar remaining small in scope (in contrast to Bismarckian systems). Plans in the occupational pillar are 'funded', meaning that contributions feed into capital investment expected to yield market profits, with financial assets kept in reserve to cover future liabilities (see Clark 2003 and Oreziak 2022). Where retirement provision relies on life insurance contracts or pension funds, entitlements are calculated on an actuarial basis and in accordance with individual contribution records, notwithstanding a certain level of risk-sharing among plan members and collective (partial) asset protection (through risk re-insurance). Importantly, traditional occupational schemes used to make pension payments align with previous salaries and length of working careers. Benefits were 'defined' in relation to prior earnings and frequently levelled out income volatility during a professional career. That said, conditions differed between companies and industries. In many places, coverage was less systematic than in social insurance-based systems (and this has hardly changed over the last decades). A few countries made occupational provision mandatory (e.g., Finland or France), at least indirectly, by extending collective agreements to all waged workers of a given industry (as in the Netherlands). Elsewhere, retirement provision by occupational plans remained fragmentary. For instance, less than 60 per cent of the UK workforce were covered by such plans during the 2010s (see Bridgen 2019a: 19). More recent plans crafted in the occupational pillar hardly offer pre-calculated pension payments (defined benefits); rather, the latter depend on the performance of investments in financial products and may thus suffer from poor market results.

Furthermore, Western pension systems have come to comprise a so-called third pillar, composed of personalised individual pension plans or functional equivalents (notably life insurance products). They resemble occupational schemes in important respects, most notably the 'defined contribution' principle (with fixed levies and unclear outcomes). For employees, contracting into such plans is mandatory in some countries (e.g., Sweden and Norway) while being voluntary elsewhere. During the post-war decades, this third pillar played a limited role overall, before becoming more important from the 1990s onwards. Publicly promoted by tax breaks or financial subsidies, individual plans are commercial products merchandised on competitive and opaque markets – which means that pay-offs are difficult to anticipate and may vary strongly between savings vehicles. While the latter look like a non-collective arrangement, they may nonetheless rely on a rudimentary risk-sharing rationale, with 'state action' having 'played an important role' in shaping regulatory models for such plans, for instance asset protection instruments (Anderson 2019b: 587).

Comparing European retirement systems in the new millennium, the role of funded pensions differs markedly from one system to the other. This is reflected by the huge discrepancy in the amount of private households' net financial assets in relation to national gross domestic product (see Allianz 2020: 20). That said, the three cornerstones of retirement provision co-exist in most systems. While a growing portion of retirement income emanates from capital

assets, early twenty-first century generations of pensioners still receive the bulk of their income from either traditional occupational plans or social insurance schemes (sometimes in combination with basic pensions). Concerning the former, the classic final salary (defined benefit) schemes can be deemed a functional equivalent of (pay-as-you go) social-insurance arrangements, at least when considering typical full-time workers (male; big industry) and leaving aside the issue of plan coverage. Despite strong regulatory change over the last decades – and its significant impact on the organisation of retirement (see below) – contemporary pension arrangements embody (various types of) intergenerational contracts which exhibit a (specific) model of organised risk sharing (at least concerning differences in longevity or in the prospect of ‘healthy years’) and reflect a common concern for social security (in the sense of Kaufmann 2012: 143). In some ways, the collective character of retirement provision (as depicted thus far) has been endorsed by recent pension reforms (Leisering and Mabbett 2011; Anderson 2019b; Vlachantoni 2022). Thus, concerning funded pillars, some countries have seen increased state regulation, which includes introducing publicly managed savings plans into the private pension market (Sweden; UK) or by prescribing an auto-enrolment in occupational schemes (implying a quasi-mandate for employers to cover all workers). Even in Anglo-Saxon systems, regulated forms of capitalised provision have been promoted (again) as ‘complements to public provision’ (Bridgen 2019: 28). In continental Europe (e.g., France or Germany), governments have committed themselves to preserving the central role of the social insurance model (although the latter’s generosity has decreased overall). From this angle, it seems that public responsibility for retirement provision has not been called into question internationally.

This also pertains to safety nets for citizens with low or no entitlements to the pension pillars portrayed thus far. During the twentieth century, most welfare states had established programmes to protect citizens on modest incomes during old age, albeit to varying degrees. Even recently, reforms have strengthened basic pension schemes (for instance, in the UK, in Germany and in France). After 1945, most European pension systems did not only compress social inequalities in old age (when compared with the situation of the working-age population) but also sought to delimit dynamics of social deprivation in later life. Poverty risks were an issue for distinctive sections of the older generation – for instance, women with shorter spells of gainful employment during their working lives or for those lacking a partner on a decent pension. In some countries, flat-rate basic benefits were paid to all retirees on a (national) citizenship basis. Elsewhere, retirement income was topped up with means-tested social assistance. Moreover, a few social insurance schemes ‘upgraded’ pension entitlements for recipients with poor contribution records. The result of all this was a ‘dramatic reduction in old-age poverty’ up to the 1990s (Anderson 2019b: 585) – although many lower-class pensioners had to live on rather meagre incomes, given the overall modest wage replacement rate granted by basic pension schemes (20 per cent in Denmark or in the UK, for instance, see Ebbinghaus et al. 2020).

Against this backdrop, for elderly people, carefree (economic) dependency became a common life pattern in twentieth century Western Europe. However, rapid social change made care needs an additional pressing concern during the final decades of the last century. The demand for practical support was growing due to an ageing population and the ensuing spread of disabilities and other social factors, such as changing household structures (Wittenberg 2016). As noted earlier, welfare state institutions have incrementally become involved in the

organisation of long-term care arrangements. Although unpaid, informal and private forms of caregiving have remained dominant in many European countries, public bodies have begun to develop special support schemes, using tax revenue or collective insurance schemes. This has paved the way for the promise of cared-for dependency becoming incorporated into the architecture of twenty-first century welfare states (Fischer et al. 2022). The literature on ‘care regimes’ (see Bettio et al. 2006; Theobald and Luppi 2018) often refers to this movement as defamilialisation and ‘commodification’ of care provision. While it is questionable whether elderly care had become a fully fledged ‘commodity’ by the end of the twentieth century, public policies partially shifted the care burden onto waged labour in the public and non-profit sector. In this vein, new occupations specialising in elder care work began to flourish, and many countries saw ‘the development of a qualified professional sector of care services’ (Le Bihan et al. 2019, 593) – notwithstanding important international differences in this realm.

A first step, taken quite early in the twentieth century, consisted of erecting residential care facilities, beyond those (high-end) rest homes which had hitherto hosted upper-class citizens in most cases. These facilities often served as a ‘last refuge’ for (more or less) destitute pensioners (see Jack 1998, and Johnson et al. 2010, for the case of Britain). Many of these homes never were places for living a carefree dependency (in the above sense). Rather, they resembled those asylums that American sociologist Goffman (1961) once labelled ‘total institutions’, due to characteristics such as a rigid organisation of daily activities, imposed obedience and limited privacy. Even in more recent times, residential settings for elderly people have frequently been pilloried in public as places neglecting their inhabitants’ needs (for many, see Ulsperger and Knottnerus 2008). That said, during the twentieth century, care homes became a default option for an increasing number of frail elderly citizens from different social class backgrounds. In wealthier world regions, this industry saw remarkable efforts of modernisation, as new concepts were geared towards creating a homelike atmosphere and organising leisure time activities, developing person-centred care concepts and ensuring enhanced space for privacy as well as user participation in the shaping of organisational processes (for many, see Koren 2010, dealing with the US). This modernisation movement has also materialised in public initiatives to oversee local practices in more systematic ways. Thus, since the 1990s, most (West) European care homes have undergone publicly orchestrated quality inspections (Mor et al. 2014). Moreover, many contemporary care homes offer options for assisted independent living and serviced housing (primarily for wealthier citizens), as well as more sophisticated services for special categories of frail elderly people (speciality care units, e.g., for dementia or palliative care settings). Hence, it seems that, despite its low popularity in most parts of Europe, approaches to residential care have become infused with some of the value concepts inherent in the vision of social modernity over the last decades. What has remained – or reappeared – in terms of neglect, isolation and poor service provision has become a matter of great concern throughout the wider public which appears to be ever more sensitive to human rights issues in later life (Meenan et al. 2016).

An important reference point in this context was the idea of ‘ageing in place’ (for many, see Milligan 2009), that is, organised support to frail elderly citizens within their community – often in a context of private caregiving. For a long time during the twentieth century, such home (or domiciliary) care was provided only in a piecemeal manner and in ways contingent on local circumstances, and also with respect to financial matters. However, state support rose from the 1990s onwards, with increased funding for home care facilities in many European

countries (Pacolet 2000; Ranci and Pavolini 2013; Barczyk and Kredler 2019). Even in Southern Europe – where formal care has always played a limited role – state provision began to supplement familial caregiving and charitable initiatives (Aguilar-Hendrickson 2020). Up to the mid-2000s, the defamilialisation of elderly care was a clear-cut trend across Western Europe (see Bihan et al. 2019: 581–2), with public policies creating new options and incentives for users to resort to professional support. The devices used for this purpose came to include funding for (in-house) domiciliary services, tax breaks to pay for extra outlays, vouchers or direct payments to help care recipients recruit domestic workers, and cash-for-care benefits to private caregivers. Further reforms were geared towards regulating, or even formalising, non-professional help, for instance by fostering respite care arrangements and training schemes – sometimes with the intention of ‘almost professionalizing informal care’ (Le Bihan et al. 2019: 591; see also Kröger and Bagnato 2017: 210–11).

Regarding public expenditure, formal home care has expanded almost everywhere in the new millennium (Gianino et al. 2017: 951). It holds true that, concerning the role of statutory programmes, international variety is remarkable when it comes to eligibility criteria and the magnitude or type of support (Barczyk and Kredler 2019; Roland et al. 2022). The North–South gap in terms of welfare state coverage has remained striking. Cash benefits and direct payments are marginal in some countries while expanding or even being predominant elsewhere. Some European countries have seen a trend towards more comprehensive and integrated service provision, whereas in others such initiatives have been patchy and have espoused a more limited public backing – which also implies huge discrepancies concerning the role of caregiving by lay people (notably those co-residing with a care receiver and others). Overall, however, the trends in this field have been highly dynamic over the last decades, including with respect to structural characteristics of related welfare programmes. The development of domiciliary services has been an international success story compared with the situation in the 1970s and in the late 2010s (Bode 2017a; Halásková et al. 2017; Fischer et al. 2022). Some countries have seen a strong uptake of formal care supply services, alongside a marked decline of informal arrangements (up to 20 per cent, when measured in care hours, see Barczyk and Kredler 2019). This development – which twins with efforts to boost the weight of personal care (see below) – involves a reduction of lost employment opportunities for private caregivers, as well as greater opportunities for the frail elderly to access services without (fully) depending on the commitment or ‘grace’ of spouses or (adult) children. In all these dimensions, the above trends reflect a process of social modernisation – even though new gaps have appeared in many places and the ‘domiciliary turn’ has had ambivalent repercussions which will be delineated in the following subchapter.

## 9.2 COUNTER-MOVEMENTS: INSTITUTIONAL CHANGE PUTTING LATER LIFE UNDER (EXTRA) STRAIN

For many years now, European societies have been engaged in a fervent public debate about both demographic change and the (alleged) requirement to set limits to the expansion of collective retirement provision and adjacent welfare programmes. Internationally, the idea of ‘cost containment of old age expenditure’ (Arcanjo 2019: 512) has led governments to dismantle welfare programmes expected to offer social security in later life. From the 1990s onwards, pension reforms have triggered new distributional dynamics which (are likely to) put extra

strain on the lives of twenty-first century elderly people, beyond the biological restrictions also related to old age (Jang 2019; Peris-Ortiz et al. 2020; Ebbinghaus and Möhring 2022). For many of those looking ahead to life after work, the result is looming ‘pension insecurity’ (Olivera and Ponomarenko 2017) and ‘disorientation’ when it comes to retirement planning (Bode and Lüth 2021).

Crucially, past reforms entailed a retrenchment of the role of public pension pillars in many places (Vlachantoni 2022: 263). While total expenditure continued to grow, the level of benefits decreased (per head), with future beneficiaries hit harder those about to retire soon. In Anglo-Saxon countries, public pension provision per person over 65 had been ‘failing to rise in line with national income’ (Bridgen 2019a: 18) since the 1980s, despite catch-up effects from measures enacted in more recent times. Social insurance based systems have taken a similar route as standard (real wage) replacement rates have dipped over longer periods and – all else remaining equal – are set to fall (more or less) sharply in the future as austerity reforms gradually take effect for new cohorts of pensioners. Old-age provision has been curtailed by different means, among which are the introduction of a lifetime earnings logic into the benefit calculation model (with a tight nexus between payments and contribution records, e.g., in Italy and Greece), the application of a demographic factor in pension adjustment formulas (e.g., in Germany), or a de-indexation of pensions by referring to prices instead of average wages (e.g., in Italy). Reformers have defended these policies as attempts to place public pensions (including social insurance schemes) on a more secure footing, assuming that current societies cannot support a greater share of national wealth being used for retirement provision, for instance via higher taxes or extended social insurance contributions (Bonoli 2000; Ebbinghaus 2011; Fornero and Willke 2020). Accordingly, the generosity of public pension schemes has declined markedly in many jurisdictions, especially since the early 2000s.

A second major change in the architecture of Western European pension systems was the increase of the legal retirement age. There has been some debate whether this equals a loss of pension wealth, given growing life expectancy including a higher number of healthy years of living for some parts of the population (though not for all). Regardless, decisions to raise the retirement age have entailed the reversal of a long-standing trend towards an ever more extended ‘silver age’ as a time of carefree (economic) dependency. This U-turn, applauded by many economic experts and ‘mainstream’ politicians alike, has come with new options for flexible transitions from gainful employment to inactivity, including phased retirement and post-career bridge employment (Hofäcker and Radl 2016). However, in the recent past, numerous senior workers in Europe have been unable to avoid their early exit from the labour market – including withdrawal for health reasons – which implies a loss of pension entitlements for them once the legal retirement age is increased (Street and Ní Léime 2020). Concomitantly, a growing proportion of pensioners – among many on low incomes – has been found to be working after retirement for financial reasons (Dingemans and Henkens 2019). This also includes persons on a low (pension) income being forced into poor quality jobs. This has been a longer-standing trend in North America (depicted there as a ‘changing nature of retirement’, see Coronado 2016) and has emerged as a new pattern in various parts of Western Europe.

Thirdly, the Western world has seen a crisis of funded pension plans, which had long been trumpeted as perfect substitute of, or alternative to, public retirement provision (Holzmann 1999). Numerous plans have not delivered on their promise in recent times, which has signifi-

cant implications in a context in which public (pay-as-you-go) pension provision is decreasing in relative terms. In various countries, this movement, branded ‘pension privatization’ by many (see Gilbert 2002: 103–9; Ebbinghaus 2011; Orenstein 2013; Oreziak 2022), was endorsed by a fiscal promotion of funded saving plans, predicated on hopes that savers would reap the benefits of financial markets which (for a while) promised to yield growing interest or profit rates for all. It gained additional momentum with attempts to shelter investments by pension protection funds. Given a global propagation of the idea of ‘self-made pensions’ (Bode 2007), workers became invited to craft their individual retirement arrangement by contracting a personal saving plan or choosing a scheme set up by their employer (Stevens 2017). In countries where such occupational schemes commonly offered little more than a fringe benefit to white collar workers higher up the social ladder, a popular political project consisted of transforming these schemes into a mainstream pension pillar (e.g., in Germany). Elsewhere (e.g., in the UK), auto-enrolment clauses were introduced into these schemes, in order to push investments in financial market products contracted by companies on behalf of their workers, with the latter remaining uncovered only if they explicitly contradicted a plan membership. A further model consisted of attracting workers to state-run funded pension plans (e.g., in Sweden). In some places, moreover, plan members became entitled to use accrued pension capital for other purposes, with early savings withdrawal or lump sum payments replacing life-long annuities at the point of retirement.

Overall, old-age provision in Western Europe has ‘moved toward the US/UK model’, which has induced (partial) ‘convergence among European pension systems’ (Fornero and Wilke 2020: 37; 13). Reforms in the 2010s have intensified the reliance on financial markets and risk individualisation in the area of retirement provision (Wiß 2019; Berry 2021). Under favourable circumstances, the respective arrangements may provide pensioners with a supplementary income, yet for those who come away empty-handed, the prospect of (a more) carefree dependency as discussed above is thwarted. Importantly, with the experience of the dot-com bubble bursting at the end of the 2010s, the ‘risk diversification’ rationale applied to these arrangements no longer appeared to be a silver bullet to cope with the obvious volatility and heterogeneity of these markets. As a reaction to this, proponents of private pension schemes and financial advisers recommended investing savings in unprotected, publicly traded venture capital and the like, to increase the chance of receiving decent investment results – albeit at the risk of ‘low or negative returns on the contributed capital at the point of retirement due to investments in ... volatile assets or inflation’ (Fornero and Wilke 2020: 34). Concerning occupational plans, similar dynamics come into play, as most of these plans have morphed into ‘defined contribution’ schemes, with investment risks shifted to plan holders and with less secure economic outcomes. In the aftermath of the financial crisis in 2008, many plan members had to cope with reduced payments, given new indexation rules and nominal pension cuts (e.g., in the Netherlands, see Westerhout 2020). In other places, shrinking coverage by funded pension plans has worsened the prospects for many future retirees (Pavolini and Seeleib-Kaiser 2018). More generally, in the context of post-industrial capitalism, such plans come with systemic risks. Given a global dearth of investment demand to absorb the savings of both plan investors and the wider economy, ever greater saving efforts may be required to ensure those benefits for which plan holders aspire. Furthermore, in periods during which financial markets are plummeting, funded plans usually perform poorly. Thus, during the 2010s, interest rate cuts diminished pension fund assets internationally (Allianz 2020: 21).

Experts anticipated greater uncertainties regarding future pension wealth, irrespective of whether or not the ‘low return environment’ (Clark et al. 2018) of the 2010s would be a recurrent pattern in the near future (as far as secured liabilities are concerned). In the early 2020s, soaring costs of living have added to extant worries as they eat into the real value of accrued savings. Altogether, then, many twenty-first century retirees seem to be condemned to losses in purchasing power. The international ‘recommodification in pension policy’ (Anderson 2019b: 599), ‘diminishing individuals’ social rights by increasing market reliance’ (Bridgen 2019a: 20), has affected low-income households in particular, as these have invested little money in funded savings plans while being hit by the incremental curtailment of social security pensions. The risk of old-age poverty (that is, having 60 per cent of median income at one’s disposal) remains an obvious threat, at least for specific sections of the European population (Ebbinghaus and Möhring 2022: 92). Against this backdrop, the vision of carefree dependency is fraught with considerable uncertainty in many parts of twenty-first century Europe.

Importantly, to the extent that pension income is needed to pay for care during old age, this trend has serious implications. Over the last decades, LTC services in Western Europe have developed in a ‘cost-containment policy context’ (Le Bihan et al. 2019: 591), with this implying spending caps (Kröger and Bagnato 2017: 204) or ambitions to economise on human resources (Fine 2020). Concerning the establishment of formal care programmes in Southern Europe, a long catch-up process was brutally interrupted by the financial market crisis at the end of the 2000s (Dorigatti et al. 2020; Aguilar-Hendrickson 2020). Elsewhere, reforms were undertaken with the (more or less explicit) intention to contain the rise of public expenditure due to population ageing, sometimes by ‘forcing many users to fall back on the family or turn to the informal market’ (Leibetseder et al. 2017: 145). In some jurisdictions, LTC policies have continued to conceptualise kinship support as an integral element of mixed home care arrangements (e.g., in Germany, see below). In this overall context, worries about the (future) ‘availability, affordability and costs of care’ (Ilinca and Simmons 2022: 4), as well as experiences with ‘care poverty’ (Kröger 2022), have become pressing issues internationally. At the same time, problems associated with informal caregiving have been ‘at the core of policy debates’ across Western Europe (Le Bihan et al. 2019: 590). In systems with a longer tradition of formal domiciliary care, public support has decreased, for example in terms of the number of funded hours of professional service; even Nordic countries such as Sweden have witnessed a ‘decline in the proportion of older adults receiving home-based services’ (Theobald and Luppi 2018: 633). Elsewhere, direct payments, introduced in various jurisdictions from the 1990s onwards, have incentivised citizens in need to pay non-waged caregivers for supporting them in their homes. In this vein, care-related welfare benefits have increasingly been used to purchase 24/7 ‘live-in’ assistance provided by migrant workers (Leiber et al. 2019; van Bochove and zur Kleinsmiede 2020).

Concerning formal care provision, the dominant pattern in the new millennium reveals a gap between prevailing expectations and capacity for effective service provision (Ilinca and Simmons 2022). Importantly, LTC systems have seen a ‘market-oriented restructuring of the publicly financed formal care infrastructure’ (Theobald and Luppi 2018: 630), based on NPM templates in many places (Wollmann 2022). This movement, proliferating in many parts of Western Europe, has been spurred by both private businesses interested in gaining profitable investment opportunities and governments seeking less expensive models of service provision (Armstrong and Armstrong 2020). Concerning residential care, private companies

have become involved in building, buying and managing (chains of) nursing homes with rather secure public funding. Although a (slightly) decreasing proportion of elderly people in Europe has come to live in care homes (Gianino et al. 2017), this sector can be seen as a perfect showcase for what Farris and Marchetti (2017) have referred to as the ‘corporatisation of care’, even in welfare states with a long tradition of public service provision such as Sweden (see Ulmanen and Szebehely 2015). In this overall context, residential care services have undergone an intensified process of rationalisation (see Bode 2017b; Hoppania et al. 2022; Orupabo 2022), in part because squeezing the labour force and engineering workflow patterns along business lines can be highly lucrative for providers. Besides the traditional restrictions mentioned earlier, low staff ratios and reduced workforce retention have (further) diminished the popularity of care homes among potential users. Under the pressure to make profits or cope with insufficient funding, managers have been driven to reduce the time-slots assigned to each resident, to extend the use of lower-skilled staff, or to introduce supervision tools based on standardised work prescriptions. Private sector providers have excelled in developing such management technologies, which have then spilled over to many non-commercial undertakings that operate in the same market environment. In the absence of realistic approaches to quality inspection, however, care outcomes have been problematic in many places (Lewis 2022). While living conditions in care homes certainly differ across Europe and between social classes, residential care provision has often developed into a solution of last resort, sidestepped by anyone able to afford and manage this.

While being more popular, the supply of domiciliary care has seen similar dynamics over recent decades (Bode and Streicher 2014; Hayes 2017; McDonald et al. 2019; Ravalier et al. 2019; Vänje and Sjöberg Forssberg 2021; Palmqvist 2022). In many parts of Europe, this sector has been found to suffer from fragmented service delivery; interrupted continuity of care; and rapid staff turnover. In this context, ‘the integrating social relationships on which care has traditionally rested have come under increasing stress’ (Fine 2020: 182). Commercial service provision has come to play an important role here as well, although small providers prevail in most jurisdictions. The developments mentioned above also affect *personal care* beyond nursing and medical treatment. In some European countries (e.g., Belgium or France), longer-established providers of home help have seen the advent of competitors operating outside of the LTC field (e.g., firms offering domestic services). Elsewhere, short term jobs and casual work have become more widespread in the home care sector. Public policies have also promoted voluntary sector initiatives, encouraging grassroots mutual support by pilot schemes or local subsidies, with the hope that elderly care may benefit from a movement of ‘re-communitarisation’ (Leibetseder et al. 2017: 148; Cameron et al. 2022). The country sections below illuminate further details concerning all these trends.

Overall, to the extent that growing needs collide with the above restrictions, cared-for dependency in the new millennium is set to become less carefree for both frail elderly people and their relatives. True, differences between welfare regimes matter, as the established regulatory frameworks impact strongly upon how services are managed and provided (Bode 2006a; Burau et al. 2007; Lopes and Poškutė 2022; Roland et al. 2022). In many respects, however, the LTC sector exhibits a cross-national trend towards less coherent service provision. Importantly, related developments are intertwined with dynamics of social change, which have altered the ways that European citizens anticipate or experience situations of (cared-for) dependency in later life. A first external influence on the public organisation of



old-age provision connects with the changing architecture of the capitalist economy, namely the upswing of the financial industry and adjacent businesses which have become major players in these areas internationally (Pieper 2018). These forces have often propagated the promotion of private insurance (broadly speaking) as an effective instrument for organising income transfers to older people. This used to be based on the contention that demographic tensions ‘pitch the generations directly against each other’ (Allianz 2020: 2), echoing what various scholars have referred to as evolving ‘dependency ratios’ (see Valkonen and Barslund 2019; Anderson 2019b: 596; Vlachantoni 2022). While there is overall little evidence of an escalating conflict between near-future pensioners (the baby-boomers) and younger people (see Hess et al. 2017), this discourse has dominated processes of public opinion building in many European countries over the last decades, leading wider sections of the population to accept, or even welcome, reforms that reduce publicly guaranteed social security in later life as well as devolving greater parts of retirement provision onto saving plans traded in a volatile financial market (Betzelt and Bode 2017, for the case of Germany).

To be sure, in most parts of Western Europe, lower fertility rates and growing longevity have certainly altered the conditions under which a national collectivity is dealing with the organisation of later life. That said, dynamics in politics and civil society (see Chapter 6) matter greatly here. Thus, the above ‘strategic’ warnings against an ‘apocalyptic demography’ (Robertson 1997) have contributed to the staged life course model of the industrial age and the related generational welfare contract being called into question on a greater scale. A further case in point is the emergence of a cross-national ‘working longer consensus’ (Ghilarducci 2021) connecting with a call for the right to a personalised transition to retirement. While this proposition accords well with the idea of individual autonomy in later life, it primarily suits the interests of (upper) middle class citizens as a social group that has come to question the concept of mandatory retirement (Steiber and Kohli 2017). Concerning the above consensus, political forces close to this milieu seem to set the tune internationally, notwithstanding that ambitions to postpone the legal retirement age (as a start of pension benefits) have found limited support among Europeans (Hofäcker 2015) – possibly because working longer years does often not increase well-being during later life (Sohier et al. 2021; Bellés-Obrero et al. 2022). In the twenty-first century, gainful work proves burdensome for many older employees (especially those in poor health) as it connects with both strong pressures to perform and ever more rapid technological change. Over the last decades, this experience has incited growing sections of the labour force to seek options for early retirement. In parallel, many older Europeans go through a troublesome transition to retirement (Phillipson 2019). Thus, although their careers are overall longer than in earlier times, numerous employees incur the risk of ‘involuntary retirement’, notably late career job loss and early labour force exit (see Steiber and Kohli 2017). In many jurisdictions, these incidents have become pressing concerns in so far as they often prevent retirees from receiving a full pension. Indeed, due to disrupted career paths and longer periods spent in the educational system, ‘the actual working life span is ... in many cases markedly shorter than the stylised one’ (Allianz 2020: 14). Together with the repercussions of post-industrial labour markets – such as the proliferation of low wages, interrupted careers and enforced or voluntary part-time work (see Chapter 5) – this induces income losses both prior to and after retirement, in part because pension reforms during the last decades have restricted options for ‘subsidised’ early retirement (Street and Ní Léime 2020).

All these dynamics combine with ‘biased’ processes of public opinion building to make late life less safe in material terms and from the perspective of future retirees.

Finally, while the transformation of pension systems impacts upon the budget that older people have at their disposal for compensating long-term care dependency, related opportunities are also influenced by socio-cultural dynamics in this particular realm. Thus, over the last decades, both the role of informal care and patterns of intra-familial solidarity have changed markedly within Europe (Barczyk and Kredler 2019). In particular, the (creeping and unequal) transition from the traditional to a new gender regime has had repercussions on typical family arrangements across Europe. Although traditional role models have not died out and continue to influence contemporary life course decisions, filial obligations concerning practical long-term caregiving have lost ground in many Western countries; concomitantly, the interest of both relatives and care recipients in formal service provision has grown (Pinquart et al. 2018). This development comes along with the enhanced labour market participation of both men and women, which often prevents the frail elderly’s children (and sometimes spouses) from extensive private caregiving. However, notwithstanding growing expectations towards broader (publicly orchestrated) professional support, LTC systems in many countries still put a strong onus on families (see the country studies below). Combined with the prevalent unpopularity of residential care (see Lehnert et al. 2019), this induces a high care burden to which middle- and upper-class families have often reacted by hiring low-status home helpers (‘live-ins’; domestic part-time workers) from outside Western Europe (Hellgren and Hobson 2021). Besides more fundamental ethical questions regarding this care model, shortcomings in terms of service quality have been perceived in many cases. This undergirds the impression that cared-for dependency in twenty-first century Western Europe is frequently problem-ridden with respect to the well-being of both private caregivers and care recipients (Österle 2018).

### 9.3 SERVICES MOVING IN FROM THE PERIPHERY: THE DYNAMICS OF PERSONAL CARE

In the late twentieth century, European societies saw the emergence of professional home care arrangements, mostly as an add-on to private support to frail elderly citizens. Gradually, this option became an available ‘solution’ to the challenges associated with impairments in later life, showing a potential to make care-dependent elder citizens (more) independent from their kinship (Anttonen et al. 2003). Scandinavia was a forerunner in establishing more comprehensive service packages in this realm, with no (or low) co-payments claimed from users. Elsewhere, the role of private caregiving dwindled as well, yet the onus for filling gaps was initially laid on parishes and charitable organisations. Public institutions became involved as well, yet their role long remained confined to piecemeal interventions, with local authorities retaining a ‘wide discretion over ... home help charging strategies’ (Means et al. 2002: 30). In the new millennium, the Nordic model of publicly arranged multi-service provision has remained an international exception, as most domiciliary arrangements in (the rest of) Europe presuppose the availability of private caregivers in one way or another.

That said, in various jurisdictions, non-familial social support, after having long been situated at the periphery of LTC systems, slowly became an integral component of these arrangements (Gianino et al. 2017: 953). From the 1980s onwards, the idea that human rights to ‘organised help’ in later life should comprise other interventions than mere body-related

acts of assistance became increasingly popular among relevant stakeholders. In some places, related activities were legally enforced; elsewhere, they took shape on a more experimental basis. Progressively, domiciliary care provision came to include person-centred support as something different from medical intervention, nursing and the maintenance of bodily hygiene. The underlying rationale was to help elderly people ‘to manage their daily activities’ (Kröger and Bagnato 2017: 204–5) by introducing a ‘social component’ into LTC schemes (Gianino et al. 2017: 948) – even though, in practice, this component often remained enmeshed with body-related assistance.

One of the notions in use to account for the ‘mixed character’ of related interventions is personal care – even though this concept appears fuzzy for various reasons. As Twigg noted a while ago, ‘personal care lies across the medical-social boundary and as such presents particular problems for welfare systems’ (Twigg 2000: 119), in part because of blurred boundaries between institutional, organisational and professional realms. Kröger and Bagnato (2017: 205) note that, internationally, there has never been a clear separation between healthcare and other types of assistance related to the state of human frailty (the two authors refer to such assistance as ‘social care’). As for the notion of personal care, the term occasionally designates activities of privately employed home helps supporting elderly people with functional limitations (Melchiorre et al. 2022a); elsewhere it refers to specialised care workers assisting home-dwelling users suffering from dementia (Sutcliffe et al. 2021). The notion of ‘home help’ is also used in this context, often with a focus on practical chores in a person’s household (cleaning, cooking etc.).

Certain definitions of personal care stress that it is about facilitating the organisation of ‘ordinary life’ for those unable to manage it on their own. Related support may comprise activities such as bathing, dressing, nutrition and taking medication but also help to maintain ‘discreet routines’ (Hayes 2017: 2) – which points to the intimate nature of these activities. Browsing through the concepts prominent in both the academic literature and the universe of LTC policies, the range of tasks performed under the label of personal care appears even broader. Thus, tasks may include activities as diverse as preparing meals, home-keeping, shopping, escorting users to activities away from home, organising leisure time (e.g., by taking people out or on excursions), sorting out personal affairs, or offering companionship and personal advice in difficult situations. Personal care may also include activities of ‘reablement’ (Rostgaard and Graff 2023) through which users may regain capacities to organise their day-to-day life according to subjective preferences. In modern societies, caregiving is often associated with feelings of love or affection and has long been considered to belong to the informal sphere of human life. However, the rise of occupations with a remit to look after frail citizens in need of social support has blurred the distinction between informal and formal assistance in many places (Hagedorn 2022). While extant typologies frequently distinguish between practical chores and more sophisticated acts of help, there are good reasons for defining personal care as a holistic endeavour that potentially comprises any kind of support that care-dependent citizens (may want to) receive outside both the healthcare field and residential care (Jonsdottir et al. 2004; Wellin and Jaffe 2004; Abrams et al. 2019; Fine 2020).

Internationally, domiciliary care settings have proved quite dynamic over the last decades, featuring a changing landscape of actors and organisations, evolving role-sets and a transformation of what is often referred to as an elderly care package (Da Roit 2010). Recent developments in this area have been quite complex, as the following country sections will bring to the

fore. The point of departure is the observation that contemporary Western European societies increasingly value human independence including in the event of care dependency (see Lehnert et al. 2019) while (re-)developing LTC schemes with ambivalent ramifications (as discussed above). Accordingly, the focus hereafter lies on those regulatory frameworks that enable or set limits upon the provision of personal home care in the above sense. The analysis, which again adopts a cross-national perspective, casts light on both progress and stumbling blocks concerning the implementation of related commitments. As the access to domiciliary care services also depends on financial resources elderly people have at their disposal, each country section contains a brief sketch of the evolving pension system, before portraying the evolving devices in the (sub-)sector under study.

#### a. Norway

Norway is known as offering most elderly citizens decent financial opportunities to cope with the event of care dependency. The level of retirement provision is outstanding internationally (Allianz 2020: 10ff). The (public) national insurance scheme, mandatory for all employees, provides wage replacement rates at a level of around 50 per cent to average workers, as well as supplements related to special circumstances (disability, being a widow, having been involved in private caregiving, etc.). In addition, minimum pensions are available for those who do not qualify for this scheme. Retirement incomes are topped up by occupational pension plans which exist in most sectors of the economy. Workers who are not enrolled in such plans but meet the minimum requirements are covered by a mandatory occupational pension programme. Individual private savings vehicles ensuring monthly retirement payments are not widely used. Old-age poverty is low by international standards and has declined over many years (Ebbinghaus et al. 2020).

However, retirement provision is likely to become less generous in the future regarding both public benefits and income drawn from funded pension plans. A reform that became effective in the 2010s (Kudrna 2017; Hagelund and Grødem 2019; Grødem and Hippe 2021), while maintaining the redistributive character of the public pillar, has established a stronger link between life-long earnings and retirement benefits, due to the introduction of a notional defined contribution model. In this way workers accrue pension entitlements over their entire professional career (with benefits being no longer calculated by reference to the best 20 income years), even as the pension level is set to decrease in proportion to observed increases in longevity. Together with a less wide-reaching salary adjustment guarantee, this implies a tendency towards lower wage-replacement rates. While the above reshuffle has boosted investments in occupational and private savings plans, financial risks have been devolved to plan holders. For numerous households, a potential drop in pension income adds to a mortgage burden, which is high by international standards. The minimum pension scheme, providing only one third of average earnings on average, covered one fifth of the elderly population (particularly women) by the end of the 2010s. Non-means tested basic pensions were abolished in the 2000s, which has induced a higher level of old-age poverty. Hence, financial resources to pay for expenses related to care-dependency are modest for some sections of the Norwegian population.

That said, the LTC system is often judged as being the most generous one in Europe as it offers a wide array of publicly funded services. These are embedded in a tight infrastructure in which paramedical and social care are amalgamated (Genet et al. 2012: 56; 59). For some time now, elderly care provision has not been subject to a distinctive legal

framework but conceptualised as being part of a broader human service sector relying on tax-based funding. Citizens have become entitled to public support within both residential and in domiciliary settings, some of which is specialised (dementia, palliative care, etc.). Municipalities have been entrusted with orchestrating and delivering professional services, being accountable to the national state from which they receive block grants that add to local tax income (Sogstad et al. 2020). In the twenty-first century, Norwegians can count on strong state intervention concerning long-term care, although ‘successive governments have advocated increased voluntary contributions’ in a context in which the ‘prevalence of care volunteering’ proves to be modest (Skinner et al. 2021: 647; 658).

Regarding the role of families and private caregiving, economic and social independence in old-age has been the prevailing norm from quite early on in the twentieth century (see Jacobsen und Mekki 2012: 127). Since the dual earner model has become hegemonic in Norway, spouses and children of elderly people are not considered a major source of practical support – and ‘formal caregivers cannot assume or expect informal caregivers to contribute to care provision’ (Skinner et al. 2021: 649). Services used to be provided by public organisations, although care homes are run by non-state providers in a number of cases. By international standards, the degree of professionalisation in the LTC system is striking, with trade unions being powerful players even in the domiciliary sector. Where citizens perform informal care work in collaboration with professionals, the division of labour tends to be pre-determined and task-specific. In most cases, private caregivers become involved when care recipients’ needs are moderate – whereas the welfare state steps in when informal effort and resources prove to be insufficient. Private caregivers continue to participate in the labour market in the majority of cases, and the tendency over many decades has been towards a decrease in the level of informal care altogether (which is a general Nordic pattern, see Barczyk and Kredler 2019: 330).

Personal care in the above sense is an integral part of the local welfare state and an entrenched institutional feature of the Norwegian LTC system, as the latter offers a ‘dignity guarantee’ to frail elderly people (see Christensen and Wærness 2018; Ervik 2019; Sogstad et al. 2020). This system features strong local autonomy in the orchestration of service delivery which is rooted in the pioneer role of ‘welfare municipalities’ (Hanssen et al. 2001) at the beginning of the twentieth century – and in some respects, the above autonomy has continued to have strong effects during recent times (Hansen and Neumann 2023; Rostad et al. 2023). While local authorities had (and continue to have) strong ambitions to shape the structure of welfare provision including for elderly people, national policies, from the 1960s onwards, were geared towards guaranteeing personalised domiciliary support across the entire territory. Home nursing became institutionalised in 1982 (Christensen and Wærness 2018).

Regarding the situation in the new millennium, the national LTC framework stipulates that all municipalities run a unified local welfare system – composed of primary care, social work, nursing and home help (personal assistance) – and coordinate activities with hospitals (which are overseen by the regions). With the ‘care plan’ enacted in 2008 and the so-called coordination reform taking effect in 2012, the system’s rationale consists of ensuring person-centred, seamless services to all sorts of users. Need assessments include judgements about a claimant’s range of motion (such as walking around outside), the ability to take care of one’s own health and opportunities to participate in social activities

(Holm et al. 2017). Subsequent to these assessments, municipalities settle on the type(s) of support and the service package to be awarded to care applicants. The package is outlined in an individual decision letter which serves as a contract between the local authority and the user. Most services are provided by the local authorities themselves; in some places, non-state providers step in, traditionally in a long-standing partnership based on secure public subsidies (Jacobsen and Mekki 2012: 128). There are no direct payments to users, although, under exceptional circumstances, some care-dependent citizens have the option to recruit family members employed by the municipality (on a typical salary).

While (para)medical support (nursing and bodily care) is free, municipalities can charge for other types of formal help, albeit at a low level for people on modest incomes. The available service package includes personal assistance and ‘support contact’ for individuals or families deemed to require help to live a socially active life, for instance by participating in meaningful leisure activities. Related activities may require up to one quarter of the service hours awarded by a municipality (Holm et al. 2017). In quantitative terms, domiciliary nursing is much more important, yet studies reveal that nurses occasionally take over non-paramedical tasks including companionship (Strandås et al. 2019). In addition, many local authorities have set up home care teams which target distinctive patient groups (e.g., users with dementia) or provide specific services including rehabilitation (Sogstad et al. 2020; Rostad et al. 2023). Home care providers are obliged to run quality management schemes (based on input data in the first instance) and to conform to quality assurance norms, with related documents feeding into national databases.

Recent dynamics of change signal slight pressures on the delivery of personal care services. Thus, the governance of domiciliary support has undergone a process of formalisation, for instance concerning time management issues. Also, personal care providers have become obliged to collaborate with secondary healthcare institutions in ways amenable to new forms of bureaucratic control; this is exemplified by the deadlines these providers must meet when taking care of users discharged from hospitals (otherwise, the municipality is charged with fines). Moreover, domiciliary nursing care services have been confronted with extended worklists and requirements on service documentation, with ‘imposed administrative work’ eating into patient time (Vabo 2012). In addition, various municipalities have introduced a purchaser–provider split in their administrative set-up, seeking to ‘manage service allocation within divided budget frameworks’ (Strandås et al. 2019: e4, drawing on work by Mia Vabo). In some urban agglomerations, outsourcing via public tenders has increased interorganisational rivalry, inducing a ‘slightly growing share for private forprofit provision’ (Ervik 2019: 115) – notwithstanding that ambitions to go further have met strong resistance during the 2000s (Vabo 2012: 188). As for the quantity of support offered to care recipients, there has been a ‘tendency towards downgrading the services’ ... and re-emphasising ‘the socio-medical split’ tackled by earlier reforms (Christensen and Wærness 2018: 25). As the mantra of free choice of provider has become popular in Norway (as well), seeds of quasi-marketisation have germinated in some places, including in the arena of home help.

While there has been a general shift towards domiciliary service provision, a greater emphasis has been placed upon home-care nursing. At least, experts have observed an incremental medicalisation of domiciliary support (Christensen and Wærness 2018) – which signals a move away from the holistic orientation inherent in the longer-entrenched

Norwegian approach to person-centred care. With tighter budgets, the outlay for the non-(para-)medical components of personal care have decreased in many places (Christensen and Wærness 2018; Strandås et al. 2019). The number of users receiving only home help dropped strongly between the 1990s and the 2010s. Elderly care has also been influenced by de-professionalised modes of social intervention (Christensen and Bikova 2022). In this vein, the LTC system has seen the influx of lower-qualified staff, with home care being ‘in a squeeze between the social needs of care receivers’ and the workers’ ‘limited time and resources’ in a context of strict care plans and rotating work (Skinner et al. 2021: 664). This results in fragmented visits and a lack of caregiver continuity. At times, budgetary restrictions seem to ‘force nurses to prioritize ... at the expense of compassion, caring, and quality’ (Strandås et al. 2019: e6), with some tasks being devolved to informal caregivers. All this sits uneasily with popular expectations towards the local state and its commitment to ensuring personal care for all.

#### b. Germany

In the Bismarckian German welfare state, a person’s financial opportunities to cope with care dependency had long been a dependent variable of entitlements to social insurance schemes. By international standards, male breadwinners in permanent jobs reaped retirement income benefits from schemes that roughly preserved the standard of living they had achieved in their working lives. Women without full contribution records had to rely on their partner’s pension if possible. Others had to claim means-tested social assistance, which often caused material distress in later life, although poverty among retirees was rather exceptional (van Vliet et al. 2020). In 2020, a new basic pension benefit was introduced within the social insurance pillar. Funded through tax-money injected into that pillar, it raised payments beyond the poverty line for a substantial proportion of retirees having gone through an incomplete career or longer spells of low-wage employment.

Notwithstanding this innovation, however, the German pension system has seen significant cuts to public retirement provision since the turn of the century. The system’s ‘liberalization’ (Bridgen and Meyer 2014) has come with a new institutional design whereby a growing share of retirement income is expected to be drawn from funded pension plans, both personal and occupational (Bode 2007; Wiß 2019). These plans, eligible for public subsidies and extended tax breaks, are partially protected against capital losses. After going viral for a while, they became much less popular from the late 2000s onwards, given a dire outlook for their profitability. Recent pension policies have sought to push the financialisation of retirement further, by offering enhanced state subsidies and by obliging employers to sponsor stock-market-based occupational plans of the defined contributions type, with fewer guarantees in terms of investment protection. Given constant volatility in twenty-first century financial markets, the result has been an uncertain future of retirement income for larger sections of the citizenry (Bode and Lüth 2021). A growing part of the population is faced with the prospect of future old-age poverty, given that – regardless of the new basic benefit – wage replacement rates in the social security pillar are set to decrease further. Non-public pensions appear unable to fill the gap; hence by the end of the 2010s, coverage with funded savings plans proved to be rather patchy even as full work

careers had become less ‘normal’ in the post-industrial labour market (Ebbinghaus et al. 2020).

For many citizens, this relative loss in pension income may therefore eat into the budget available for buying LTC services. Notably, for the bulk of the German population, pensions had never sufficed to pay for such support. During the post-war decades, people in need had to apply for means-tested social assistance benefits, and this concerned residential provision above all. For the rest, family-provided care was the prevailing pattern. However, the last decades of the twentieth century saw a significant expansion of formal service provision in domiciliary settings (Bahle 2008; Hagedorn 2022). Initially, the idea of professional home care addressed the frail elderly with no or little family support. In some regions, social care centres (‘Sozialstationen’) began to offer (small) service packages free of charge, using block grants from different sources. In 1995, the introduction of a new social insurance branch brought forth a more solid LTC regime, in part driven by the ambition to reduce the role of (means-tested) social assistance. This branch was partially modelled on other social security schemes, in tune with the corporatist heritage of the (conservative) Bismarckian welfare regime.

This long-term care insurance, which expanded progressively in the following years (for an overview, see Theobald and Chon 2020 or Hagedorn 2022), has been based on quasi-universal entitlements to services in both residential and domiciliary settings. However, in contrast to the healthcare insurance model, benefit caps apply, with a good deal of extant needs remaining uncovered. Concerning home care, the regulatory framework as established in the new millennium awards earmarked service packages in line with assessed needs up to a certain ceiling (Theobald 2018; Gruber et al. 2021). Additional social assistance, available only for a few very poor home care recipients, is contingent on a means-test and may be clawed back from heirs after death. Importantly, the LTC regime is based on a cash-for-care approach, with insurance benefits being used either as a (modest) quasi-salary paid to informal caregivers or for the private purchase of care-related goods and services (in the latter case, payments are higher). While private caregiving is still widespread, the above scheme has been increasingly used to pay professionals for selected care acts. From the 1990s onwards, the respective industry has grown markedly within a ‘regulated’ care market, composed of free-standing independent providers, with a majority being for-profit. Prices are agreed via regional collective contracts between quasi-public bodies and provider associations. In addition, quality assurance standards apply (for example, a minimum of skilled staff, prescribed care packages, the obligation to document activities etc.), along with ‘mild’ quality inspections based on provider visits, output checks and published reports.

Overall, the German LTC system has come to provide frail elderly Germans with a guarantee to receive services from trained professionals, supervised by line managers who have gone through vocational training in ordinary or geriatric nursing care (Gruber et al. 2021). Over many decades, domiciliary provision was largely confined to nursing and bodily care – that is paramedical services. Housekeeping services had been included in the LTC service package from early on, yet, initially, only a few recipients used this opportunity, given the benefit cap mentioned above. However, from the late 2000s onwards, the previously mentioned regulatory framework came to include elements of personal care (as defined earlier). Entitlements to personal care were extended further with public policies



aimed at breaking with the mere paramedical logic of the system in place (Theobald 2018; Hagedorn 2022). This included special arrangements for those users affected by dementia who needed attendance and care, but also offered new options to involve waged caregivers in the management of daily activities, albeit for a limited number of hours. For this purpose, earmarked subsidies to be spent on professional personal care services were introduced during the late 2010s. In addition, according to the regulatory framework enacted at this time, expenses up to 40 per cent of the awarded standard benefit could be used for non-(para)medical support including companionship. Local authorities can provide some additional funding for these type of activities (especially if users are poor).

In recent times, such support provided by waged staff has become overall more widespread. The workforce involved in this endeavour is often low-skilled, with most carers having taken only short introductory courses (Albert et al. 2022). Services are often orchestrated by a separate unit of providers otherwise engaged with the delivery of nursing care. While social care insurance funds or local authorities reimburse incurred costs for a few hours per week, the private purchase of extra services is possible in many cases. Notably, further special initiatives have been set up at local level to make domiciliary care more inclusive, for instance projects with a mission to monitor the health status of impaired elderly people and to give adequate advice to them. Funded by sickness funds, this mission has been largely health-related, with nurses looking after home-dwelling patients with a special health condition. Such services can help elderly people to sustain themselves when becoming frail.

Overall, recent dynamics of change bear witness to a creeping extension of the above arrangements – even though other types of domestic support have grown much faster, namely, informal ‘household assistance ... on the grey market’ (Theobald 2018: 126) as well as live-in care in various forms (Leiber et al. 2019). Concerning the latter, undocumented migrant work is widespread, alongside registered temporary stays orchestrated by cross-national labour market intermediaries that channel (female) care workers from less-developed parts of Europe into the German labour market (estimates suggest that 400 000 domestic caregivers were involved here at the beginning of the 2020s). Generally speaking, personal care in twenty-first century Germany has come to be performed by low-skilled employees on a modest income and working part-time in many cases, including older females or ‘young’ pensioners on modest retirement benefits. As employment conditions for (better-skilled) paramedical staff have improved, the home care industry has seen a marked hierarchisation of these conditions (Theobald 2018: 123). At the same time, occupational roles in the sector have been found to be fuzzy in various instances. Nurses at times provide social support, whereas staff for personal care are occasionally compelled to take over activities other than those for which they have been recruited. In this context, formal job descriptions are ‘undermined by the informal use of unskilled auxiliary staff’ (Haubner 2020: 91).

Although prices are set by regulators, market dynamics have been strong in the German home care system since the 1990s (Bode et al. 2013; Theobald and Luppi 2018). Up to the late 2010s, most domiciliary providers were tiny enterprises owned by (former) nurses. However, commercial chains have entered the market whereby rent-seeking behaviour is more widespread than in earlier times when social services were primarily run by the non-profit sector. In recent years, demand has outstripped supply (Gruber 2021), with staff

becoming a critical resource for providers. In some places, firms specialising in personal care have been found to compete with classical providers offering a larger portfolio of services. More generally, providers are incentivised to attract ‘profitable’ users (those who are ‘uncomplicated’, purchase additional services paid for privately or generate high reimbursements). Throughout all segments of the LTC system, ‘lean production’ and management tools seeking to rationalise service delivery processes have become the norm, with poor quality of service as a frequent result. A major background for this has been economic pressures intrinsic to the financial logic of the long-term care scheme (Haubner 2020: 97) and ensuing ‘cost reduction strategies by care providers’ (Theobald 2018: 124). Moreover, acute care hospitals have seen growing pressures to discharge patients as quickly as possible (Bode 2019c).

The LTC system as established during the last decades has seen further inconsistencies. Users have to select firms from a fragmented landscape of service providers, with difficulties in finding reliable information. In addition, caps on social insurance benefits imply rising co-payments unless private caregivers are available. To fill the gap, reforms have sown the seeds for a tax-subsidised private insurance market, yet the conditions on offer can hardly provide the expected relief. Accordingly, the number of contractors has remained low (Nadash and Cuellar 2017). All in all, the access to personal care services has remained predicated on widely self-managed arrangements involving different sources of support, including private help that is still the most widespread type of elderly care, despite a creeping defamiliarisation of the German LTC regime. In recent years, low wages and poor working conditions have been found to deter potential workers from engaging with a caregiving job (Jacobs et al. 2019; Gruber et al. 2021). This has led to bottlenecks in the access to domiciliary services altogether and has increased pressures on job-holding relatives for whom the limited amount of paid home care hours is often little more than a drop in the ocean.

### c. England

With regard to financial opportunities for coping with care dependency in later life, UK citizens are faring differently. Many frail retirees rely on their private savings when seeking non-familial support. Over the last decades, the distribution of pension income has become extraordinarily unequal, with many retirees receiving a basic allowance (Whiteside 2017), that is (currently), the essentially flat-rate ‘new state pension’ which has gradually replaced a former scheme offering benefits related to prior earnings (called the State Earnings-Related Pension Scheme). Conditional on a record of past payroll contributions, this allowance exceeds the means-tested ‘Universal Credit’ paid to poor people of working age while also being granted to (formerly) self-employed workers, citizens with low contribution records and individuals out of gainful employment due to care obligations etc. Governments may uprate this benefit over time according to the height of earnings growth, by referring to the consumer prices index or by a minimum fixed rate.

On top of this basic allowance, many UK citizens are entitled to second and third tier pension schemes, of which most are ‘funded’ and publicly fostered by tax relief programmes as well as regulation to protect investments (to some extent). By the end of the 2010s, these schemes altogether provided half of the total retirement income (which is an exceptionally high proportion by international standards), covering almost two thirds of the population. A good deal of retirement income is drawn from occupational pension

plans. Access to these plans depends on what employers (have) offer(ed) in terms of saving arrangements and on how much employees (have) invest(ed). In the early 2020s, the pension landscape still comprised (partially) unfunded schemes (especially in the public sector) that continued to pay (defined) benefits in line with incomes received prior to retirement. That said, a recent overhaul of these schemes has entailed both a new mode of cost sharing (with employees taking over risks over from employers) and a cost capping formula (with the plan's benefits following the flow of total contributions).

In general, reforms in the recent past have aimed to create a 'more socially protective public-private pension system' (Bridgen 2019a). From 2012 onwards, employees uncovered by an occupational pension have become automatically enrolled in a publicly governed (funded and defined contributions) saving scheme. Enrolees have a right to opt out, but this is rare overall. If desired, this second-tier plan can also be an arrangement managed by a quasi-public National Employment Savings Trust. The 2010s have seen a rise in plan coverage overall, with a growing number of citizens accruing a non-state pension. This auto-enrolment scheme was meant to compensate for the shrinking role of public benefits and old-style occupational retirement provision and the fact that the boom of individual savings plans had come to a halt in the late 2000s. At the same time, many company schemes have moved from a final salary to career average basis which is prone to reduce returns for many savers. For newcomers, the bulk of occupational plans has been transformed into a defined contribution model, which resembles the logic of private savings accounts. Hence, 'private pension provision in the UK has been increasingly individualised', and since the products' market performance 'has proved an unreliable partner' (Berry 2021: 3), old age provision in the UK has become more unpredictable overall. In addition, savings accounts do not need to be used for pension provision, given the 'end of compulsory annuitization' (ibid: 21). Plan holders can take out the accrued capital and invest it elsewhere; they may also spend the money for other purposes and then potentially be short of pension income later on. In this pension landscape, risks are incurred by employees who depend on capricious stock markets, volatile interest rates and unclear longevity predictions (Kaifala et al. 2021).

In this context, the UK continues to exhibit a high level of old-age poverty (around 25 per cent, see Ebbinghaus et al. 2020). This level is likely to persist in the future, given that means-tested minimum benefits, granted to one out of six pensioners, are modest (one third of average earnings). Furthermore, the 'new state pension' excludes workers with fewer than ten years of payroll contributions, as well as widows who can no longer inherit a state pension based on a partner's national insurance contribution record. As for occupational pensions under the auto-enrolment scheme, future payments may be low as numerous workers do not contribute more than the minimum rate so that savings plans often remain under-funded. More generally, for many active workers, low wages and unstable careers feed into poor income prospects in later life. For this population, resources to pay for special support in later life are limited overall.

In some ways, the British LTC system targets these (less affluent) sections of the citizenry. As the four nations of the UK are governed by distinctive policy frameworks, the following portrayal is confined to the situation in England (Rodrigues and Glendinning 2015; Baxter 2018; Harlock et al. 2020; Glasby et al. 2021; Hudson 2021; Allan and Darton 2022; Lewis 2022). In this jurisdiction, frail citizens receive public benefits only if

their incomes and assets are quite modest, although a recent reform has brought forth some change in this respect (see below). As a matter of principle, entitlements to publicly provided care services are means-tested and presuppose a need assessment, which is carried out by local authorities (applying national prescriptions in this process). Once eligible, frail elderly citizens can receive both (commissioned) residential and domiciliary services including personal care in the above sense. To pay for all this, local governments receive grants from the central state and use non-earmarked tax revenue. Care recipients may also receive a few hours per week of (purely paramedical) domiciliary nursing, performed by (nationally funded) National Health Service districts or contracted out to external suppliers including ‘social enterprises’ (Spilsbury and Pender 2015). It should be noted that informal caregiving by spouses or offspring has remained widespread in the UK as well. Two out of three elderly people receive some sort of informal help, although this is often less comprehensive than in continental and Southern Europe (given a comparatively strong labour market participation of women).

Severely disabled people are entitled to an ‘attendance allowance’, and even non-family caregivers may qualify for a carer’s allowance should they help someone outside the family for at least 35 hours a week (both cases are quite rare; benefits are close to social assistance level). Beneficiaries may also obtain direct payments in the form of a personal budget. UK experts refer to this option as ‘personalisation’ of elderly care (see Glasby et al. 2021: 408), epitomising the ‘choice agenda’ cherished by UK governments for some time now (Lindberg and Lundgren 2021). This money can be employed to hire personal assistants or a firm sending domestic workers. Most recipients resort to a ‘managed personal budget’, with their local council dispensing the money or placing it in an account of a third party (serving as a case manager).

For the bulk of care recipients eligible to ‘managed’ public support, local authorities use pooled funds (under a so-called ‘Better Care Fund’ framework) to purchase services from external providers on behalf of users. Providers are highly diverse (often for-profit) and involved in an open market which also comprises unregulated firms running ‘Uber-style’ technology platforms to broker personal assistance (Hudson 2019). A ‘Care Quality Commission’ is held responsible for the public inspection of providers, rating them (for their alleged performance) with a four-point scale and posting narrative reports about them publicly. Although local authorities are expected to consider recommendations from integrated health and social care units during the commission process, they have leeway in fixing eligibility rules and the way services are commissioned. When deciding on service packages, their agents may also consider the availability of informal caregivers. At the same time, one out of four of those receiving formal services are self-payers and purchase services independently (Baxter et al. 2020).

Personal care (in the sense discussed above) has traditionally been an explicit component of the service package that local authorities offer home-dwelling users under the label of community care (Baxter 2018). Today, related services may de facto comprise both bodily care and support for daily activities, being provided by staff lacking paramedical skills. As early as in the 1960s, local welfare departments were expected to take on responsibilities for ‘older people who would once have been deemed to lie well outside any definition of “need of care and attention”’ (Means et al. 2002: 95). For a while, these responsibilities addressed larger sections of the (local) population, although only domiciliary nursing was

free of charge while other services were means-tested. The norm was tailored support under a local case management regime. In this context, England has seen various efforts to merge health-related and social services into one publicly monitored care scheme. In formal terms, these efforts have become more systematic over time, as indicated by mergers of National Health Service and adult social care budgets or by the development of nationwide standards for the composition of care packages (Harlock et al. 2020). More recently, one target group has been people suffering from dementia (Backhouse and Ruston 2022). In addition, steps were taken to give users greater discretion about what kind of support they would prioritise (Rodrigues and Glendinning 2015).

The latest dynamics of change appear inconsistent. Under the regulation in force in the early 2020s, all fragile elder people have a right to get a care plan drafted by their local council even when the latter does not pay for services. Recent reforms have urged local authorities to invest in support planning and brokerage activities to assist holders of a personal budget in organising adequate support. Although a sliding scale of co-payments based on income applies, free services are granted to users on a low income. Since 2023, the national policy framework contains an upper threshold concerning the amount of private money citizens (will) need to spend on care services over their lifetime, even as the total amount of public funding per person is supposed to increase. This connects with higher caps concerning chargeable assets of care recipients. From this angle, the English LTC system seems to have expanded in recent times.

However, the creeping institutionalisation of personal care (at home) is fragile. First of all, in most places, the volume of publicly paid hours of domiciliary support has not kept pace with the soaring demand. After the outbreak of the financial market crisis, cuts to the central grant that the national government transfers to local councils often entailed reduced services. In a context of austerity politics, services were concentrated on the more severe cases in many places, with ‘fewer people receiving services ... despite a likely increase in need’ for them (Wiener et al. 2020: 22). While it seems that national efforts have grown again more recently, this is unlikely to reverse the trend towards a partial re-familiarisation of elderly care (Bode et al. 2013: 846; Dowling 2022). Secondly, although local conditions vary, the infrastructure for domiciliary elderly care appears highly fragmented and uneven in many places, given a multitude of providers ‘tinkering around’ with unskilled workers, high staff turnover and volatile market dynamics caused by both ‘unregulated’ competitors and a ‘widespread ossification’ of the commissioning process in which local authorities are faced by a ‘loss of organisational memory and the departure of experienced professionals’ (Hudson 2019: 418). In particular, small-scale providers (and their clientele) incur a permanent risk of plant closure, even though public authorities tend to offer large contracts to big firms offering the lowest price while they are frequently unable to oversee the practice of these firms, given the little resources available for case management. In turn, numerous providers have been found to resort to precarious (often ‘zero-hour’) employment contracts with low- or non-skilled workers, which can lead to a poor quality of service. Thirdly, a similar effect is produced by the fact that commissioned care packages are imbued with role ambiguity (d’Astous et al. 2019; Ravalier et al. 2019; Allan and Darton 2022). In many instances, the involved staff are expected to perform tasks they have not been trained for, including nursing care (see Chapter 14). Users struggle with structural uncertainty since, in the absence of an enforceable right ‘to a particular level of care’ (Wiener et al. 2020: 23),

they can never be sure of what precisely they will receive. When being a self-payer, they are faced with a quite opaque service infrastructure in which the ‘postpurchase appropriateness and quality of care ... is not monitored in the same way’ as for those who receive services under the public (budget) regime (Baxter et al. 2020: 463). Overall, the promise of free personal care for all, under debate in English politics for many years now, seems to remain unfulfilled in the early twenty-first century.

#### d. Italy

Concerning financial opportunities for managing care dependency, the post-war pension system in Italy could long be considered an important building block. While reforms launched from the 1990s onwards have altered this system in a couple of respects (see below), retirement provision has remained relatively generous for the older generation, including many workers approaching retirement, at least in comparison with many other Western nations (Allianz 2020). At the end of the 2010s, one sixth of national wealth was spent on pensions, with the level of old-age poverty falling below the rate for the entire population. In the new millennium, the pension system still comprises both a public pillar and mandatory (pay-as-you go) occupational plans which offer decent wage replacement rates to larger sections of the salaried workforce. It also contains options for early retirement in the event of personal hardship. For some time now, the ‘pension net extends to workers on flexible contracts’ (Natali 2015: 52). In addition, recent amendments to this net have tackled the system’s segmentation along occupational group lines. Concerning workers with long careers, they also have recalibrated options for early retirement, which had been slashed by earlier reforms. Furthermore, a citizenship pension was available as a means-tested welfare benefit for retirees on incomes below the poverty line (Giuliani 2021: 596–600).

However, in the last decades, pension gaps have become obvious, and they are likely to grow in the future, with some scholars even speaking of a ‘looming social disaster’ (Pizzuto and Raitano 2022: 203). Thus, during the late 2010s, one third of elderly people received minimum pensions. While these were accessible with low contribution records (20 years of wages employment are sufficient), they only yielded 20 per cent of average earnings. More generally, the new millennium saw a quite ‘radical change in the Italian pension system’ (Natali 2015: 52). This, firstly, pertains to the abolition of minimum contributory pensions offering a more generous retirement provision than the minimum benefit scheme. Secondly, the public pension system was reorganised according to the principle of ‘notional defined contributions’ (Franco and Tommasino 2020). For those born after 1995, benefits were aligned with contributions paid during working life, according to records in individual notional accounts, even as their indexation began to depend on life expectancy data upon retirement. Overall, the result has been reduced entitlements to retirement provision in proportion to salaries achieved at the end of a worker’s career (the pre-reform formula had contained shorter reference periods for calculating pensionable earnings). Thirdly, with a ‘rapid tightening of the eligibility criteria for retirement’ (Franco and Tommasino 2020: 75), citizens unable to work up to the official retirement age have come to receive lower benefits – notwithstanding that, for some categories of employees, the aforementioned recalibration has opened up some new options (which implies that the long-standing tradition of early retirement still has traces left in Italy). Finally, although enrolment with occupational schemes has become mandatory for many waged workers,

hopes that this will compensate losses in public retirement provision may not be realised. By the late 2010s, only one third of the workforce had been enrolled in such schemes. While the Italian state had promoted the latter in various ways, the development of the financial market seemed anything but promising for investors in funded pension plans (Pizzuto and Raitano 2022). The same holds for the minority of citizens having contributed to individual plans managed by financial institutions.

This incremental cutback of retirement provision has put new strain on the care-dependent elderly, not least because, over the last decades, the LTC system has developed less quickly than in other European jurisdictions (see Da Roit 2010; Gori 2019; Notarnicola et al. 2020). In Italy, public intervention in this area has long been rather limited, including with respect to residential care provision. In the country's 'family-based care regime', private caregiving has been – and still is – the dominant pattern although, in the new millennium, 'it seems more a social expectation than a voluntary decision of children themselves' (Melchiorre et al. 2022b: 2; 3). That said, given the creeping decline of the multigenerational family and the increasing number of elder Italians living alone, the development of formal care services has become a pressing concern in recent times. Against the backdrop of shrinking resources available for informal support (Da Roit 2010: 65), Italy has taken steps to boost formal care provision from the 1980s onwards. Up to the 2010s, public expenditure for the related infrastructure increased, and the coverage rate went up (albeit from a very low level, by international standards). There also were various attempts 'to enhance LTC quality' (Gori 2019: 2062), including the creation of multi-professional geriatric evaluation units and case management schemes. The most dynamic development in the new millennium has been the rise of privately arranged support networks including (often illegal) domestic work arrangements, at least for those in need of more demanding interventions.

Concerning non-familial support, the system established over the last decades is characterised by 'three parallel silos' (Gori 2019: 2061): direct payments, healthcare-related services and home help (including personal care in the sense discussed above). Up to present times, its core element consists of an unconditional and non-earmarked flat-rate benefit which targets individuals with a certified incapacity for moving around without permanent help or who cannot carry out basic daily activities. Administered at national level, this 'companionship allowance' (*Indennità di accompagnamento*, up to €500 per month) can be used to purchase (often low-skilled) domestic help, including 'live-ins' from developing countries (the so-called '*badante*', see below). The allowance can also be transferred to a private caregiver, although Italy has seen an incremental shift from informal family provision to paid care services overall – even though the bulk of formal care is delivered in the context of the aforementioned benefit scheme. In recent times, this shift has been endorsed by additional direct payments to frail older people at the regional level (especially in Central and Northern Italy), in order to curtail the demand for residential provision.

The professionalised home care sector saw a certain expansion until the late 2000s and stagnation thereafter. The predominant pattern remains services provided by regional units of the National Health System, with a focus on paramedical treatment and rehabilitation. This has been propelled by the ambition to avoid both unnecessary hospital admissions and more complex forms of long-term care dependency (Notarnicola et al. 2020). In this universe, services are provided by high-skilled professionals with a psychological, nursing or

social work background, engaged in activities such as prevention, diagnosis and therapy. They also comprise occasional treatments to people unable to see a general practitioner, paramedical assistance in the event of chronic or post-acute disabling conditions and domiciliary intervention under ‘Integrated Domiciliary Assistance Schemes’, in collaboration with municipal welfare departments (see below). Considering these activities, the last decades have certainly seen movements towards professionalisation in home care arrangements, at least in some parts of the country.

As for personal care, however, services have remained small-scale. In most places, non-familial support to home-dwelling older people with functional limitations is provided by privately hired (live-in) personal care assistants, sometimes alongside other forms of domestic support (Melchiorre et al. 2022a and b). Concerning the few publicly orchestrated personal care arrangements in contemporary Italy, responsibilities lie with municipal social service departments, which assess needs and run local support schemes. Co-payments may be charged. Such ‘domiciliary assistance services’ are used to support frail elderly people on a low income, by offering a few weekly hours of domestic help, transport services, companionship and support to prevent social distress (isolation). Service provision is incumbent on staff with low specialisation (educators, family mediators etc.).

Concerning recent trends in the universe for formal service provision, developments appear inconsistent. Conceptually, the modernisation of the LTC system has always been subject to a vibrant debate in Italian politics. An important impulse to developing more holistic forms of domiciliary support was the overhaul of the social care sector by a national reform enacted in 2000. This was aimed at overcoming the system’s fragmentation and pushing local authorities to set up an integrated infrastructure including a service for domiciliary home care (Citroni et al. 2016: 111). In this vein, some regions sought to develop partnerships with non-state organisations with the aim of adopting a mediating role or providing advice and orientation (Da Roit 2010: 116). During the last quarter of the twentieth century, numerous non-profit organisations became involved in publicly orchestrated contractual arrangements for social service provision (Gasparre and Bassoli 2020: 929). More recently, the idea of developing personal care arrangements outside of families has been embraced by local projects mobilising support from private (charitable) stakeholders and local sponsors (Madama et al. 2019). For instance, various neighbourhoods saw the emergence of local platforms aimed at facilitating the access to both formal and voluntary services, as well as the rise of community networks that organise supportive activities addressing vulnerable elderly people in their homes (including domestic visits and assistance with daily activities). These ‘socialization services’ (ibid: 133) have shown a potential to make home care provision more comprehensive and socially inclusive, bearing witness to a programmatic trend towards the defamiliarisation of elderly care in parts of Italy.

However, while ‘personal care underwent dramatic rescaling’ during the 1990s (Da Roit 2010: 72), support by formal domiciliary services remained modest in quantitative terms. Prior to the financial market crisis and the ensuing austerity politics, the LTC system became more diversified, yet it operated with a ‘very small presence of home care services’, with most interventions being confined to ‘very specific nursing and technical tasks’ (ibid: 67; 81). By the end of the 2010s, the situation had hardly changed, especially with respect to personal assistance beyond paramedical care (Melchiorre et al. 2022b).



Extant arrangements, including contracts with non-profit providers, have come to cover a limited number of visits per household – only 16 hours per year on average (Notarnicola et al. 2020). Although in some (Northern) regions, service supply has increased over the last years, access rates have remained low overall, with families seeking public assistance only in emergency situations. Privately managed solutions to support relatives in need of care have remained the dominant pattern overall. In fact, ‘the “real” pillar’ of Italy’s LTC system in the new millennium has been ‘the help provided by migrant care workers’ (Casanova et al. 2020: 2). Under the circumstances depicted above, this kind of non-familial domiciliary support has proved to be the most easily available (with up to 850 000 *badante* estimated to be actively engaged by the end of the 2010s). Public policies have come to foster this ‘Italian model of migrant personal care assistant(s)’ (Vianello 2023), including by an amnesty for undeclared immigrants and a special employment service devoted to them, with both measures being aimed at reducing the (huge) importance of undocumented care workers. For the (large) remainder, private caregiving by relatives has persisted as a widespread form of domiciliary support, including personal care in the above sense.

In the new millennium, established LTC programmes have been exposed to cost-containment strategies, with budgets cut in many places. Both regions and municipalities have shown a tendency to ‘decrease intensity in order to protect coverage’ (Gori 2019: 2073), to tighten means-testing for home help and to increase fees, thereby hitting disadvantaged households. Furthermore, municipalities, which have traditionally sought mutual accommodation with independent sector providers, have been found to devolve economic pressure upon the latter, including by a tough accreditation procedure and enhanced competition between providers (animated by public tenders etc.). A ‘separation between planning and execution’ (Gasparre and Bassoli 2020: 945) has added to the entrenched ‘lack of integration’ (Casanova et al. 2020: 1) within the entire universe of social and medical services. Various regions have introduced tools of managerial governance (outsourcing, contracts with non-state providers, lump sum payments to hospitals) into the LTC system and its environment, which tend to induce greater fragmentation within the wider human service infrastructure for elderly people (Bifulco and Neri 2022). While EU funds have contributed in some places to sustain local projects, access to publicly orchestrated domiciliary services has become altogether more difficult in recent years. Households from better socioeconomic backgrounds continue to hire low-skilled domestic workers (both legally and illegally), even as LTC policies and the wider public tend to consider privately paid assistants (including under the ‘live-in’ model) as a panacea to deal with the looming care crisis (Melchiorre et al. 2022a). Inconsistencies inherent in such personal care arrangements, among which an ‘overlap of functions between personal care assistance and household assistance’ (Da Roit 2010: 69) seem to be widely accepted – as are the interrupted timelines endemic to these arrangements which often clash with the users’ ‘times of private life’ (Vianello 2023: 337). Potential implications include unsustainable private solutions and the ‘growth in inappropriate care’ (Gori 2019: 2078) more generally.

Quintessentially, the above country sections illustrate that, regarding safe living conditions during later life and in the event of care dependency, twenty-first century Europe exhibits considerable variety concerning the role of non-familial personal care. However, a pan-European perspective on the evolving landscapes of welfare provision in this overall area reveals both a ‘surprising degree of uniformity in the historical origins of the state’s role in social care’

as well as a growing political interest in publicly orchestrated service frameworks – notwithstanding that, in most jurisdictions, the respective support has remained a ‘selective assistance to families’ (Anttonen et al. 2003: 171; 178; see also Barczyk and Kredle 2019). In many places, domiciliary support has taken shape as an arrangement in which professional services provided in the users’ home complement informal caregiving arrangements in families and in the community, given that formalised personal care (in the above sense) is available only for short time slots, which may include interventions during the day or several times a week.

Recent transformations prove inconsistent. On the one hand, the country sections above indicate a creeping tendency towards the ‘institutional enrichment’ of home care packages by person-centred services that go beyond nursing and bodily care. While non-paramedical activities in related arrangements often concentrate on housekeeping and ‘technical’ assistance, more holistic forms of personal assistance have become an explicit element of these care packages in various parts of Western Europe, with ‘relational work’ (Vänje and Sjöberg Forssberg 2021: 3) being increasingly viewed as endemic to professional care activities. Even where domiciliary provision has remained small-scale and difficult to obtain over longer periods (e.g., in Italy), programmatic intentions to establish more comprehensive forms of elderly care are palpable. Hence, internationally, recent institutional change has made LTC arrangements more inclusive at least in conceptual terms. In the same vein, the pension systems established during the twentieth century have made part of the elderly population more solvent in situations where non-familial support is needed.

On the other hand, shifts in the regulation of domiciliary support have impeded the provision of personal care from developing further. Given that the expansion of LTC systems is far from entailing free care for all, policies prone to curtailing the level of retirement provision or putting it at greater risk reduce opportunities for receiving appropriate personal care services in various ways. Thus, in the early 2020s, even the most generous welfare arrangements in this area comprise co-payments for users (see the case of Norway). The programmes established in Germany and England only cover part of the costs related to elderly care while Italian households receive only rudimentary professional support. Thus, in the new millennium, reduced retirement provision entails limitations concerning the purchase of support services. Moreover, throughout the four countries considered above, state-regulated and publicly funded care services have been reorganised in ways susceptible to causing disruption, fragmentation and lack of transparency (Bode 2017a). In various places, cost reduction policies have often diminished the quality of publicly funded services, curtailed the amount of services available per care recipient or prompted the use of a low-skilled workforce, with this causing rapid staff turnover and constant stress on caregivers. In part, this is due to formal care provision having become (re)organised according to a quasi-market model featuring direct payments to users or a more or less systematic purchaser–provider split. Where service landscapes consist of free-standing competitors, access to personal care depends on a chance encounter with business-like providers which, while resorting to sophisticated promotional materials to attract lucrative clients, may not always deliver on promise. The related ‘marketization by default’ (Leibetseder et al. 2017: 144) becomes most salient when frail citizens and their families, seeking to replace or complement private caregiving, are led to buy weakly regulated services, whether provided by commercial businesses, non-profit providers under strong economic pressure, or immigrants involved in (often pre-modern) domestic work arrangements. In this context, the private burden of arranging appropriate forms of personal care may be high. Overall, it seems that

‘home-based services have fallen short of the expectation that they could support “ageing in place” on a grand scale’ (Kröger and Bagnato 2017: 209). Rather, the prospect of ‘care poverty’ is a reality for many European citizens when growing older (Kröger 2022). This may apply to Nordic countries to a lesser extent, yet the LTC systems of these nations have seen profound institutional change as well, with the holistic orientation – inherent in these systems from quite early on – becoming less consistent. Hence, even in societies in which non-familial and non-paramedical forms of professional support appear well-entrenched, domiciliary services may not produce what (future) care-dependent citizens expect – namely, punctuality, reliability and continuity of care (see Pollock et al. 2021). Seen from this angle, later life is about to become less safe for a good deal of the West European population.

## 10. Six lessons to learn: evolving institutional arrangements and inconsistent change

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At the end of this third book section, the diverse observations delineated thus far are recapitulated with two ambitions. First, in the light of the mechanisms through which the devices of modern welfare states influence the well-being of their citizens (rules, policies and reform agendas, contextual social change), it is possible to make overarching claims about directions of change concerning the institutional design of welfare arrangements throughout Western Europe in recent times. The developments portrayed throughout are read through the lens of the analytical grid presented in the Chapter 2, which enables us to characterise relevant dynamics in more abstract terms. For each (sub)field under study above, key principles of social modernity are put to a ‘test’ regarding their role in the evolving regulatory frameworks examined throughout. Secondly, based on reflections about the (approximate) effects of these dynamics, this overall recapitulation feeds into an overarching interpretation of the above observations in terms of progress and setbacks, as well as of achievements and divisions. While identified dynamics of change are certainly sector-specific, the (sub)fields explored in greater detail exhibit important commonalities nonetheless. Hence an all-embracing synthesis of the developments under study is highly informative when it comes to understanding dynamics of contemporary democratic capitalism and exploring the fate of social modernity.

### 10.1 CHILD PROTECTION AND EARLY EMPOWERMENT: BIASED INVESTMENT IN YOUNGSTERS

From a bird’s eye view, the development of child welfare services over the last decades suggests that European societies still stick to the agenda of social modernisation. With regard to children, these societies continue to respect human dignity and empower people regardless of what a given individual person contributes (or will contribute) to a nation’s well-being – which refers to the first dimension of this book’s analytical grid. Internationally, an increased awareness of children’s general vulnerability aligns with strong commitments to make childhood safe(r) and to ensure that children can grow up without physical and mental harm. This is a universalistic orientation, in the sense of regulatory frameworks containing guarantees for the benefit of all children, including those ‘at risk’. Because young people are not involved in the productive system of Western societies, it seems natural that these societies would pursue these types of protections for children. With the general ban on child labour, these people’s capacity to participate in this system is low, at least until they become a teenager. However, when conceived of as belonging to the realm of family policies, regulatory frameworks in the child welfare field are not completely detached from questions related to human effort and work performance. It seems that the more these frameworks affect the living conditions of parents, the more relevant appears the interface between extant welfare programmes and

the world of productive work. Publicly orchestrated child care and child welfare programmes (such as family counselling services) have a potential to relieve citizens from the pressures related to their parenting role (in terms of time, money, worries) and the way the latter intersects with other responsibilities. From this angle, the fact that, during the last decades, the access to institutionalised support has been facilitated for larger sections of the young(est) generation is an expression of a growing acknowledgment of human dignity in this particular ambit, not least because this support is partially decoupled from economic merit on the parent side.

Correspondingly, welfare arrangements in this area honour human effort regardless of the (current) market value of the individuals they target (which is related to the second element of the analytical grid used to characterise such arrangements in this book). In advanced Western welfare states, children are widely decommodified, with no market value attached to them in general terms. Rather, they are assumed to invest in actively discovering the world around them. Moreover, social justice values (in the sense delineated in Chapter 2) are invoked when it comes to parents and their capacity to sustain their offspring. The above assessment of recent child-related welfare programmes in Western Europe, and their development over the last decades, suggests that there have been new efforts to foster this very capacity, whatever a family's relative (market) position in the wider economy. Internationally, this movement is epitomised by the social investment agenda with its (more or less) explicit emphasis on the promotion of disadvantaged families and children. It is also reflected by initiatives with a potential to enhance the capacity of publicly funded service facilities with a remit to cater for the young(est) generation. In the new millennium, related policies have often addressed all sections of the European population, most prominently in the area of early childcare and after-school clubs. Arguably, welfare programmes in this area are susceptible to reducing toxic stress experienced by private caregivers and may also alleviate some of the worst conditions of poverty. Moreover, from the 1970s onwards, various welfare organisations have become entrusted with social interventions aimed at containing adverse parenting – notwithstanding that the respective efforts vary considerably across Western Europe. Among other things, the established devices enable activities to rehabilitate families and their educational role, or to develop alternative care arrangements.

In addition, the above programmes partially lend themselves to fostering personal self-direction (the third element of the grid). Internationally, this mission is, first of all, corroborated by devices aimed at protecting children from mental and physical harm. Western European nations have seen efforts to amplify relevant policy frameworks over the last decades. Other frameworks provide the young(est) generation with resources that help with developing a normal life course and offer children and their parents some individual autonomy when making related decisions. This especially pertains to family allowances and rights to parental leave, both on an upward trajectory throughout twenty-first century Europe. In many parts of the latter, moreover, welfare states have set up and improved publicly regulated services amenable to an empowering childhood – at least with regard to basic requirements of modern socialisation. It stands to reason that both extended childcare and family welfare services can facilitate the lives of parents when they help young individuals to grow up according to personal preferences, particularly when programmes are dedicated to imparting skills to disadvantaged children and their legal guardians (in the event of learning difficulties, for instance). Hence a first lesson to be inferred from the analysis in this book section is that,

during the last decades, the vision of social modernity has become more influential in various respects when regarding the lives of children and their families.

Concerning this general assertion, important qualifications apply, however. To begin with, the respective institutional commitments have limitations insofar as public programmes – including family welfare services – only partially address the circumstances under which children are growing up in modern times. Contemporary democratic capitalism continues to tolerate poor living conditions for many parents, despite a large range of policies aimed at improving their employability and extending opportunities for non-familial childcare. In recent times, many children have been hit by the misery of their families, translating into an upsurge of child poverty over the last decades (Cantillon et al. 2017; Bradshaw and Nieuwenhuis 2021). Concomitantly, the last decades have seen an increasing gap between effective efforts and actual needs concerning the empowerment of young people (and their parents). Hence collective orientations related to human dignity reach limits here. As for the social investment agenda that has inspired major public policies in Western Europe since the onset of the twenty-first century, inconsistencies are palpable as well. The agenda has spawned a rising expenditure for child and family services including educational institutions – but the respective public effort has often prioritised activities expected to increase the future economic impact or ‘market value’ of typical target groups. This ‘welfare utilitarianism’, at odds with the idea of social justice, finds its concrete expression in the fact that (more or less prevalent) efforts to boost certain forms of public education clash with the living conditions of parents exposed to situations of poverty and despair which arguably complicate processes of ‘private learning’ (van Vliet and Wang 2015; Postan-Aizik and Strier 2020). Obviously, (alleged) future contributions to national wealth and the (labour) market have a significant bearing here. At the same time, the social deprivation of parents is widely viewed as a major reason for the growing caseload reported from all child protection systems (Parton 2020). The administrative capacity of these systems has not kept pace with the exacerbated challenges, hence a tendency towards ration(alis)ing social interventions throughout this field, with reduced efforts per case in many places. Concomitantly, public policies have shown a tendency to concentrate on the ‘perfect’ response to ‘evidenced’ child maltreatment. Management reforms have put a growing burden on those who orchestrate or provide child and family welfare services. To gauge the reforms’ precise implications, we certainly need a more thorough analysis of organisational practice and experience (see book Part IV), yet the studies referred to above suggest that this dimension of regulatory change should not be overlooked when evaluating child and family welfare systems.

In addition, current welfare programmes geared towards promoting disadvantaged children have side-effects that equally delimit their effectivity in terms of empowerment. Thus, the widespread concentration of child protection systems on acute risks may eventually lower the chances of growing up in an empowering context – that is, with more ambitious social interventions that (would) help them to build their own future. Moreover, to the extent that new ‘risk-oriented’ approaches to combating child neglect and maltreatment contain repressive elements, social intervention performed for the sake of a youngster’s well-being may reduce his or her parents’ educational capacity (further). True, concerning maltreated children, much depends on the availability and quality of alternative parenting arrangements, for instance, in foster care or in residential settings (in the event of a child placement). However, prior to such measures and episodes of child neglect, the treatment of at-risk families by the welfare state

often creates barriers to empowerment, as suspicious monitoring activities and paternalistic control of those families may cause stress for parents and their children in ways detrimental to the latter's personal development. In this sense, concerning effects on beneficiaries, past policies have reduced the scope for living self-directed lives and individual autonomy. All this leads us to a second overall lesson from our summary analysis of changes in the regulation of childhood-related welfare arrangements across Western Europe: in the new millennium, part of the ambitious projects seeking to empower the young(er) generation appear as a biased investment into child welfare, given that, when regarding the situation of relevant target groups, relevant policies have been associated with dynamics of disempowerment.

## 10.2 EMPLOYMENT PROTECTION AND THE (RE-)INTEGRATION INTO DECENT WORK: EQUIVOCAL POLICIES WITH IMPORTANT PITFALLS

The welfare settlement in twenty-first century Western Europe contains diversified provisions to protect the wider labour force and (re-)integrate jobseekers into gainful employment. Many of these provisions have a potential to provide opportunities to access and preserve decent work. To some extent, they signal societal respect for human dignity given related support is often available regardless of what beneficiaries (have) contribute(d) to society in terms of personal effort and performance. In part, related welfare programmes have become even more vigorous over the last decades. This leads us to a third lesson from the enquiry above: while, in democratic capitalism, the 'power play' of market forces constantly produces distortions that exclude many citizens from decent work arrangements, European welfare states have shown ambitions to contain or repair related damages and thereby echo expectations inherent in the vision of social modernity. Relatedly, they have developed (more or less) comprehensive employment protection frameworks which often include minimum wages or minimum income schemes – with all this making a clear difference to earlier periods of Western capitalism.

In particular, extant devices signal a common will of European societies to combat social exclusion or alleviate its material consequences in tune with basic humanistic values. Since the 1990s, the respective commitment has translated into programmes geared towards extending the access of 'troubled' populations to employment services which (under certain conditions) may help long-term jobseekers quit situations of 'welfare dependency' and develop skills (further). In a similar vein, health-related rehabilitation, while being aimed at restoring human capital (also in the interest of employers), has come to focus on personal needs and respond to tragic strokes of fate in more holistic ways. Like modern healthcare more generally, it is often fuelled by ambitions 'to heal humankind' (Gaffney 2018) and offer medical treatment to anyone (Ooms and Hammonds 2020), notwithstanding international differences in administrative models, the magnitude of private co-payments, or the quantity or quality of service supply (Wendt 2019). These ambitions reached a new apex with the outbreak of the Covid-19 crisis in 2020 and the strong cross-national commitments to saving human lives and protecting the most vulnerable (Moreira and Béland 2022).

Using the terms of the analytical grid presented earlier in this book, various devices related to the regulation of waged labour also continue to honour human effort irrespective of the (current) market value of a given individual. Thus, employment protection in the event of sickness and work incapacity has become taken-for-granted internationally, including support

for workers on a low income and with modest payroll contributions (to social insurance schemes or the public purse). Moreover, when taking functional equivalents into account, and glossing over discrepancies in generosity, European welfare states of the new millennium have maintained a basic feature of the social model established during the twentieth century, namely income protection in the event of temporary inability to work. For the overwhelming part of the salaried population, the absence from work does not entail a severe welfare loss unless it lasts a long time. Also, institutionalised safety nets have come to cover non-salaried citizens (including informal caregivers and the self-employed) in most parts of Western Europe. Overall, then, concerning the mere access to schemes providing subsistence on the way back to gainful employment, a worker's 'market value' remains irrelevant.

To some extent, extant frameworks also foster personal self-direction when it comes to crafting a work career. Thus, larger sections of the European population continue to enjoy some latitude in shaping this dimension of their life course. More specifically, when comparing earlier episodes of industrial societies with the period between the 1980s and early 2020s, it is obvious that European welfare states have become more engaged with organising interactive support to citizens burdened by a disrupted employment trajectory. Concerning work (re-)integration, active inclusion schemes have addressed people who otherwise might have been left behind. Some programmes have opened in-work progression routes to jobseekers, others have been found to improve basic life prospects, such as by improving health and increasing self-esteem (see e.g., Nyssens 2006; Puig-Barrachina et al. 2020). Likewise, the development of contemporary rehabilitation systems, which – at least conceptually – mirrors the emergence of a more comprehensive 'health strategy' (Stucki et al. 2018) throughout post-industrial welfare states, comes with a strong potential to strengthen an incapacitated person's ability to take self-directed decisions in her or his subsequent life course – and significantly more so than during the first stages of industrial modernity.

However, all these movements come with important pitfalls – which points to a fourth lesson to be drawn from the investigation above. The promise of decent work for all, while being a core element of the vision of social modernity, has often not been a central reference of those reforms that Western European welfare states have undertaken since the 1980s, especially in the area of employment protection and job promotion. At least, institutional change in this area reflects an equivocal agenda materialising in 'ambivalent labour market policies' (see Ahn and Kazepov 2022, dealing with Austria) and half-hearted efforts to make organised work (re-)integration effective in the sense of providing and preserving decent work for target groups regardless of what the latter (will) contribute, or have previously contributed, to national wealth. Related public efforts have been unstable and ambivalent concerning underlying motivations and strategies. In all jurisdictions studied in this book section, needs for (interactive) support in this area have grown faster than the available capacities, even as job promotion schemes have frequently failed to alter the living conditions of major target groups in substantial ways. Elsewhere, notably in Mediterranean countries, efforts in this area have grown only within the confines of volatile and fixed-term EU programmes. Internationally, many work (re-)integration programmes have often trapped jobseekers in low-status positions, leaving participants with 'fewer ways to insist on their dignity' (Wilcoxson and Moore 2020: 33). Consequently, in the new millennium, public support geared towards providing all citizens with a decent job – regardless of what they have previously contributed, or will contribute, to national wealth – has remained limited in scope and ambition.



Concomitantly, reforms passed during the last decades have reduced the propensity of welfare states to honour human effort regardless of an individual's (current) market value. While the experience of unemployment or precarious work contracts have mushroomed almost everywhere in Western Europe, amendments to major regulatory frameworks have done little to counterbalance a movement that has come with enhanced commodification and less protection from market forces. Even though related trends have varied in scope and depth across Europe (Greve 2020), many citizens have become exposed to situations in which their 'market value' becomes more critical to their future work trajectory and personal wealth. This trend, which runs counter to entrenched understandings of social justice, has made itself felt by a more restricted access to decent unemployment compensation, along with greater legal pressures to take up gainful work according to what 'markets' (and employers therein) have 'on offer' in terms of occupational profile, working time arrangement, salary and location of jobs.

Pressures have also grown because, since the 1990s, reforms have facilitated dismissals and temporary work contracts throughout Western Europe (with only minor protective amendments in more recent years). True, this marketisation of human capital is often judged as being part of a progressive policy agenda. Proponents argue that it might boost economic growth to the advantage of everyone and promote labour market outsiders, including the use of 'activation' policies and 'welfare-to-work' programmes. General or vocational (re-)training, fostering human capital building, is expected to help beneficiaries find jobs that alternatively would either remain vacant (in the case of labour shortage) or be given to less disadvantaged candidates (Brown and Koettl 2015: 20–21). Consequently, such measures are often viewed as precipitating a redistribution of otherwise unchanged labour market risks among the active population – which has been the generic rationale underlying the European Union's active inclusion strategy of the 2010s (Eichhorst et al. 2017; Marchal and van Mechelen 2017; Agostini and Natali 2018). However, it seems that the long-standing mantra of deregulation and 'flexicurity' – defended by orthodox economists, mainstream political forces and centre-left leaning academics alike – has overall been belied by its actual ramifications (Hipp 2016; Piasna and Myant 2017; Sarkar 2020). Thus, reduced unemployment compensation has been found to often be harmful to a jobseeker's employability, given the stress caused by a life in poverty. Conversely, jobless people often fare better in terms of well-being and mental health in countries with more generous benefit schemes (Kamerāde and Bennett 2018). Furthermore, reforms inspired by the aforementioned deregulation agenda 'have turned out to largely fail at the goal of integrating job-seekers into the labour market while, at the same time, exerting only limited influence for combating unemployment' (Barbieri and Cutuli 2016: 510). Thus, as Gebel and Gieseke (2016) have illustrated, facilitating temporary contracts has frequently increased employment risks of outsiders (precarious young workers) without necessarily curbing unemployment in this population.

In the field of health-related rehabilitation, developments appear 'contradictory' as well (Harsløf et al. 2019a: 6). Since their early days, rehabilitative services have often concentrated on easy-to-cure patients, particularly those with a greater chance of benefiting from work-related support (including vocational training). This bias persists in many places even as welfare state entitlements have not kept pace with evolving needs, given an ageing population, rising rates of co-morbidity and the increase of non-communicable diseases – that is, an increased number of 'people living with limitations in functioning' (Stucki et al. 2018: 312). This is consonant with studies about the recent development of healthcare in general

(see Stuckler et al. 2017, Böhm 2019: 151–5; Bifulco and Neri 2022; Krachler et al. 2022). As Greve (2020, chapter 8) has shown, once outlays are weighed against assumed needs per person (that grow with population ageing), healthcare expenditure decreased in the years prior to the outbreak of the Covid-19 pandemic, along with a surge of out-of-pocket payments and a reorganisation of the healthcare infrastructure. This movement sits uneasily with progressive modern values and abets new social divisions as well as greater discrepancy concerning the way patients access or receive services (see Collyer and Willis 2020, or Lapidus 2019, for the case of Sweden).

Finally, revisions of work-related regulatory frameworks over the last decades have set limits to personal self-direction when it comes to finding and preserving decent employment. This follows from the aforementioned restructuring of employment protection frameworks but also from the design of active inclusion policies, which have been increasingly imbued with a welfare-to-work logic internationally. Work (re-)integration schemes influenced by this logic have often given preference to imposed measures of which many have proved to be futile and amenable to ‘revolving-door’ dynamics, preparing their target groups for entering (again) into low-waged, short-term or casual jobs. The schemes invite or urge jobcentre agencies to ‘control’ their clientele (via sanctions) and thereby confine zones for self-determination (e.g., Nunn and Morgan 2020). With the international turn towards ‘workfareist’ policies from the 1990s onwards, they have equally shown a built-in propensity to discipline and intimidate people (Fletcher and Wright 2017; Betzelt and Bode 2017; McGann 2023), particularly in a context where unemployment compensation is highly conditional and ‘choosey’ job search is seen as illegitimate. This also pertains to workers in ‘bad shape’ who, via active inclusion policies, are urged to accept proposed jobs in the ‘sheltered’ or deregulated post-industrial labour market. Far and wide, job promotion measures are short-term and often concentrate on marketing and matching extant skills rather than developing new ones, and this system is susceptible to delimiting integration effects for many users who are ‘moving from activation into short-term employment, and then back into unemployment, eventually repeating their participation in activation’ (Lindsay 2010: 129, for the case of the UK). Many ‘welfare-to-work’ schemes have churned jobseekers in and out of precarious (sometimes subsidised) jobs and have created lock-in dynamics (e.g., entrapment in temporary work careers) – which implies that disadvantaged citizens end up in a second-class working life (Dostal 2008; Perkins 2008; Brown and Koettle 2015; Considine and O’Sullivan 2015; McGann et al. 2019). More generally, employment protection frameworks in the new millennium tend to enforce pre-determined back-to-work trajectories (see Koenig et al. 2019). As the overhaul of such frameworks has entailed reduced income replacement in many cases, citizens with low ‘labour market value’ have come to enjoy less latitude concerning their job choice. Put in a nutshell: the devices created or rearranged during the last decades often restrict the autonomy of major target groups when it comes to shaping a life course in a purposeful way.

### 10.3 SUPPORT FOR A SAFE LATER LIFE: TOWARDS EXTENDED BUT MORE UNBALANCED WELFARE ARRANGEMENTS

Concerning those arrangements that welfare states have instigated for the organisation of later life, the preceding analysis was focused on programmes for personal (domiciliary) care deliv-

ered to frail elderly people in the context of ‘surrounding’ regulatory frameworks, including retirement schemes and long-term care provision more broadly. This analysis brought to the fore that personal care, understood as a service package containing non-paramedical activities of domiciliary support, has developed as a (more or less) novel add-on in long-term care (LTC) systems, with a potential to improve the prospect of carefree (or cared-for) dependency during old age. To the extent that twenty-first century welfare states endorse this prospect for the benefit of all elderly people, they arguably respect their human dignity regardless of what they contribute, or did contribute, to society in terms of individual effort and performance. Both the expansion of collectively guaranteed (basic) retirement provision throughout the twentieth century and, more recently, the building of more encompassing LTC schemes (whether funded by the taxpayer or via social insurance schemes) have been essential preconditions for the above principle to matter. Ideas contained in the vision of social modernity seem to have exerted some influence on related welfare state frameworks, although they are fraught with inconsistencies in many places.

Arguably, the recent history of old age provision in Western Europe has spawned a set of devices that also contribute to honouring human effort regardless of the (past and current) market value of elderly people (albeit to a varying extent). Thus, several welfare programmes – while providing benefits in accordance with past achievements in the labour market or revenue emanating from long-term saving activities – comprise elements that partially draw on the citizen’s wage model (Myles 1984). According to this model, any human effort during the life course (e.g., as a soldier, a caregiver, a volunteer, an independent worker) induces entitlements to retirement income. To some extent, contemporary European welfare states conform to this model as they have come to include benefits and services for later life which are granted independently of what beneficiaries have contributed to a given collectivity. Even though reforms from the 1980s onwards have made differences in earlier market value (reflected by earned salaries or capital investments) more relevant to the level of retirement provision, LTC programmes created during the last decades relieve families (or private networks) from (part of) the ‘burden’ to cater for frail elderly relatives or friends. Concomitantly, the well-being of retirees becomes decoupled from the market position of their loved-ones. Hence, compared with the early days of Western welfare states, the ‘care burden’ is currently socialised to a much higher degree, which accords well with considerations of social justice when it comes to the organisation of old age in current Western European societies.

Furthermore, some of the changes made in related regulatory frameworks have enlarged the scope for personal self-direction among frail elderly people. Just as any institutional ‘context with a strong welfare provision based on individual rights tends to empower the elderly and to offer choices’ (Da Roit 2010: 111, referring to Dutch LTC system), so does the extension of entitlements to monetary, social and health-related support in later life have the potential to help elderly people cope with care-dependency and economic risks more generally. While international differences have remained considerable concerning such entitlements, the respective opportunities seem to have grown from the 1980s onwards. For larger sections of the Western European population, access to pension income has been extended (although payments remain modest for numerous retirees); concomitantly, the building or expansion of LTC systems has been on the policy agenda for some time now. This remains the case even in a country such as Italy where institutional efforts to develop formal care services have been more modest in comparative terms. True, concerning the likelihood of carefree dependency,

much depends on other factors such as the availability of informal caregivers as well as living conditions and personal orientations. However, notwithstanding important international differences, commitments to give older people greater choice – for instance, between residential and non-residential care provision – as well as efforts to professionalise personal support in domiciliary contexts have become palpable in the new millennium. These observations underpin a fifth lesson drawn from the analysis above, namely that state-regulated old-age provision has grown into a major backbone of democratic capitalism, materialising in a robust generational welfare contract under public responsibility and indicating a strong(er) influence of progressive modern values (human dignity, social justice, individual autonomy). Related devices established during the twentieth century have persisted far and wide, and some of them have even become more sensitive to the wider range of needs of frail elderly people.

Again, however, recent trends have been inconsistent and are indicative of more unbalanced welfare arrangements concerning the protection of old age. Thus, for many Europeans, pension reforms launched in the new millennium have made retirement income less secure and also less generous (see Vlachantoni 2022), which exposes elderly people to greater risks of social deprivation. Accordingly, collective support provided to them without considering tangible (past) contributions to society is shrinking in relative terms. Moreover, people's intangible life efforts have come to be less honoured in principle. In most countries, pension systems have become less redistributive over the last decades, meaning that, in the new millennium, the record of previous contributions to insurance or saving schemes is more critical to the level of retirement provision than was the case in earlier times (the 1970s and 1980s). Concurrently, a growing part of pension wealth depends on the market success of funded savings plans that various European governments have promoted by extended tax-breaks or direct subsidies to savers. To the extent that retirement income is contingent on the traded value of a given capital investment, past human effort may turn out to be less relevant for an individual's pension wealth in later life. A similar logic is endemic to private LTC insurance plans that are proliferating Europe-wide. Hence, insofar as private income is needed to (co-) pay for personal care (including assistance other than that which comes from nursing and mere housekeeping services), the access to related services has become more contingent on market dynamics. In some countries, furthermore, changes to public LTC schemes have put a greater onus on families (or friends) as sources of private help. When they are unavailable, care recipients must spend their citizen's wage – or 'deferred' labour income and saving plan profits – on the satisfaction of care needs. In this case, the current 'market value' attached to human capital matters greatly. Granted, care-dependency is associated with various imponderables – for instance the orientations of spouses, children and further informal caregivers. In this respect, social risks are not necessarily distributed across market positions or class lines (see Chapter 5). Nevertheless, positions achieved by a caregiver on the (labour) market may play a critical role, as his or her economic situation impacts upon options to reduce work commitments or even quit a job for a while – or, alternatively, to assist elderly people in buying domiciliary support from professional service providers.

In the same vein, institutional change in this universe has induced new constraints that make personal self-direction in later life more difficult to achieve in many instances. This is most obvious for people faced by pension insecurity and cuts in future retirement provision, as certain care services may be inaccessible for pensioners on a low retirement income. The potential for self-direction is also affected by the marketisation of elderly care frameworks

over the last decades. While this offers some (better-skilled) sections of the European population greater choice and new options for shaping their silver age in autonomous ways, market-driven provision often comes at the price of enhanced opacity concerning the terms of service provision, along with higher risk of poor quality in a fragmented domiciliary care sector. Under such circumstances, individual options for influencing care processes turn out to be curtailed. Hence a final lesson from the analysis undertaken thus far is that, in important respects, the promise of a safe old age has become less wide-reaching and less reliable in twenty-first century Europe, especially for lower-class citizens and those hit by stronger care-dependency.

#### 10.4 A CROSS-SECTORAL VIEW: PROGRESS AND SETBACKS, ACHIEVEMENTS AND DIVISIONS

Given the ‘mixed bag’ of evidence recapitulated thus far, where do we stand now concerning the ‘promise’ of social modernity and its translation into welfare arrangements across Western Europe? Do recent trends in the regulation of organised welfare provision signal human progress, or are they indicative of setbacks regarding the above promise? The analysis in this book section, pointing to general directions of change concerning relevant regulatory frameworks in Western European welfare states over the last (four) decades, overall suggests that past trends have been inconsistent. In many respects, the recent development of programmes addressing child welfare issues, employment protection (*writ large*) and old-age provision imply continuity in terms of social modernisation as various achievements attained during the twentieth century have persisted into the new millennium. When taking the principles of social modernity (according to the grid presented in Subsection 2.3) as a yardstick, one can even identify some advancements in the welfare sectors under study, with new responses to the challenge of finding socially balanced agreements between relevant constituencies. Hence, human progress has not been wiped out.

Thus, the potential for empowering young people is remarkable in the new millennium. Internationally, commitments to universalistic education have become stronger overall, most prominently during early childhood, with related services receiving a strong boost since the turn of the millennium. Over the last decades, family policies have come to address larger sections of Europe’s offspring (compared with earlier times). Extended early childcare and education facilities have a potential to improve opportunities for young citizens to craft their life course according to the modern concept of (considerate) individual autonomy (in the sense delineated in Chapter 2), including for less affluent families and their children. Technological change, a society-wide quest for higher skills and movements of cultural change (including a new gender model) have all pushed this collective investment into public education. In particular, the relative growth of the academic middle class seems to undergird this commitment to promoting human development during childhood. The same mechanism can be assumed to entail stricter regulations for the child protection endeavour, given ambitions to optimise social interventions in this field and less tolerance of harm inflicted upon the life of the young. Concerning subsequent stages of the life course, the vision of decent work for all has equally remained on the public agenda, with this reflecting a certain robustness of entrenched norms of social justice. Extant regulatory frameworks continue to have a decommodifying effect on human labour since job protection rules and income replacement schemes have persisted

throughout many parts of the capitalistic economy and in the public sector (though losing ground elsewhere, see below). To the extent that citizens have become, or remain, entitled to the above schemes, the containment of the marketplace is still effective – at least when comparing the situation of the twenty-first century to the earliest periods of modern capitalism. In the new millennium, buoyant labour markets have created favourable conditions for the better-educated salaried (middle class) workforce throughout the wealthier regions of twenty-first century Europe, with an increased scope for self-determined career choices as a result. Concerning other sections of the waged population, the last decades have seen cross-national efforts to address labour market hardship, notably by establishing active inclusion schemes as well as a nexus between monetary and practical support. More generally, institutionalised income replacement for jobseekers has remained a big issue on the social policy agenda internationally, with experts and political actors pushing for the introduction of a common unemployment benefit scheme at EU level (for many, see Kuhn et al. 2020). In the slipstream of healthcare universalism, moreover, rehabilitation services have become available to a growing number of users over the last decades in most European countries – which equally signals a basic consensus for supporting people who struggle against the blows of fate. Likewise, the institutionalisation of retirement provision achieved during the twentieth century has not been questioned. Current regulatory frameworks still organise collective risk-sharing and ensure a minimum level of pension security. In some places, there has been a renewed interest in protecting at-risk groups against social deprivation in later life, for instance by initiatives to extend minimum and non-state pensions. In addition, most European welfare states have seen an expansion of LTC services over the last decades, with emancipatory gerontological concepts becoming more influential overall. The very agenda of ‘ageing in place’ has left deep traces in the architecture of old-age provision and related welfare sectors internationally. Thus, in the early twenty-first century, a good deal of the Western European population can (still) aspire to enjoy a carefree silver age (in material terms) – which, through the analytical lens adopted for the analysis undertaken here, indicates the consolidation of past achievements, for which the ground was laid during the twentieth century. From this vantage point, recent institutional change has not undermined the process of social modernisation set off in the early days of democratic capitalism.

However, setbacks are obvious. To begin with, Western welfare states have seen increasing pressures to contain socialised efforts for ensuring old-age related welfare arrangements. The vision of a safe later life, enshrined in the promise of social modernity, has been hit by strong counter-movements, given the widespread cuts to (public) retirement provision (in relative terms), growing pension insecurity and numerous Europeans facing the risk of impoverishment when becoming old (Hinrichs 2021). Internationally, pension reforms, the volatility of financial markets and the transition to post-industrial labour markets have combined to drive up the poverty rate among elderly people as early as the 2000s, even in more egalitarian welfare states such as Sweden (Therborn 2020). Exacerbated social divisions are likely to occur under these conditions. Likewise, the reluctance of (many) European welfare states to meet the rapidly growing LTC needs in more comprehensive ways can have dramatic consequences for low-income households. This may occur especially against the backdrop of scarce resources for private caregiving due to both ever more demanding labour markets and the socio-cultural implications of the more emancipatory gender model established in advanced Western societies. Further restrictions reside in the proliferation of lean adminis-

tration approaches throughout the elderly care sector and the ensuing rationalisation within care-providing welfare organisations (see Chapter 14). In a similar vein, employment protection frameworks have seen setbacks that have huge consequences in terms of citizens' access to decent work. Starting during the 1980s, both the partial curtailment of these frameworks and the deregulation of labour law in most parts of Europe have reduced the protection against both unleashed market forces and labour-unfriendly corporate policies across larger sections of the economy. While twenty-first century social policies cherish holders of 'market-ready' human capital, they provoke involuntary job flexibility and low salaries on the side of those with limited bargaining power. Despite some amendments in recent years, this latter group has been subject to a movement of 're-commodification' which tends to delimit the scope for work-related self-determination and sometimes even the respect of human dignity (especially with regard to welfare bureaucracies and benefit claimants). Reforms have also partially undermined the potential of active inclusion schemes which, in many cases, do not give a way (back) to in-work progression routes because of budget cuts, short-termism in the design of programmes, and lean management approaches proliferating across both welfare bureaucracies and provider organisations. Likewise, the general commitment of Western European societies to ensure an empowering childhood clash with policies contributing to the reproduction or even reinforcement of long-standing social cleavages, with many youngsters left behind. In most European countries, there is a gulf between the demand and supply side concerning the access to early childhood education and childcare, as well as 'soft' child protection services. Under such circumstances, the twenty-first century welfare settlement tends to benefit (upper) middle-class milieus to a greater degree than families from the lower strata of the population.

Altogether, when taking stock of institutional developments in Western European welfare states over the last decades and across the three life course stages under scrutiny here, the glass seems more half empty than half full in terms of human progress. True, the analysis in this book section lends credit to the suggestion that the vision of social modernity has not ceased to produce effects – given that entrenched emancipatory arrangements have 'survived' (up to the early 2020s) and some of the orientations contained in recent reform movements reflect commitments to develop these arrangements further, especially those that affect income safety nets and certain publicly governed human services. However, while the chapters above did not embark on a fine-grained investigation into the magnitude and precise social impact of past regulatory developments, the latter's uneven implications – which are intermingled with the movements of cultural and economic change as discussed in Chapters 4 to 6 – seem undeniable. The least one can say is that, when comparing the 1980s with the early 2020s, evolving regulatory frameworks have left numerous citizens in Western Europe with more insecurity and less discretion in shaping their living conditions. In addition, while most Europeans have access to the expanding sectors of organised welfare provision (for instance, employment services or health-related rehabilitation), extant facilities are often designed in ways that make them less effective. This is particularly detrimental to citizens with limited power to ensure their access to welfare programmes or to resist lean management practices in human service settings. Being underexplored in the wider welfare state literature, the complex social impact of this imbroglio may also be influenced by the organisational factor in the provision of social support – which is the theme for the next section of this book.

## PART IV

# The ‘makers’ of welfare: organisational dynamics across welfare sectors in Western Europe

## OVERVIEW AND APPROACH

In modern societies, ‘organisations and frontline workers are central to the shaping of welfare policies’ (Dussuet and Ledoux 2019: 589). To be sure, modern organisations often constitute ‘bounded, rationalised, and formalised spaces in which economic opportunities intersect with structures of exclusion and disadvantage’ and thereby contribute to (re)producing social inequality (Amis et al. 2020: 195; 197). Furthermore, they may be subject to external interference that sustains this process or impedes efforts to withstand such dynamics. This also pertains to welfare organisations as they operate in an environment replete with imposed procedural norms, restrictive funding schemes and coercive accountability rules. Hence, those (collective) actors that put public programmes into practice – labelled the ‘makers’ of welfare in this book – often appear to be pawns in a politico-administrative game dominated by others. Many of them are entrusted with mere executive functions, such as processing legally defined benefit payments to families or pensioners.

In various instances, however, welfare organisations constitute places for collective agency and, in this function, often turn out to be ‘essential for societal progress’ (Mair and Seelos 2021: 7). The implementation of those regulatory frameworks that have been described in Part III of this book frequently rests on energetic forces such as professionalism, bureaucratic ethos and strategic exchange with civil society actors or social movements. Furthermore, agencies entrusted with the implementation of benefit schemes frequently (must) engage with recipients in proactive ways and may even shape the spirit of a given welfare programme – for instance, when their staff check a user’s ‘deservingness’, enquire about personal circumstances and suggest in work-progression routes, say in a jobcentre or an agency granting disability benefits (see e.g., Freier and Senghaas 2022). The importance of such organisational discretion is widely acknowledged by public administration theory (for many: Moe 1995; Christensen et al. 2020) and is particularly prominent in work related to the umbrella concept of ‘street level bureaucracy’ (Lipsky 2010), especially where activities are more situational and ‘hands-on’ (see e.g., Lohmann and Lohmann 2002; Hughes and Wearing 2017; Brodtkin 2020; Trappenburg et al. 2022). Therefore, research probing the functioning of public programmes should account for the ‘organisational factor’ at play in the very infrastructure of modern welfare states.

This book section will shed light on the mechanisms that shape the underlying forms of collective agency, excavating the evolving role of the ‘makers’ of welfare provision throughout various sectors and countries, with a focus on the three stages of human life course (childhood,



active labour market participation, old age) mentioned earlier in this book. The roadmap to explore the respective territories comprises two milestones. Our journey will start by portraying the evolving landscapes of organised welfare provision throughout Western Europe in greater detail (Chapter 11). In methodological terms, this endeavour resembles the approach used for the analysis of regulatory frameworks for welfare arrangements in Part III of this book. The landmarks guiding this enquiry include changing task environments throughout the fields under study, the structural transformation of the public sector and of social administration and the evolving contribution of non-state organisations in the areas under study. The ‘construction material’ for this consists of studies that depict the above landmarks and their changing character from a bird’s eye view, without considering national specificities. The analysis ends with a short reflection on how to grasp the directions of collective agency throughout the universe under study in a more systematic, that is, category-led, way (see below).

The second milestone (Chapters 12–14) is an investigation based on ‘quasi’-scoping reviews that condense evidence about dynamics throughout those (sub)fields that have been illuminated in Part III of this book. Concerning processes of empowerment addressing the youngest generation, the chief observational units include focal agencies orchestrating the child protection endeavour, as well as agencies entrusted with providing child and family welfare services. With regard to the issue of (decent) labour market participation and related collective agency, the analysis addresses the operations and inner life of various organisations involved in work (re-)integration activities. Turning finally to the issue of a safe old age, the units selected for the in-depth analysis are agencies participating in the provision of personal care to elderly people. The reviews are introduced by a brief sketch of the nature of the activities carried out within organisational settings relevant to these (sub)fields. While the entire investigation was not aimed at providing a representative picture of the scholarship on organisations operating in the areas under study, it rests on a systematic screening process which is further described in the box below. In essence, this process was based on a collation of evidence from more recent case studies, some of which having been (co-)produced by the author of this book. The focus on case studies is appropriate for the purpose of the subsequent investigation as they enable ‘an empirical inquiry that investigates a contemporary phenomenon ... in depth and within its real-world context’ (Yin 2014: 16). In the universe under scrutiny, a case might be an entire organisation (often with a focus on key elements or segments of it) or several organisations. Where the latter applies, the analysis adopts the form of a ‘multiple case study’ (Stake 2006). Arguably, knowledge emanating from the scoping reviews can be deemed going beyond understanding isolated social phenomena, at least when the (set of) unit(s) under inspection represents a ‘typical’ class of cases – which, in this book, pertains to the role, structure, technology and embeddedness of a given welfare arrangement (Flyvbjerg 2006). Related findings lend themselves to the conclusion that observed developments may affect further settings from the same area or under the same regulation (Wooten and Hoffmann 2017).

## THE RESEARCH DESIGN: ANALYSING COLLECTIVE AGENCY IN ORGANISATIONAL SETTINGS BY CONDENSED SCOPING REVIEWS

In the following chapters of this book section, the ‘makers’ of organised welfare provision are subject to a secondary analysis of published scientific work from various Western European countries that contains thick descriptions of evolving organisational settings and collective agency therein. The design for this was inspired by the concept of scoping reviews, which have become a much-used tool for picturing the ‘state of the art’ in a given field of academic enquiry. Very prominent in the natural and medical sciences, this concept has also found its way into social research. In the related universe, there is a great variety of technical approaches, with narrative and systematic (umbrella) reviews forming the two ends of a long continuum (Grant and Booth 2009). The scoping exercise undertaken for this book went beyond a mere narrative review in that it was geared towards capturing different types of configurations emerging throughout the reviewed literature. However, it was not organised as a systematic review drawing on distinctive inclusion criteria such as high-ranked journals. Rather, the material under study was composed of book chapters and journal articles showing a close thematic fit with the aforementioned research questions. In this sense, a ‘purposive sampling’ was performed to compose sets of relevant and evocative case studies. The material was collated for distinctive classes of cases (organisations, organisational elements) to grasp the dynamics typical of the (sub)fields under scrutiny. In the re-analysed scholarly work, the underlying research designs had typically focused on questions such as ‘How is an organisation going?’, ‘What are pressing challenges?’ and ‘What do critical members do?’ The screening process was operated by browsing the Google scholar database and complementing that with a snowballing procedure, using relevant keywords, going through abstracts, selecting suitable studies and assigning information therein to categories inferred from theoretical reflections. Importantly, these categories (see Subchapter 11.3) emanated from a dialectical process during which theoretical models were blended with empirical evidence from research projects conducted by the author of this book, mostly in collaboration with other colleagues or associates (Aiken and Bode 2009; Bode and Streicher 2014; Turba et al. 2019; Bode and Turba 2020; Albert et al. 2022; Betzelt and Bode 2022). This work has – over the years – been based on funding received from different sources (the EU framework VII programme; the research department of the French Ministry of Social Affairs; the German Research Council; the research fund of the Nordland region in Norway; the Hans Böckler Foundation in Germany).

To address an international audience and facilitate further reading, the ‘quasi’-scoping reviews are confined to articles written in English, with very few exceptions. The focus was placed on material published in the new millennium, with a preference given to chapters and articles produced towards the end of the observation period (1980–2020), in order to capture change outcomes at this moment. In most cases, the research under scrutiny had built on qualitative evidence and had been gathered via tools such as documents analysis, focus group discussions or problem-centred interviews with agents and/or users. In general, a qualitative approach proves fruitful when probing complex dynamics within organisations (see e.g., Justesen and Mik-Meyer 2012), which also applies to those agents that

are involved in the very process of welfare provision. Typical study designs elicit thick descriptions of praxis, reflecting both the ‘imprint’ of institutionalised norms on relevant organisations and the ways that relevant ‘makers’ navigate these norms. They also address organisational commitments to such norms within hostile environments, for instance when administrative prescriptions urge agents to bend the rules.

The observations presented in the next chapters are inferred from systematic content (re-) analysis of the above material, geared towards assessing overriding features and processes in the settings under scrutiny. The material was read side by side to figure out overlapping messages and compare evidence across units of analysis. Findings on organisational dynamics are not presented country-by-country, given that major phenomena at this level of social action often resemble each other across institutional contexts, at least throughout the territory under study. Again, the results finally feed into a reflection about how they connect to principles inherent in (the vision of) social modernity (see the overarching analytical grid presented in Chapter 2). These principles provide ‘qualitative benchmarks’ against which one can inspect organisational dynamics in abstract terms. Among other things, this helps flesh out whether collective action related to organised welfare provision constricts or endorses the principles of social modernity throughout the (sub)fields under study.

The rationale guiding the investigation in this part of the book is informed by both insights from organisational theory and the analytical grid developed earlier in this book, which can be translated into a number of concrete research questions. First of all, are the organisations under study places where the respect ‘for the sacred’ is, in one way or another, cultivated by collective agency when it comes to orchestrating social support for vulnerable human beings, irrespective of what the latter (have) contribute(d) to wider society? Once these organisations have appropriate resources at their disposal, do they proactively operate in accordance with meta-norms corresponding to the heritage of the Enlightenment, concerning, for instance, the idea of human dignity? Secondly, how and to what extent do organisations in the (sub)fields under study ensure that human effort is honoured regardless of (current) market values? In fact, such organisations may be more or less committed to this principle when performing a public mission or delivering human services, even as collective agency may or may not be geared towards the implementation of social justice norms. This leads to us to a third question, which is whether collective agency in welfare organisations does tally with the modern promise of enhancing (considerate) individual autonomy. Regarding the organisational settings under scrutiny, these questions are anything but trivial. Various strands of organisational theory (see Part I of this book) imply that involved agencies (may have to) pursue inconsistent agendas, are faced with operational constraints and risk deviating from espoused goals due to internal distortions – including tensions between formal and informal action or idiosyncratic sense-making. In light of this, any inquiry into what the ‘makers’ of welfare can and do accomplish, and any investigation into what kind of barriers prevent them from meeting (self-)assigned missions, should consider collective agency through multiple lenses. Related research categories serve as a heuristic to unearth the complexity of the organisational settlement(s) under scrutiny and will be outlined at greater length below. The overall analysis feeds into conclusions that recapitulate the lessons learned concerning the dynamic role of welfare organisations in the making or unmaking of social modernity (Chapter 15).

## 11. Evolving organisational landscapes of welfare provision throughout the human life course

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Throughout Western Europe, democratic capitalism has taken shape in distinctive geographies of welfare that comprise a wide range of organisational settings. The subsequent paragraphs portray these landscapes with a focus on their evolving profile and shifting boundaries. Drawing on observations covering the period between 1980 and 2020, they offer a light historical treatment of those areas that are related to the three life course stages mentioned earlier in this book. The landmarks for exploring this history matter to all sectors and countries studied here. A first signpost is that of evolving task environments (in the sense of Dill 1958), that is, goals and activities that connect typical welfare-providing organisations with their surroundings. In this respect, the current scenery looks different from what existed in the past, that is, the last decades of the twentieth century. Secondly, the wider scholarship has identified important dynamics concerning the role and profile of public sector organisations as basic cornerstones of democratic capitalism – which suggests taking a closer look at these dynamics in the domain of organised welfare provision. A final landmark to consider is the transformation of welfare-providing non-state (non-profit and for-profit) organisations, given that, in most parts of Western Europe, these have remained or become highly relevant to social intervention across the life course stages dealt with in this book.

### 11.1 TASK ENVIRONMENTS ON THE MOVE

When considering relevant landscapes of organised welfare provision in Western Europe, task environments have changed markedly over the last decades. Concerning trends in the broad universe of family and child welfare (for an overview perspective, see e.g., Freymond and Cameron 2006 and Nieuwenhuis and van Lancker 2020), the mission and activities of involved organisations have been ‘on the move’ in different respects. A first cross-national pattern is increasing diversification. Throughout twenty-first century European welfare states, the respective geography comprises novel elements, such as 24-hour care, early childhood pedagogy or post-school interventions aimed at optimising the transition to gainful work. Concomitantly, more traditional missions have seen a ‘job enrichment’. For example, across a growing number of countries, schools have come to embrace social work units that engage with deviant juvenile behaviour or family disruption and are expected to contribute to the social inclusion of disabled pupils. Moreover, a vigorous policy agenda in Western Europe has been the extension of the childcare sector, as this has increasingly become understood as a building block of modern educational systems. Boosting this sector in mere quantitative terms and with an interest in covering greater sections of the (young) population, the mantra of social investment mentioned earlier in this book has had a strong impact on relevant organisational settings, driven by expectations that educational systems should align more neatly with

future needs of the economy and, by extension, the structure of labour markets and employers' requirements therein. In this area, many countries have seen commitments to 'professionalise' extant service facilities. This has altered the overall governance of this sector, with this concerning, for instance, the role of external quality inspection or human resource management. In many countries, the childcare universe has also been viewed as being a perfect place for fostering the social inclusion of disadvantaged communities.

As for organised welfare provision related to the issue of decent work, task environments have changed as well. In the area of employment protection and income replacement, the post-war decades saw the establishment (or extension) of labour market administration broadly speaking. While the architecture of this was, and has largely remained, nation-specific, landscapes in this universe share important commonalities across Western Europe. Internationally, labour administration agencies oversee the compliance of beneficiaries with regulations in force, in the context of more diversified labour markets and novel tasks for workplace inspection units as well as industrial tribunals. Likewise, the expansion and refinement of income replacement schemes have made the missions of involved public bureaucracies more sophisticated (Heyes and Rychly 2013). This also applies to agencies managed by representatives of non-state member organisations (e.g., trade unions, see Clegg et al. 2022). A further important development was the specialisation and professionalisation of rehabilitative endeavour (see Chapter 8), with organisations specialising in the treatment and support of impaired workers, either as an extra component of the wider healthcare system or within a more independent rehabilitation sector. Among other things, rehabilitative endeavour has become more 'employment-oriented' in a number of jurisdictions. Since the 1990s, the 'work (re-) integration infrastructure' has also embraced a large bundle of welfare-to-work activities and case management agencies. Historically, this subfield has developed into a new, diversified branch within European welfare states, giving rise to distinctive occupations at the intersection of social work, technical education and project management. In the same vein, bureaucracies entrusted with regulating the labour market have seen their programmatic emphasis shifting from 'administered' social protection to 'assisted' labour market integration (including active inclusion programmes; see, for instance, Dall 2020).

Finally, concerning organisational landscapes relevant to retirement provision and elderly care – that is, collective agency susceptible to ensure a safe old age – dynamics of change have been complex as well. As for retirement provision, first of all, Western European welfare states have maintained their public pension pillar and related organisational capacities over the last decades (Hinrichs 2021). Although the pillar's relative contribution to pension wealth has shrunken overall, administrative capacities have expanded, in part due to the general extension of labour market participation and salaried employment throughout most European societies. Concerning the (quasi-)public bodies in charge, process complexity has increased, given that the management of ever less consistent careers is often challenging (concerning, for instance, the administration of contribution records of social credits to caregivers, parents or university students). For the non-state pillars, the task environment has changed more dramatically (Stevens 2017; Pieper 2018; Tuytens 2019; Mabbett 2021; Oreziak 2022). Europe-wide, occupational pension schemes have flourished while becoming subject to a process of individualisation concerning the design of saving plans. Third pillar retirement schemes, targeting single plan holders as a matter of principle, have come to address a larger clientele. The involved financial industry has invested in marketing tools and sales departments, which have boosted

the workforce dealing with the organisation of retirement. Besides shareholder pressures to intensify marketing processes, administrative challenges abound, including for example those related to pension plan mobility and investments on ever more volatile financial markets.

Indirectly, changes in the pension system's task environment also influence the conditions of long-term care (LTC) provision, also because organisational strategies in the 'marketised' pension sector impact upon the income a given frail elderly person has at his or her disposal when seeking adequate support, whether in the residential or domiciliary care sector. Concerning the task environment of the former, an overarching trend has been the concentration on severe care dependency. The industry has seen efforts to adapt services to a new clientele, with this entailing a 'job enrichment' for residential care, which has come to embrace rehabilitative programmes, special units for people with dementia and palliative care (see e.g., Froggatt et al. 2017). By and large, care needs have increased in these settings, due to co-morbidities and a growing prevalence of degenerative conditions. Moreover, quality inspection has become an important issue throughout the elderly care infrastructure (see e.g., O'Dwyer 2015), inducing considerable adjustments within the residential sector, but also in the home care field. In addition, with the international movement towards 'deinstitutionalisation' (that is, policies fostering ageing in place), domiciliary service supply has grown in importance internationally. Accordingly, organisations in this realm have turned into eminent components of twenty-first century systems for old-age provision. From the 1990s onwards (at the latest), they have become entrusted with a wide(r) range of services (Bode et al. 2011; Kröger and Bagnato 2017; Hellgren and Hobson 2021), often in a context of 'enhanced patient acuity and complexity' (Strømme et al. 2020: 2430). In many European jurisdictions, domiciliary care has undergone a (sometimes timid) process of professionalisation, giving rise to new occupations or at least novel job profiles. In the new millennium, home care packages embrace nursing and home help as two major building blocks, each ramified in different ways according to national traditions. In this vein, the remit of involved organisations has become more challenging. Mainstream providers must manage more complex transitions from, and to, other human service agencies. Many care organisations have adopted entrepreneurial traits because they operate in competitive markets (Ledoux et al. 2021). Also, contemporary home-care agencies may be led to offer a mixed support package, including daycare or respite care (providing an intermittent relief to private caregivers). Some activities have been designed as low-skilled activities, devolved upon poorly paid staff on 'petty jobs'. Staff employed in this sector have often to come to terms with informal caregivers (relatives, volunteers, undeclared domestic workers) and also must account for users who are living alone in their homes and receive little private help to manage their daily activities on a regular basis. Organisational complexity is growing here as well.

## 11.2 STATE, NON-PROFIT, PRIVATE – THE EVOLVING INFRASTRUCTURE OF ORGANISED WELFARE PROVISION

A basic landmark to consider when exploring the organisational settlement of twenty-first century welfare states is the changing character of the infrastructure for the provision of benefits and services. A fundamental issue here is ownership. As argued earlier in this book, European societies have set up welfare arrangements (benefits and services) by either creating

special public agencies or by liaising with non-state partners from different quarters, including private businesses. The related architecture appears complex, however. In general, state agencies have maintained a remit to directly implement policies in the public interest – that is norms emerging from political deliberation about what a given citizenry wishes to ensure in terms of collective goods. Political authorities thus make ‘structural choices’ (Moe 1995) as regards the very operations of welfare organisations regardless of ownership issues. At the same time, given that the provision of public services has never been a state monopoly (see Powell 2019), influences from non-statutory forces can deeply affect the administration of welfare arrangements writ large. Non-profit ownership and governance are generally associated with distinctive organisational characteristics – among which are the use of collectively earned revenue for agreed social objectives, defined by a membership with no (declared) interest in personal income generation, and goals defined with reference to special constituencies, such as religious groups, distinctive socio-cultural milieus or local neighbourhoods (Lang 2013; Young 2021). Simultaneously, however, statutory welfare programmes have made many non-profits ‘partners in public service’ (Salamon 1995; Bode and Brandsen 2014) – notwithstanding these partners’ propensity for pursuing multiple goals (Hasenfeld and Gidron 2005), which may include political advocacy based on monitoring and commenting on governmental action. Many non-profit undertakings have reinvented themselves as entities that generate market revenue and optimise balance sheets while maintaining classical content goals – which is an approach encapsulated by the concept of ‘social enterprise’ (Garrow and Hasenfeld 2014; Laville et al. 2015; Defourney and Nyssens 2021). Similar tendencies have been observed for private charities, including those drawing on donations and private sponsorship for benevolent projects (poor relief, shelter for homeless people etc.), given that such projects confront more volatile stakeholder environments and new needs for competitive fundraising (Roy et al. 2021). Overall, this movement towards ‘marketisation’ undergirds (new) hybrid organisational designs in the field of welfare provision broadly speaking (Billis and Rochester 2020). Concerning for-profit welfare provision, which has expanded worldwide in scope and ambition since the 1990s (Pieper 2018; Pålsson et al. 2022), the complexity inherent in the relationship between ownership and stewardship is even more apparent, as commercial organisations are subject to the same frameworks as their non-commercial counterparts but often pursue a specific economic agenda. Hybridity is an issue here as well, given that rent-seeking, being a fundamental motivational source in the governance of commercial organisations, must be attuned to both (non-economic) content goals imposed from outside and professional norms which are intrinsic to organised welfare provision and tend to influence many employees in Western European welfare sectors. Similar dynamics may affect organisations managing income replacement schemes, including for-profit insurance companies that extend their ‘hunting grounds’ to new areas (retirement provision, mainstream healthcare insurance) or non-profit sickness funds that have come to compete for enrollees in some jurisdictions. The following will elaborate on such trends in greater detail.

### **Dynamics in the Public Sector**

As for public sector and statutory social administration broadly speaking, organisations in this realm became a key lever for organising welfare arrangements during the twentieth century, albeit with considerable international variety (Rodgers et al. 1968). While collective agency

in statutory organisations has often been associated with goal displacement and mission drift – with permanent allegations of excessive ‘red tape’ – there is evidence that they can be a place for innovative action as well (Al-Noaimi et al. 2022). Regardless of this, the public sector has seen various transformations from the 1980s onwards, among which are intensified functional differentiation (including within public welfare departments), the ‘industrialisation’ and ‘agencification’ of state oversight, and the ‘corporatisation’ of organisational settings, that is, the creation of operational units that are only loosely coupled with their administrative stakeholders (via contracts or balance sheet accountability). The mantra of ‘New Public Management’ (NPM, see Subchapter 3.1 and examples below), proliferating across most parts of Europe since the 1990s, has proved to be crucial here. Among other things, this approach to public administration, imbued with ideas emanating from the world of private business, entails the invention of budgeting exercises based on piecemeal performance measurement, reflecting a philosophy of managing public affairs that is commonly labelled as ‘government by numbers’ (for many: Bartl et al. 2019). With the rise of NPM, decision-makers in the public sector were incited to shift practical responsibilities (e.g., allocation of budgets, human resource management, controlling, process innovation) from top to middle managers, with the latter made accountable for ‘outputs’ and problems in their own turf. Pay-for-performance schemes have been a major lever for this, with one intention being to spur internal entrepreneurship, including within organisations pursuing a more classical bureaucratic mission (such as paying welfare benefits on the basis of legal eligibility criteria). In this vein, the wider welfare universe has seen a strong influx of management consultants drawing on concepts established in the world of private business. Change has also occurred in the territorial dimension, as responsibilities have become decentralised in many European jurisdictions (Leibetseder et al. 2017). This holds even though some countries have seen efforts to make state authorities take back control of critical processes (e.g., quality assurance), which reflects the public sector’s modern dilemma between specialisation and integration (Bezes et al. 2013; Grell et al. 2022). Although more recent scholarly approaches to public administration have become more reluctant to recommend NPM-driven governance models, the imprint of this mantra on the organisational settlement of twenty-first welfare states is undeniable in many parts of Europe (Sowa et al. 2018).

With regard to child and family welfare services, public sector agencies have remained key players internationally. However, enhanced horizontal specialisation has been found to contribute to a growing ‘fragmentation’ of the related infrastructure (see e.g., Vuorenmaa et al. 2016: 208, for the case of Finland). The latter has been affected by complex movements of splitting up and re-coordinating organisational units, most prominently in cases where tasks of human service provision extend over various services (e.g., counselling, mental healthcare, outreach social intervention, institutional care). A related phenomenon has been the ‘split in governance structures’, which is blamed for a ‘diffusion of responsibilities and the lack of a single agency governing early childhood’ in some of the literature (see Kagan and Roth 2017: 145, commenting on England). While NPM’s impact on relevant organisational landscapes undoubtedly differs across European jurisdictions, public authorities’ efforts to exert control over the delivery of related services have grown overall. In some jurisdictions, local authorities have maintained a lot of discretion concerning the inspection of service delivery processes or may at least prompt providers to apply performance management schemes (Kroll and Proeller 2013, for the case of childcare in Germany). Elsewhere, there have been attempts



to 'rationalise' public oversight by entrusting distinctive administrative units with auditing, inspecting and evaluating involved providers, at an arm's length from government. This trend is epitomised by the creation of special agencies, such as the British Office for Standards in Education, Children's Services and Skills (Ofsted; Hood et al. 2019). Such agencies have a remit to monitor organisations in this area and to align practices with public prescriptions, particularly after poor inspection results (e.g., concerning numeric targets). Over the last decades, this 'agencification' of state oversight over human service provision has been an important vehicle for the reorganisation of the public sector internationally (Verhoest 2018). Importantly, this trend has often become articulated with a distinctive performance culture. Thus, in some countries, public funding to educational undertakings depends on documented learning results, which translate into staff bashing when these results appear to be poor (see Devine and Cockburn 2018, dealing with public schools in England). In social work with children and younger people, agents have become exposed to the idea of evidence-based intervention (Vandenbroeck et al. 2012) – which may make managers and front-line workers keen to concentrate on formal objectives instead of content goals. A further repercussion of NPM throughout the family and child welfare sector has been the (partial) corporatisation of service provision. In many places, this has occurred with the outsourcing of activities to (formally) independent service providers, along with attempts to reduce costs (for the public purse). From the late 1980s onwards, countries with an entrenched tradition of state-based (in-house) service provision have devolved a good deal of such tasks upon suppliers that operate at arm's length from public authorities (Geys and Sørensen 2016; Plata-Díaz et al. 2019; Davies et al. 2020; Dorigatti et al. 2020). Childcare is a case in point. Elsewhere, previously established approaches towards partnering with independent (primarily non-profit) organisations have been transformed into more business-like arrangements under more formalised accountability systems (Bode 2011). This holds despite growing efforts to involve major stakeholders in formal networks (mostly at local level) concerned with information exchange, public deliberation and policy feedbacks (see e.g., Breimo et al. 2017).

Corporatisation, as well as the split between (quasi-) public authorities and service-providing organisations, has been particularly vigorous in organisational settings with a remit to run or orchestrate activities related to work (re-)integration activities and a potential for providing all citizens during their working age with opportunities for decent work. While developments in this realm have been varied across Western Europe (Jantz et al. 2015), relevant (quasi-) public sector agencies have seen a comprehensive internal restructuring (Heyes and Rychly 2013; Greer et al. 2018) – with the mantra of NPM being a driving force. This movement also affects the interface between these agencies and non-state organisations operating under active inclusion schemes, including special bodies for managing and running job promotion measures, for example in the field of further (vocational) education, where such bodies have been active from the 1970s onwards. As noted in Chapter 8, employment services, after having developed into a public sector institution throughout the twentieth century, have seen important changes concerning their mandate, given the partial privatisation of placement services, the advent of active labour market policies and the amalgamation of benefit and job search assistance schemes (including their control function). Throughout the entire universe, the European mainstream from the 2000s onwards has been the development of performance management techniques and private contracting models (Greer et al. 2018a). Involved organisations have been instructed, or have committed themselves, to follow fine-grained operational

prescriptions (such as pre-defined staff-user ratios) and to apply standardised (IT-based) case management tools – notwithstanding considerable variety concerning how agents interact with benefit claimants and jobseekers (Kupka and Osiander 2017; Clouet et al. 2022). In some jurisdictions, the lion's share of work (re-)integration activity lies with the municipalities where the responsible bodies have a certain flexibility in the interpretation of national guidelines (see e.g., Dall 2020; Bakkeli et al. 2022). Elsewhere, national agencies (or quangos) are eager to develop (more) universal standards. Concerning active inclusion schemes based on EU funding (for instance, from the European Social Fund, ESF), the respective units are led to obey supra-national rules (see Scalise 2020, studying developments in three European jurisdictions). In many jurisdictions, (quasi-)public bodies purchasing welfare-to-work (or active inclusion) services from independent providers have often been led to apply highly standardised, quasi-market models in their procurement role (concerning, for instance, assisted job search, vocational training and subsidised temporary employment). Approaches always differed, and still differ, across Western Europe, with some being tough and others less strict. In France, for instance, the public management of the field has long been quite lenient, featuring 'payments per users' (instead of 'by result'), classic public grant making and annual funding settlements specifying numbers of clients but no outcomes (Schulte et al. 2018: 333). Likewise, Italian active inclusion schemes at municipal level have taken shape with a soft application of conditionality norms (D'Emilione et al. 2019: 60). In Britain and Germany, performance management tools used by procurement agencies have proved to be more rigid (Greer et al. 2018b; Betzelt and Bode 2022).

Regarding health-related rehabilitation as a further building block of work (re-)integration effort, public sector organisations have remained the dominant provider in many West European countries, except those with a longer standing welfare-mix tradition. Concerning the organisational settlement in this field, funding agencies have been found to develop management tools that make referrals to independent providers depend on measured results in terms of treatment outcomes (Bode 2019b, for the case of Germany). Elsewhere, this approach, rooted in the mantra of NPM, has nourished fears that (measurable) results in terms of 'restored human capital' inform decisions of commissioning bodies, regardless of doubts concerning the validity of the discussed data (Taylor et al. 2018). More generally, streamlined funding and accountability rules collide with rehabilitation services confronting ever more complex job challenges (Peter et al. 2020, for the case of Switzerland; Harsløf et al. 2017, concerning Norwegian social workers in rehabilitative hospital settings). Internationally, this connects with developments in the healthcare sector more broadly, such as the underfunding of services and the proliferation of quasi-market governance models (see e.g., Simonet 2015; Vicarelli 2015; van der Pennen et al. 2015; Vrangbæk et al. 2017; Bode et al. 2017, 2019a; Allen 2020; Elkomy and Cookson 2020). As Martin et al. (2021: 1479) phrase it in a case study from Scotland, 'senior medical professionals in the acute sector are increasingly required to accommodate, reinterpret and integrate market, corporate and state logics into ... relationships with other clinical and care professionals'. Related expectations have emerged as permanent pressures even where NPM principles have been applied only in selective ways (Dan 2017: 179–217; Stephanson 2020, for the case of Norway). Further challenges have appeared with policies aimed at establishing (or improving) 'integrated care provision', involving, for instance, a more intensive coordination between hospitals and other care services. Clinical staff are here urged to engage with bottom-up, boundary-spanning, collaborative activities

(Høyem et al. 2018, dealing with Norway) under a general pressure to reduce the number of, or avoid, hospital admissions (Renger and Czirfusz 2016, commenting on Germany) and to shift a greater share of healthcare towards outpatient settings (Bhattacharyya et al. 2020). These trends resonate with developments in the non-commercial healthcare insurance sector in countries lacking a state-run national health service (for instance, Germany, the Netherlands, France or Belgium). This sector, while having a clear legal remit and being under state oversight, includes sickness funds with a quango status which are (co-)managed by representatives of enrolled members or member associations (trade unions, employer associations). This set-up makes the sector a loosely coupled universe within the wider welfare state. In some countries, this universe saw a wide-reaching overhaul during the 1990s. Sickness funds have become involved in an open competition for plan holders and have evolved into ‘market players’ seeking to control, or influence, the activity and performance of healthcare providers (Bode 2010; Okma et al. 2020). While it seems that this ambition has not always been crowned with success, the restyled organisations tend to advocate policies which expand related prerogatives. This trend towards ‘managed care’ (Shmueli et al. 2015) has been compounded by the expansion of co-insurance contracts offered by the financial industry (on an occupational or voluntary basis) – which, among other things, is driven by the interest of more affluent citizens to quickly access specialist care services in a context of welfare retrenchment (e.g., in Spain and in Italy, see Petmesidou et al. 2020).

As for organisational action needed to ensure a safe old age, arrangements for retirement provision (social security or basic pensions) in Western Europe have largely remained incumbent on (quasi-) public sector agencies – bearing in mind that, in some countries, pension administration has long been devolved to non-state bodies under public oversight. The involved administrative units have become exposed to the NPM mantra in similar (though milder) ways as their counterparts in the healthcare and social welfare sector. Studies in this field are rare but suggest important repercussions in terms of internal restructuring, mostly with respect to accountability issues (Christensen et al. 2017) or the division of labour within the public administration universe (Klenk 2008). Competition with other providers is symbolic as there is no economic rivalry between the public pension pillar and other providers of retirement income. Concerning public sector agencies in the area of elderly care, dynamics of change are more palpable. In various European countries, public care sector has lost ground, as service delivery has been devolved to non-state providers in many instances (Wollmann et al. 2016). This is certainly true for the residential sector where public providers, once the backbone of the local welfare state, have lost their hegemony in extant landscapes of elderly care provision. In countries with a national health service, (district) home nursing has often remained under the state umbrella, notwithstanding some exceptions (Spilsbury and Pender 2015). In Nordic welfare states, municipalities became involved in home care provision quite early and have continued to play a crucial role in most places (see e.g., Holm et al. 2017). Elsewhere, the upsurge of domiciliary care provision at the end of the last century largely occurred outside of the public sector, with non-state providers embarking on the supply of paramedical and sometimes home help services (van der Boom 2008; Pacolet et al. 2000). However, these providers frequently received funding from (quasi-)public bodies (social insurance schemes in many cases) and were operating via socio-medical assessments conducted by public sector specialists (see e.g., Dussuet and Ledoux 2019, for the case of France). In the new millennium, (quasi-)public or state-run organisations are widely absent from this

(sub)sector in many European countries. In the UK, for instance, services other than nursing care are seldom delivered by so-called in-house providers anymore – although the latter have long been the dominant player within the LTC system (Glendinning 2012). In this nation and elsewhere, public authorities have been more occupied with commissioning (out-contracting) services (Plata-Díaz et al. 2019; Davies et al. 2020; Moberg 2023), which may involve activities such as performance monitoring, collaboration with stakeholders (e.g., for the identification of local needs), quality inspection and deliberation about user charges or rates of provider remuneration. Where public agencies have remained pivotal in the LTC system, services have often become subject to movements of internal reorganisation that resemble those depicted for the child and family welfare sector as mentioned earlier (Wollscheid et al. 2013). As various bodies (such as community health services, primary care teams and social care divisions of municipalities) are involved in providing support to frail elderly people, such support has come to be organised in a ‘myriad of separate and often complex structures’ (McDonald et al. 2019: 502, for the case of Ireland).

### **A Changing ‘Partner in Service’: The Non-Profit Sector Under Transformation**

In the new millennium, the devolution of public service delivery onto non-profit organisations has been a widespread pattern across Western Europe. In some jurisdictions, the formal involvement of such agencies has long been an exception rather than the rule, and a few countries still seem reluctant to ‘outsource’ the orchestration or provision of classic welfare arrangements. Others have tended to privilege commercial providers when commissioning services (see below). In addition, in recent times, extant gaps in organised welfare provision have often been filled by less formalised social support arrangements, for instance food banks, emergency relief addressing homeless people or lay assistance to refugees – with the involved initiatives and associations undergoing a boom on various occasions. That said, internationally, the ‘professionalised’ non-profit sector has remained or become a major backbone of most European welfare states. At the same time, it has seen a comprehensive transformation in many places.

As for child and family welfare, first of all, the involvement of non-profit providers has been prominent from early on – although some countries have ‘discovered’ the potential of these providers only more recently (from the 1990s onwards). This particularly pertains to childcare provision and social work with young people (Petrella 2009). Concerning the former, faith-based organisations have turned into key players in some jurisdictions during the twentieth century (see Bode 2003a, for the case of Germany). In this realm, ‘alternative’ service providers have surfaced in the course of time and have grown into a (small) pillar of the respective provider landscape from the 1970s up to more recent times (Pestoff 2019: 43–58; Vamstad 2016, for the case of Sweden). Driving forces behind their emergence have been the perceived lack of (public) service facilities or groups of parents considering extant organisational models as being outdated, given a growing interest in user involvement, co-production and self-help. Meanwhile, many of these newcomers have morphed into ‘ordinary’ service providers. Some have adopted the status of co-operatives or social enterprises, that is, organisations that define themselves as both standing on their own feet (economically) and responding to the (social) needs of a given stakeholder community (a group of parents, for instance). Importantly, in many places, the non-profit sector also hosts civic organisations that operate as

lobby groups for children. Being a direct expression of a growing civil society universe (van Til 2000; Lang 2013), these groups have made themselves heard at national and international level (Holzscheiter et al. 2019; Lundström 2001, for the case of Sweden).

Concerning the large and variegated field of organisations relevant to ensuring decent work, the non-profit sector matters as well. True, with respect to employment protection and income replacement for jobseekers, the reliance on public bureaucracies has remained the dominant pattern across Western Europe. In some countries, however, trade unions and employer organisations have become involved in the management of (social) insurance schemes and the governance of employment services (Weishaupt 2013). Furthermore, non-state actors have been important players in the area of ‘organised’ active inclusion since the late 1970s. This also holds for a particular type of organisation that has come to be labelled ‘work integration social enterprise’ (see Nyssens 2006; Kostilainen and Pättiniemi 2015; Baraibar et al. 2019; Signoretti and Sacchetti 2020; Dufour et al. 2022). Such organisations, originally founded by civic actors such as social workers, community groups and charitable undertakings, seek to provide employment opportunities and personal support for disadvantaged citizens in fields such as recycling, second-hand trade or public transport. While the generation of income from the sale of goods and services initially was a cornerstone of their concept, most projects have over time become involved in partnerships with the welfare state, notably via contracts that make them deliver pre-defined outputs such as job placements or training certificates (Bode 2013; Dufour et al. 2022). Further players in this field are providers of vocational or continuous training and ‘local nonprofits specializing in holistic services for participant client groups’ (Greer et al. 2019: 1878). In the UK, these non-profits have also operated as umbrellas working with sub-contracted active inclusion projects (Bennett 2017, see below). Endowed with a special (country-specific) legal status, these providers – and other organisations – are subsidised by welfare-to-work programmes with the aim to convey (new) practical skills and occupational experience to (young or long-term) jobseekers, mostly on the basis of a one-off, fixed-term mandate. In the course of time, such welfare-to-work service providers have been urged to comply with detailed formal prescriptions crafted by (public) employment services, most prominently in countries that were impacted by NPM more deeply. Elsewhere, providers enjoy greater latitude in their way of dealing with their clientele – especially in national or local settings that have remained ‘weakly integrated with national public employment services ... and the benefits system’ (Schulte et al. 2018: 327, referring to the case of France). As most welfare-to-work programmes only provide limited material support (e.g., wage subsidies paid for a fixed term), their ‘business case’ proves fragile in twenty-first century welfare states, in part because they frequently compete with private companies employing more productive staff (see below). In various Western European jurisdictions, non-profit provision is also relevant to the area of health-related rehabilitation, given that residential institutions and community care services with rehabilitative functions often have charitable roots or exhibit a self-help tradition. In recent times, this small universe has been exposed to the same pressures as depicted above for the case of welfare-to-work or active inclusion schemes (Sama 2017, for the case of Finland; Hall et al. 2016, dealing with Britain). Importantly, organisations with a non-profit status also operate in a role of civic stakeholders of work-related institutions. During the twentieth century, the infrastructure of such institutions was often co-shaped by (voluntary or salaried) members of professional associations and trade unions (Williams and Abbott 2019). In some European jurisdictions, the latter participate in the management of labour market insti-

tutions (including social insurance schemes); thus, unions have long been able to influence the design of both these institutions and administrative processes therein. As mentioned earlier in this book, however, this influence appears to have dwindled in the new millennium (see e.g., Høgedahl and Kongshoy 2017; Blank 2020: 517–19).

When considering the area of old-age provision and efforts to make it safe(r), non-profit organisations in Western Europe play different parts as well. In their role as civic stakeholders of relevant welfare arrangements, they organise interests, contribute to public opinion building and try to influence policy-makers. Member associations, such as trade unions or groups specialising in the concerns of elderly people (such as Age UK in Britain), are cases in point. In the area of retirement provision, business interests are often viewed as having had a strong impact on institutional change over the last decades, whereas pension policies have hardly aligned with what other associations have claimed publicly (see Bode 2008a: 124–72). That said, various associations have voiced concerns about rising old-age poverty, even as unions have managed to ‘tame’ the financialisation of pension provision in some respects (Anderson 2019b; Grødem and Hipp 2019; Naczyk and Hassel 2019). As for elderly care, organisations in the non-profit sector – and sometimes their national umbrellas – have remained important players in the social welfare landscape of many Western European countries. This holds even though the sector’s relative importance has shrunk in most places (Bode 2013; Leibetseder et al. 2017; Dorigatti et al. 2020), with numerous providers having morphed into more entrepreneurial, market-oriented undertakings. It holds true that activities of volunteers have remained an important element of the care packages available to the frail elderly (Sutcliffe et al. 2018; Kemper-Koebrugge et al. 2019; Skinner et al. 2020). In many places, lay people continue offering help in ‘light touch’ activities (befriending, recreational endeavour) and provide assistance for accessing care services (by giving advice and technical support) – even though these activities have often become decoupled from the professional core of bureaucracy-driven or ‘marketised’ elderly care organisations. Nonetheless, within the latter, committed deciders and workers, as well as board members, have often remained a source of inspiration for mission-based practice, as will be shown in greater detail below.

### **The Rise of For-Profit Sector Provision**

Undoubtedly, the wider landscape of organised welfare provision in Europe has been revamped more fundamentally with the marked rise of for-profit service delivery. True, policy concepts encouraging state authorities to ‘purchase’ public service packages from external providers were predicated on the idea that ownership was irrelevant after all. Whether organisational arrangements would be amenable to adequate social welfare was widely viewed as being contingent on the ‘publicness’ of the involved providers, as well as on the very procedure by which public authorities were selecting their partners. The only critical factors, it was assumed, were the ‘technical’ devices by which these authorities, and political authorities, made them accountable to the citizenry (Aulich 2011). According to the so-called quasi-market model, compliance with public interest should, and can, be enforced by contractual arrangements (Henriksen et al. 2016). However, the fact remains that there is always space within the rules, as many commercial organisations do seek profits and develop political power to defend their cause.

In the area of family-related social welfare provision, a prominent example of private sector involvement is care for the youngest, affected by a strong commercialisation internationally. Typical expressions are the emergence of ‘childcare markets’ (Lloyd and Penn 2012) and the growing role of privately run residential homes (Meagher et al. 2016). At the same time, with ‘weaker regulation’ in the human service field (Lewis and West 2017: 332), sector logics seem to have become less relevant for public policies. This, for instance, pertains to social work with children in England where, during the 2010s, any type of bidder was deemed appropriate, following the conviction that none of them had a monopoly of talent (Jones 2015). Hence, in twenty-first century Europe, the child and family welfare sector comprises various sorts of private providers – some driven by strong interest in revenue generation (including commercial chains) and others being small enterprises run by professionally-minded entrepreneurs. Whatever the character of the involved firms, their expansion has often come with both poor salaries and a low-skilled workforce – which stands in stark contrast to often confessed political ambitions to professionalise the sector further (Ranci and Sabatinelli 2015, for the case of Italy). Meanwhile, the boost of commercial service delivery has extended to child mental health organisations, services for disabled children, the forensic examination of neglected children and agencies inspecting or commissioning services on behalf of public authorities. Thus, while concentrated in some countries and sub-sectors, private sector supply has become a cornerstone of the twenty-first century geography of childcare and child welfare provision.

For-profit provision also matters to areas of work (re-)integration and related efforts to make working lives decent. Concerning employment services, private sector involvement started during the twentieth century, with commercial firms (e.g., personal leasing companies) fulfilling complementary roles in this area (Weishaupt 2013). From the 1990s onwards, such firms took over larger sections of the field – even though (quasi-)statutory agencies remained the focal institution in most jurisdictions. In the Netherlands, reforms three decades ago transferred the lion’s share of the active inclusion endeavour to commercial undertakings (Struyven and Steurs 2005). Likewise, the UK shifted the bulk of the job placement ‘business’ to (mostly) for-profit providers (Sainsbury 2017; Considine et al. 2020). Under the ‘Work Programme’ (2011–18), so-called prime contractors came to control large swathes of welfare-to-work service provision, managing the flow of public funds to subcontracted agencies (non-profit and commercial) – without being obliged to apply other than rough minimum standards (this was coined a ‘black box-approach’). Elsewhere, private sector provision was used for distinctive target groups such as immigrants (Ennerberg 2020, exploring the situation in Sweden); alternatively, it developed in the form of regional experiments (Pastore 2018, dealing with Italy). There is also evidence on failed privatisation (Schulte et al. 2018: 336–7, for the case of France).

Considering health-related rehabilitation in Europe, the role of private providers has grown as well. In some countries, inpatient care has become a stronghold of commercial companies, whereas change appears more creeping elsewhere. A major background for this has been regulatory change combined with an influx of capital funds seeking profitable investments (Pieper 2018; Collyer and Willis 2020; Jeurissen et al. 2021). Germany is a case in point. While many rehabilitation providers were privately owned from their early days, commercial chains have expanded their domain more recently, replacing individual owners step by step. Elsewhere, extant regulatory frameworks enable public sector units to ‘purchase’ services from commercial providers. In England, for instance, there is ‘no evidence as yet of mass privatisation’

(Calnan 2020: 12), yet the country has seen various policy initiatives going in this direction, among which the creation of ‘Independent Treatment Centres’ (under ‘New Labour’ during the 2000s) and the admission of US hospital companies to the NHS quasi-market. A further lever of commercialisation is the (aforementioned) expansion of private healthcare insurance (including via company schemes), enticing patients to access commercial hospitals by disbursing out-of-pocket payments (which is a pattern particularly prominent in some Mediterranean countries).

Private sector provision is also an issue when it comes to old-age provision. Concerning retirement schemes, it is obvious that the financial industry has become a major player in contemporary pension systems, including with respect to lobbying, public opinion building and policy-making (Bridgen and Meyer 2005; Pieper 2018; Oreziak 2022). Given that this industry has been invited to take over a larger share of income replacement schemes, organisational dynamics typical of the financial services industry have proliferated internationally. These dynamics include systematic marketing efforts and a strong influence of performance-related governance, that is, with agents being incentivised to sell saving plans. Under certain circumstances, such financialisation may cause disruption to the organisation of retirement provision (see Berry 2021), notably in the event of poor plan management (mis-selling scandals, poor investment performance of invested plan portfolios, problems in raising profit from fixed-income securities rather than equities). This development has produced a spill-over effect concerning the organisation of long-term care, as (income) insecurity affects opportunities to pay related expenses. In this area, private firms have flourished as well over the last decades. While being subject to public inspection processes in the same way as non-commercial providers, for-profit care homes differ from the latter in that they may strive for high profit margins (Harrington et al. 2017). In a context of institutional frameworks opening LTC provision to commercial providers and chains (see Chapter 9), larger sections of both the residential and domiciliary sector have become populated by organisations who are rent-seeking or at least privately owned. As for care and nursing homes, this ‘corporatization of care’ (Farris and Marchetti 2017) is driven by companies and private equity firms that are operating nationwide or even internationally, in a market that promises a rather secure return on investment (Harrington et al. 2017; Müller 2018; Armstrong and Armstrong 2020; Mercille and O’Neill 2023). Among other things, this is due to the overlap between the housing business and residential care, which implies that private providers sell real estate and human services in parallel (for many, see Horton 2021). In this universe, governance arrangements at times appear turbulent, given rapid ownership change, the distribution of operational units across many countries, and headquarters being (re)located to tax havens. To some extent, such dynamics have also emerged in the area of commercial home care provision. Nowadays, some sections of the privately owned domiciliary service sector are run by commercial chains, although, in most European countries, the domiciliary sector hosts many small businesses established by nurses and otherwise qualified professionals with a local anchorage. This notwithstanding, the mechanisms inherent in NPM-driven governance arrangements have left traces here as well (Bode 2006a; Anttonen and Karsio 2017; Baxter 2018; Giordano 2021). Competing among each other and with non-commercial peers, providers need to cope with demands of both commissioners and ‘customers’. Similar to their non-profit counterparts, many of them struggle with complex formal requirements (more details are provided below in the review of case studies from this field). In some European countries, the homecare



sector also includes free-standing workers ‘employed directly by service-users as “personal assistants”’ and an ‘increasingly significant flank of self-employed workers operating through agencies’ (Hayes 2017: 7, referring to the UK). While housekeeping is a major task of these caregivers, studies suggest that more intimate and body-related acts are often included in their service package (Hayes 2017; Vänje and Sjöberg Forssberg 2021). Apart from (often illegal) migrant care workers providing intermittent support to elderly people (Da Roit and Weicht 2013; Hellgren and Hobson 2021), the home care workforce also comprises ‘live-ins’, which Western European families engage on a 24/7 basis. These used to be recruited by commercial agencies who directed women from Eastern Europe and other less affluent world regions to national care labour markets (see e.g., Bruquetas-Callejo 2020; Apitzsch and Shire 2021). A brokering role in this area is often performed by ‘proxy organisations’ in (Meuret-Campfort 2021, for the case of France). Care recipients employing domestic workers can devolve administrative duties to these organisations that charge a fee for introducing a worker, may cover for absences and provide legal counsel in the event of a dismissal.

### 11.3 DIRECTIONS OF COLLECTIVE AGENCY: CATEGORIES FOR STUDYING THE ‘ORGANISATIONAL FACTOR’

In the remainder of this book section, the evolving organisational settlement of Western European welfare states is elucidated by recapitulating case study evidence about dynamics in settings that belong to those subfields of which the relevant regulatory frameworks have been portrayed in book Part III. Prior to this, however, a toolset, which has been used to capture such dynamics in a systematic way, is presented, departing from the assumption that organised welfare provision in the Western world is based on both strong institutional environments and self-perpetuating collective agency, as was discussed earlier in this book. Throughout modern societies, it was argued, some organisations have the power to ‘colonise’ environments inhabited by other organisations – which implies asymmetrical relations when it comes to shaping tasks, technologies and normative prescriptions. However, as noted, important strands of organisational theory assume that zones for independent collective action exist in various societal sectors. Thus, it is widely assumed that an organisation’s output is heavily influenced by the dominant coalition which is sitting in the driving seat. Concerning typical welfare arrangements, coalitions may be diverse and include, for example, stakeholders rooted in civil society and with an interest in political advocacy. Operational latitude also depends on a given service provider’s position vis-à-vis government. Such leeway is equally contingent on an organisation’s legal status and internal constitution. Importantly, actors operate within public authority-led bureaucracies, quasi-(non-)governmental agencies, non-profit (voluntary) organisations (under contract) and commercial undertakings, all of which exhibit a distinctive governance model. Following neo-institutionalist thinking, moreover, all types of organisations must ‘cope’ with both their relative dependence on environmental forces and a need for partial autonomy, often in a context of different ‘institutional logics’ or with a special mix of them. The result is complex configurations that one must carefully disentangle when studying collective agency related to organised welfare provision.

The Chapters that follow (12–14) are aimed at capturing the evolving role of the ‘makers’ of welfare within the landscape(s) portrayed above. As explained earlier, the investigation is carried out by the help of ‘quasi’-scoping reviews. To structure condensed reviews, we need

research categories that address key issues in the study of the ‘organisational factor’ in contemporary welfare states and focus on the dynamics of collective agency throughout a given welfare sector. As explained earlier, these categories can be derived from the discussion of seminal theoretical work in the first part of this book, in order to apply them to evidence from different Western European countries – albeit without making systematic distinctions between embedding regulatory frameworks at national level. Four categories are used to identify overarching mechanisms across organisational settings as illuminated by a range of (multiple) case studies, with the extracted evidence occasionally fitting into more than one of these categories (even as the latter overlap in some respects).

A first category is organisational compliance with external prescriptions, regardless of whether they are imposed purposefully or inadvertently by a given institutional environment. Modern organisations have often been viewed as machines that make social relations ‘work’ within the confines of a pre-established societal order. In this line of thinking, a combination of hierarchical rule and rationalism pervades most organisational fields. Concerning typical ‘makers’ of welfare, we might expect a good deal of collective agency that reflects conformity to expectations established at society level, notably by governmental action. Welfare organisations and their agents may be alert to the power of institutional stakeholders and respond to related expectations in ostensible ways. This mechanism becomes particularly salient when looking at the fit between organisational behaviour and the design of welfare programmes. The latter may materialise in accountability rules, funding arrangements, models for organisational design or behavioural prescriptions concerning, for instance, the interaction with users or peer agents. They may also become visible with a felt need to adapt to market dynamics, for instance those set off by public procurement policies or those triggered by management concepts that push organisations to deliver welfare in entrepreneurial ways and with the aim of revenue generation. To be sure, external prescriptions can point in different directions. When they are inspired by the vision of social modernity (as discussed in Subchapter 1.2), organisations may undergird this particular vision by sticking to prescriptions with an emancipatory character – although this practice may nonetheless be flawed, for instance in the event of paternalistic forms of programme implementation (e.g., coercive forms of social intervention). A more widespread experience in recent times has been welfare organisations exposed to regulatory norms which contravene the above vision. In this case, the latter have been found to reduce the scope of street-level discretion, divert professional orientations or incentivise models of ‘business reengineering’ that undermine accustomed missions. Either way, regarding organised welfare provision under public oversight, compliance with external prescriptions is a likely mechanism by which the interface between institutions and organisations is processed – simply because legal and bureaucratic norms have a strong bearing for those involved in their application.

A second potential mechanism – and category for the following review – is (latent) idiosyncrasy. This conjecture is derived from theoretical accounts suggesting that, to some extent, modern organisations may be keen, or may be led, to act as ‘self-contained’ players on their turf and beyond, regardless of prescriptions from outside. Organisational idiosyncrasy can adopt different forms. It may arise with collective inertia and or a lethargic response to external expectations. It may also be the result of an entrenched power position that provides agents of welfare organisations with opportunities to neglect external expectations – which is a typical charge levelled at public bureaucracy but may also apply to powerful private-sector firms with

a mandate of human service delivery. Idiosyncrasy equally materialises in attempts to circumnavigate extant prescriptions in order to defend entrenched values (e.g., religious convictions) or material interests (e.g., revenue generation). It may come into play when the agents' aim consists of making a given organisational unit or professional group function in familiar ways even when the wider environment expects changing attitudes. Insofar as organisations are places for translating environmental expectations into practical activities – that is, places for 'institutional work' as discussed in the theory section of this book – collective agency may be geared towards sidestepping norms that members perceive as troublesome. This may be achieved by grasping opportunities to refract them in ways that do not jeopardise an organisation's existence in the short term (e.g., by informal rule bending). As all this may occur in subtle ways or remain unconscious, idiosyncrasy possibly remains a latent mechanism of aligning environmental conditions with collective agency at the organisation level.

A third eventuality (and category) is conservative praxis. While not being driven by idiosyncratic forces, this way of performing a given mandate is also partially decoupled from prescriptions imposed from outside. Subchapter 3.1 referred to scholarly work according to which organisations exposed to strong institutional environments may enjoy some autonomy in order to fulfil a given mission. In the same vein, the wider literature on social policy change (reviewed earlier in this book as well) makes us assume that, in the early twenty-first century, the 'makers' of welfare juggle complex agendas in the face of a tension-ridden task environment. These two observations tally in that they suggest a 'conservative' role of these organisations within modern welfare states. Conservative praxis can be assumed to have two dimensions. The first has to do with welfare organisations carrying out a general mandate in tune with expectations held by influential social, political and civic stakeholders around them. Their activities mitigate eminent social problems and thereby contribute to practically sustaining the wider societal order, as argued by functionalist approaches to welfare state agency in democratic capitalism (see Subchapter 2.2 of this book). Secondly, these organisations 'conserve' the social fabric of current societies by adapting the general mandate to what complex conditions at the frontline (in terms of personal experience, human need, deviating behaviour, stress, etc.) require – including in the event of vague or ambiguous prescriptions inherent in relevant regulatory frameworks. Devising measures in line with what is deemed necessary in a given case and situation, welfare organisations and their staff put in place what is feasible in the light of both the above frameworks and the encountered circumstances. This mechanism eventually helps uphold an organisation's official mission, basic professional orientations, or simply the viability of beneficiaries even under difficult conditions. Among other things, it may include the development of pragmatic orientations in the response to dilemmas that the 'makers' of welfare come across in their day-to-day practice, for instance when they see a need to build trust while being urged to enforce compliance with legal rules. That said, caseworkers who are keen to pro-actively perform their mission(s) often (can) do little more than calming down 'uneasy' situations or repairing damages without being able to challenge the mechanisms through which social problems arise. At the end of the day, they may have to live with what powerful stakeholders (governments, economic elites, influential social forces more generally) deem appropriate in terms of welfare arrangements.

Under certain circumstances, however, involved actors can overcome their conservative role and turn into innovators. Indeed, a further eventuality – and category to be used for the review below – is transformative agency, understood as a fourth mechanism by which (col-

lective) actors relate to extant task environments. This form of collective agency takes shape with operations that are based on (more or less) conscious intentions to make a difference to both accustomed habits and stakeholder claims. Critical realism implies that collective action always carries a potential for abandoning routines and promulgating new ideas (see Subchapter 3.3 of this book). According to various strands of organisational theory, this potential is exploited when creative sense-making goes beyond pragmatic coping behaviour. One ‘engine’ fuelling such transformative action may comprise committed professionalism drawing on expert knowledge, disinterested universalism and ascribed social authority. Under certain circumstances, a given welfare sector – for instance the mental health industry – may achieve such authority and use its prerogatives to alter an industry-specific value system (concerning, for example, the rights of socially marginalised groups) and thereby create opportunities to showcase and develop new models of organised welfare provision. In other words, welfare organisations may contribute to what is often referred to as ‘social innovation’ – bearing in mind that this term has various connotations and has frequently been used to propagate approaches to organisational action that imply enhanced risks of failure and less collective (state) responsibility (Fougère and Meriläinen 2022). History shows that such transformative agency is not confined to young newcomers, hip incubators or groundbreaking social movements. During the twentieth century, various ‘traditional’ welfare organisations have equally sought to change the ‘state of things’. With regard to social development, even ‘hard-core’ bureaucrats couched in strongly regulated welfare (and healthcare) sectors may be able to innovate, by exploiting zones of discretion to make their own programmatic concepts matter. To be sure, such collective agency is not necessarily in tune with ideas contained in the vision of social modernity (see the discussion in Chapter 3). While transformative agency in welfare organisations has often had a progressive drive in modern times, it may also nurture a ‘roll-back process’ implying regressive tendencies when taking Enlightenment values as a yardstick. This happens when welfare industries perform in ways that privilege the most fortunate while exposing others to old or new risks – for instance, pension schemes putting savers at risk or care providers investing in services based on out-of-pocket payments. This, however, will be basically classified as idiosyncratic orientation in what follows – whereas the analysis of transformative agency undertaken for the ‘quasi’-scoping reviews below concentrates on socially progressive action.

Overall, then, collective agency in the organisational settlement of advanced modern welfare states may rest on various mechanisms, move in different directions and have multiple repercussions. The following chapters will scrutinise the role of the ‘makers’ of welfare through some increasingly relevant areas of social administration and human service provision, in order to capture the directions taken in the recent past. This is accomplished by retracing forms of collective agency within welfare organisations across Western Europe. Each chapter starts by briefly elaborating on the nature of such agency in relevant settings, meaning core elements and circumstances of related practices in a given institutional context. Chapters 13 to 15 will then present ‘spotlights’ on striking phenomena, that is, key developments substantiated by the ‘quasi’-scoping reviews undertaken for this book part, with each review exercise assigning these phenomena to the four categories delineated above.

## 12. Empowerment against all odds? Collective agency in child protection services

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Earlier in this book, child protection was depicted as a vital component of family and child welfare programmes across Western Europe. Child protection agencies form an important component of the wider welfare state infrastructure concerned with empowering children (and their parents). Chapter 7 of this book gave a rough overview of the type of organisations operating in this field, making a distinction between focal public agencies with sovereign functions, on the one hand, and service providers working with users at the street-level, on the other. Prior to shedding light on the evolving organisational settings throughout this universe, the following elaborates on the nature of the activities accomplished in these settings, in order to convey a general understanding of how child protection is processed in practical terms.

A first major characteristic of the child protection sector is its special labour force. In the sector's core, social workers are the most prevalent occupation although other occupations are involved as well (see below). Day-to-day operations are based on interactions with peers and clients. During care conferences and progress meetings, a child welfare worker encounters both users and colleagues. Teamwork is widespread, for instance when it comes to collegial debriefings and decisions on child custody. The task environment comprises a wide range of activities, all under a legal mandate which centres on the promotion of both children and families. That said, the mandate also involves the control of parents, including support for prosecution services once this is deemed indispensable. For the involved agents, key duties include the identification of maltreatment and related clearing processes, parenting and custody and behavioural treatment. These activities presuppose gaining insights into ingrained family patterns by performing 'investigation work', which frequently involves a 'rationalization process' (Avby 2015: 108) through which complex information is broken down into 'case stories'. In recent years, child protection work in Western welfare states has seen new 'frontline practice expectations' (Collins-Camargo et al. 2019: 125) based on standardised procedures or even (allegedly) evidence-based models for social intervention. While this has altered the character of casework in various instances (see below), discretionary space has remained considerable even under restrictive welfare programmes (Murphy 2023).

This hints at a second major characteristic of child protection work, namely the experience of what can be labelled indeterminacy of practice. 'Complexity is front and centre' (Khoo et al. 2020: 2105), as many child protection cases prove to be haphazard and intricate. Related collective agency is 'full of complex challenges and emotions and sometimes drama' (Ferguson 2018, referring to home visits in England). On many occasions, quick fixes are needed, including 'difficult prioritisation' (Olsvik and Saus 2022: 464). Frequently, child protection work requires improvisation and is an uphill struggle. Thus, caseworkers need to form alliances with children and/or parents who may behave in provocative ways or sabotage efforts, which in turn may call for emergency strategies (such as an escalation regime). For many of the encountered

problems, there are no ‘simple linear solutions’; rather, agents resort to ‘quick heuristic or intuitive modes of decision making’, as available information often proves ambiguous (Saltiel 2016: 2105; 2106). Despite ‘attempts to control complexity through disassembling, sorting, and measuring various aspects’ (Khoo et al. 2020: 2102), situational flexibility is a ‘must’. Accordingly, leadership in this sector is viewed as being ‘demanding, emotionally charged, and unpredictable’ (Olsvik and Saus 2022: 467).

Thirdly, welfare organisations in the child protection sector are embedded in ‘demanding’ environments, featuring extensive public scrutiny and high expectations in terms of probity and lawful behaviour. In the current times, the sector is embedded in a zero error-culture, with agents held responsible for any harm that appears avoidable from outside. A typical consequence is extensive paperwork, making practitioners permanent ‘authors of accountability’ (Gibson et al. 2018). In many jurisdictions, moreover, public authorities and their stakeholders expect detailed reporting, materialising in grant deliverables, control plans and records on (alleged) achievements. Non-state providers are faced with challenging demands in terms of resource procurement and responsiveness to what commissioners and shifting programmes require. In addition, the involved organisations are often expected to collaborate with peer agencies and to invest in programme development as well as service innovation (Breimo et al. 2017), sometimes driven by hopes to meet ‘community needs inexpensively’ (Collins-Carmargo et al. 2019: 127, referring to the US). Furthermore, being experts in the field and advisers to public authorities, they may feel a need to exert influence on political stakeholders and develop skillsets related to advocacy. All this requires ‘navigat[ing] the boundaries between upper- and mid-level dimensions of organisational practice (e.g., from policy and programme development and administration to its implementation)’ (ibid).

Thus, the mandate of contemporary child protection organisations is replete with challenges, shaped by both institutional environments (including public policies) and the intricacies of human service work. Yet what is the ‘organisational factor’ in the development in this (sub)field? Which role do involved ‘makers’ of welfare play under twenty-first century conditions? Do involved agencies merely ‘execute’ public prescriptions including those inducing limitations and inconsistencies throughout contemporary child protection systems? Or do they provide empowerment against all odds, including through resistance to extant pressures? In what follows, evidence from a number of recent case studies conducted in different parts of Western Europe will be reviewed to provide answers to these questions. In technical terms, findings from these studies are assigned to the research categories described at the end of Chapter 11, sometimes to several of them. Table 12.1 highlights examples presenting particularly evocative case studies (in the left-hand column) and contains a set of further pertinent sources to endorse key observations. These are summarised in the right-hand column of Table 12.1 and are spelled out at greater length in the subsequent paragraphs.

(A) To begin with, European research into organisational settings in the child protection field and their development since the 1990s suggests that much collective agency in these settings is geared towards *complying with external prescriptions*. As shown in Part III of this book, these prescriptions have become more rigorous over the last decades, concerning both the ‘resoluteness’ of the welfare state’s mandate and the preconditions of related social intervention by various field organisations. Considering relevant case studies, empirical observations often point to how rising expectations in the organisations’ wider environment (politics, media; see above) exert pressure on the latter. The public emphasis

*Table 12.1 Condensed scoping review relating to child protection organisations*

	Evocative case study evidence	Other sources with relevant insights	Manifestations
Compliance with external prescriptions	Bertotti 2016; Leigh 2019; Seim and Slettebø 2017.	Albus and Ritter 2018; Ellison 2007; Fazzi 2019; Frost et al. 2018; Gibson 2016; Khoo et al. 2020; McFadden et al. 2019; Morris et al. 2018; Olaniyan et al. 2020; Olsvik and Saus 2022; Tonkens et al. 2013.	<ul style="list-style-type: none"> <li>– Commitment to (formal) perfectionism in child protecting work.</li> <li>– Conformity to enhanced (hierarchical) specialisation and less holism.</li> <li>– (De facto) acceptance of neo-bureaucratic governance and stronger work process and cost control.</li> </ul>
(Latent) idiosyncrasy	Avby 2015; Devlieghere and Roose 2019; Morris et al. 2018.	Albus and Ritter 2018; Bertotti 2016; Bode and Turba 2020; Gibson 2016; Murphy 2023; Khoo et al. 2020; Skillmark and Denvall 2018; Turba et al. 2019; Wastell et al. 2010.	<ul style="list-style-type: none"> <li>– Use of professional or personal power and discretion to delimit accountability to others.</li> <li>– Delimiting one's turf by devolving activities on others.</li> <li>– Exploiting opportunities for self-opinionated decisions.</li> <li>– Disengagement driven by despair, inner resignation and observed instrumental behaviour.</li> </ul>
Conservative praxis	Bode and Turba 2020; Ferguson 2018; Olsvik and Saus 2022.	Devlieghere and Roose 2019; Gibson 2016; Murphy 2023; Khoo et al. 2020; Olaniyan et al. 2020; Saltiel 2020; Skillmark and Denvall 2020; Skotte 2023.	<ul style="list-style-type: none"> <li>– Pragmatic coping with uncertainty despite low control over task environments.</li> <li>– Resilience in the face of inevitable adversities, in part based on collegial deliberation.</li> <li>– Navigating missions by satisficing behaviour and seeking provisional solutions.</li> </ul>

	Evocative case study evidence	Other sources with relevant insights	Manifestations
Transformative agency	Frost et al. 2018; Skillmark and Denvall 2018; Van Veelen et al. 2018.	Avby 2015; Bertotti 2016; Bode and Turba 2020; Khoo et al. 2020; McFadden et al. 2019.	<ul style="list-style-type: none"> <li>– Critical engagement within extant zones of discretion.</li> <li>– Proactive interpretation of an empowerment mission.</li> <li>– Sending messages to the sphere of (local) politics.</li> </ul>

on children's rights, ever vigorous throughout this environment, implies both commitments to 'perfect' service delivery and an 'overriding concern of child welfare professionals to identify high-risk cases' (Parton 2020: 22, dealing with England). Internationally, 'makers' of child protection have been found to perceive how harm avoidance has become the key focus, along with a call for greater transparency concerning effort and results. Moreover, child protection organisations have been encouraged, or obligated, to arrange 'tailor-made care in collaboration with different care-providing organisations' (van Veelen et al. 2018: 426, for the case of the Netherlands), allowing for 'multiple interventions across different sectors of the social services ... system' (Khoo et al 2020: 2106). In addition, there have been pressures to ensure children's formal participation during social intervention processes (Albus and Ritter 2018, commenting on Germany; Seim and Slettebø 2017, for the case of Norway). This has challenged frontline agents who have been found to witness 'intrinsic problems with a family service orientation' under perceived operational constraints (Heimer et al. 2018: 316, with reference to Sweden).

More generally, child protection work seems to be increasingly imbued with a 'rationale that emphasizes ... functional specialisation, delegated authority and proceduralisation' (ibid: 10). Seim and Slettebø (2017), in their multiple case study dealing with user involvement in Norwegian child welfare departments, exemplify how organisational settings have become subject to strong(er) internal segmentation even within a unitary system under municipal control. In the settings under study, the organisational model in use comprises various sub-units, all specialising in different stages of a child protection case – an intake team responsible for assessing notifications related to at-risk children, a department carrying out investigations, units providing in-home services for families and colleagues arranging out-of-home placements. Relatedly, research dealing with the collaboration among distinctive occupational groups has shown that, in the early twenty-first century, child protection work hinges on new forms of internal hierarchies, with some professional groups exerting authority over others (Turba et al. 2019). Moreover, in some jurisdictions, templates for the division of work in this area have drawn a sharp line between investigation and 'broad child welfare services' (Parton 2020: 26, with reference to Anglo-Saxon countries), making many agents concentrate on narrowly defined roles. The implications of all this are manifold and controversial. On the one hand, it seems that the child protection endeavour becomes subject to more fine-grained work arrangements with a potential to make interventions more systematic. On the other, the above reshuffle has been found to



entail procedural fragmentation that undermines ‘holistic approaches within social work practice’ (Ellison 2007: 334, commenting on developments in England and Wales).

Be it as it may, ambitions of public stakeholders to reduce (alleged) redundancy in service provision and to retrace activities in more systematic ways have altered the work environment of child protection services. In recent times, New Public Management (NPM)-inspired approaches to the management of child welfare organisations have sought ‘to improve performance by controlling the detailed operations in the sector’ (Lane et al. 2016: 615), for instance by ‘strict deadlines for assessments applied regardless of the complexity of the situation’ and reviews ‘looking for errors’ (ibid: 618; 619, concerning England). Operations at street-level have been observed to be increasingly ‘usurped by ... legally defined administrative mechanisms’ (Ellison 2007: 340) and standard workflow models (Wastell et al. 2010). These materialise in increased ‘requirements for reporting and documentation’ and ‘demand for standardization’ (see Olsvik and Saus 2022: 473, for the case of Norway). Arguably, the related high level of external scrutiny resembles a double-edged sword. On the one hand, collective agency in related organisational settings receives greater attention by institutional ‘guards’ with an (assumed) interest in effective service provision. On the other, strong formalisation is often viewed as impeding proper service provision, for example by its obsession for paperwork and record keeping (see Gibson et al. 2018, dealing with both the US and wider international developments).

A major vehicle of formalisation has been the propagation of ‘evidence-based practice’, that is, the use of fine-grained instructions concerning the design of social interventions in the light of representative data on ‘what works’ in which classes of cases. Concerning the subfield under review here, this pertains to action capable of combatting child neglect or maltreatment, notwithstanding a high level of ‘social and scientific uncertainty’ regarding causal mechanisms (Lyet 2023). According to Buckley (2017, referring to Ireland), external instructions inspired by this reasoning, as well as their translation into leadership models, have produced a new kind of ‘bureaucratization of child protection work’ (ibid: 83; see also McFadden et al. 2019: 199). In some places, efforts to increase external, data-based administrative control have manifested themselves in a fully fledged ‘metrification’ of organisational processes, concerning decisions on referrals, the respect of timelines and compliance with caseload targets (see Wastell et al. 2010: 314, commenting on England). This has been found to provoke tensions ‘between the need to make quick decisions and the time it took to gather and check information’ (Saltiel 2016: 2111). As Avby (2015: 96) notes, growing ‘trust in research-based knowledge’ in child protection services appears ‘as a response to the increased complexity and unpredictability in many organisations’. Although her study bears witness to a flexible use of methodological innovations (see below), IT systems such as web-based tools for investigating, planning and evaluating work have been found to challenge entrenched habits, particularly in jurisdictions where child protection activities have become subject to an external inspection and monitoring exercise run by safeguarding children boards or quangos (such as the English Office for Standards in Education, Children's Services and Skills – Ofsted).

Combined with (often unannounced) external visits and audits, internal control schemes have been found to constitute more streamlined forms of governance within child protection agencies. Revamped management models seem to collide with long-established self-concepts of social workers who confront the ‘dual task of mediating NPM within child

care and social work whilst reconciling their own professional and personal identities' (Ellison 2007: 335; see also Gibson 2016). Bertotti (2016), exploring child welfare departments in Northern Italy, has illuminated dynamics through which the 'power to decide' (ibid: 7) has shifted from frontline workers to managers concerning judgements about what is necessary for a given child or family. In her eyes, greater sections of the staff have turned into a 'docile workforce', accepting this shift without 'wondering too much about the reasons' (ibid: 9) – besides others who have become detached or 'divorced' agents (see below). Likewise, Ellison (2007: 339) has identified 'disciplinary technologies' at work in UK child welfare organisations, submitting that certain work approaches (e.g., care planning) have become perceived as a 'dis-empowering experience' (ibid: 340). The in-depth case study conducted by Leigh (2019) and dealing with a child protection agency in England suggests that managers trapped in a context of overstretched services and impending budget cuts internalise externally set targets and procedural norms.

Although the observance of formalised prescriptions may reflect 'compliance without conviction' (Wastell et al. 2010: 313), there is evidence of organisational opportunism in the face of altered institutional expectations. Increasing 'pressure for control' has often combined with a 'rationalisation of costs and procedures' to restructure management styles within child welfare organisations (Fazzi 2019: 6, commenting on experience in Italy). One mechanism at play is performance tracking schemes which collate data on time consumption per case or on referrals shaping the trajectory of families or children under custody. These schemes combine with self-control monitored IT-tools (e.g., 'duty trackers' setting distinctive timescales) to create a culture of (symbolic) obedience (Gibson 2016). The latter also affects the processing of transitions from 'emergency intervention' to more light-touch follow-up care (Albus and Ritter 2018, dealing with Germany). IT-based work instruments have been found to make practitioners and entire organisations concentrate on numeric issues (e.g., order fill rates), encouraging a 'focus on targets rather than people' (van Veelen et al. 2018: 412, describing past experience in the Netherlands). This accords well with the observation that focal public agencies or commissioners, as well as service providers, have come to monitor per-case expenditure and to report it back to managers and even caseworkers. As a result, agents tend to gauge a decision's implications in terms of available budgets (Murphy 2023) or to seek options to replace professional intervention by 'light' social support, for instance in community work settings (Bode and Turba 2020, for the case of Germany).

Thus, while being expected to rescue at-risk children whatever it takes, the involved 'makers' of welfare have seen enhanced pressures to consider cost issues when making decisions at organisational level. Public welfare departments have been found to work with shrinking human resources per user, which has reduced capacities for building rapport with clients (Bertotti 2016: 969, referring to Italy). Morris et al. (2018: 367) describe how ensuing 'system pressures', such as rising caseloads and tough timescales, have complicated social workers' 'attempts to engage with the roots of family troubles', impeding them from developing 'holistic understandings of family circumstances through case work' (see also Juhasz and Skivenes 2018, with similar observations). Various studies suggest that resource issues have equally affected non-state organisations that public authorities entrust with child protection work. Under the influence of NPM, many non-profits and voluntary agencies in the child and family welfare field have felt encouraged to develop strategies

for generating revenue and coping with economic uncertainty in a context of quasi-markets and procurement systems. Reported experience suggests a ‘costly process’ of (allegedly) performance-based contracting and related requirements, such as recruiting and training staff (Van Veelen et al. 2018: 412; 417, dealing with the Netherlands). In a context of ‘performance indicators set up by local government’, and in the face of accountability schemes ignoring the complexity of social work endeavour, involved organisations have felt being ‘more government-steered than demand-oriented’ (Tonkens et al. 2013: 172, commenting on the same country). This resembles dynamics observed in Germany (Bode and Turba 2020) where hub agencies (namely, youth welfare offices in local authorities) with a remit to commission services from non-state providers have in some places undermined the traditional, partnership-based procurement model, replacing this model with a contracting-out regime based on formal ‘performance criteria’ and institutionalised distrust (see also Albus and Ritter 2018).

In some studies, such arrangements – which Gibson (2016: 127) deems an expression of neo-bureaucratic governance – have been found to encourage agents to adopt ‘an adherence logic with reference to hierarchical structures’ (Skillmark and Denvall 2018: 93, referring to evidence from Sweden). Research suggests that child protection workers have often seen little leeway in circumventing the pressures depicted above. Leigh (2019), scrutinising a child welfare department in England, describes how the transmission of external prescriptions into internal regulation has destabilised and unsettled relevant professional settings, including with respect to teamwork endeavour. This is confirmed by Frost et al. (2018: 487) who portray typical discontents of contemporary child welfare workers in three Western countries. Besides growing caseloads and a felt lack of recognition within their organisations, employees have been found to bemoan poor workplace support (by peers or in supervision sessions) under extant resource constraints. While such experience appears to twin with low workforce retention (Seim and Slettebø 2017), those employees who stay ‘on board’ are pushed to comply with increasingly rigorous prescriptions – especially when these adversities connect with a culture of blame regarding (alleged) errors in child protection work (Olaniyan et al. 2020: 5).

(B) Beyond such evidence about the implications of institutional prescriptions (and related responses), the wider literature on child protection work also hints at strong *organisational idiosyncrasy* proliferating within the respective sector. This implies not only a (sometimes) limited impact of external interference but also a potential of collective agency within welfare organisations to constrict their accountability to relevant stakeholders. Thus, empirical work conducted during the last decades partially confirms theoretical assumptions about the (relative) power of human service professions (see Subchapter 3.1). One (more traditional) expression of this is persistent paternalism within child welfare organisations (Albus and Ritter 2018, for the case of Germany), that is, collective agency against prescriptions according to which welfare service users (including children and their families) should be considered as co-producers of social support on a level playing field (see Heimer et al. 2018, with similar observations from Sweden). A further symptom of idiosyncrasy is the behaviour of certain professions within the child protection system. These systems are multi-disciplinary and comprise ‘strong actors’ enjoying a high social status (for example forensic doctors and mental health specialists). In the child protection universe, such occupations are often endowed with superior authority when doing referrals

and assessments (see e.g., Cowley et al. 2018). Yet even among non-medical occupations, specific professional perspectives on child protection work coexist. This materialises, for instance, in relations between ‘hub agencies’ and liaising (referring, notifying) organisations from the educational sector or social care occupations (Turba et al. 2019, for the case of Norway).

Moreover, the intricacies of child protection work have often been found to corroborate idiosyncratic practice at street-level. In the context of professional bureaucracies, agents have options to exploit opportunities for ‘self-opinionated’ views about salient problems and appropriate solutions. In a study portraying professionals in a Swedish child welfare organisation, Avby (2015) depicts investigation work as a tentative, muddling-through activity. Exploring reactions on a newly imposed ‘evidence-based’ methodology for interviewing children, her study suggests that responses were fashioned in highly subjective ways. While the tools used for information processing shifted entrenched boundaries in both day-to-day practice and collegial collaboration, major judgements were based on tacit knowledge and under the influence of peers. Entrenched routine hardly changed, with decisions and operations undergoing a process of idiosyncratic sense-making. Child protection workers were observed to ‘put high trust in experience’ (Avby 2015: 97), invoking ‘plausibility and reasonableness to create justified arguments for actions and decisions’ (ibid: 108) – including when this presupposed ‘circumvent[ing] the regulation’ (ibid: 109). A study by Murphy (2023), illuminating the activities of a statutory child protection team in England, echoes this analysis, showing that agents were using a ‘de facto’ discretionary space in situations where incurred (administrative) costs were low and caseworkers felt able to ‘prioritise, or introduce, new pieces of work whilst ignoring others’ (ibid: 9) – regardless of the formal rules their organisation (welfare department) had to respect. Under certain circumstances, caseworkers even operated in an ‘entrepreneurial space outside of the “official” structures of departmental policy’, although this occurred informally, with agents performing ‘practice tasks outside of contracted hours’, ‘taking administrative work home’ or ‘arranging to visit families’ on a private basis (ibid: 12).

Concerning the interaction with fellow organisations, research has shown that interorganisational collaboration in child protection work is not unlikely to be personally bound (Khoo et al. 2020, for the case of Sweden), with involved agents deploying individual strategies when liaising with peers. Likewise, in the interaction with families, caseworkers have been found to make use of private contacts when shaping welfare arrangements for families (Bertotti 2016, dealing with Italy). Further research has illustrated how child welfare organisations try to ‘to gate-keep and ration their responses’ in a context of penury (Buckley 2017: 83; 84, dealing with Ireland). Morris et al. (2018), presenting results from fieldwork across six (more or less deprived) local authorities in England and Scotland, demonstrated how financial bottlenecks in local welfare systems may lead child welfare workers to redefine their core mission, with the emphasis placed on the prevention of extreme harm. The study illustrates that such disengagement from other goals may connect with ‘a punitive narrative’ according to which a typical assemblage of social impediments (poor mental health, addiction and domestic violence) combines inevitably to produce the perception of hopeless cases. In this context, a ‘pathologizing of parental behaviour’, as well as the use of ‘stigmatizing cultural signifiers’ help agents sublimate feelings of being unable to empower children and their parents. From a similar perspective, various

studies have brought to the fore that professional discretion in the child protection sector has become infused with a ‘culture of defensiveness’ (Parton 2020: 24). Thus, Lane et al. (2016: 616) observe that the formalisation of procedures within UK child protection organisations has ‘offered a ready defence against allegations of failure’, driven by concerns of blame avoidance should things go wrong (that is, a child be seriously damaged). This kind of idiosyncratic orientation is often viewed to emanate from a growing ‘preoccupation with ... risk reduction’ in critical institutional environments (Devlieghere and Roose 2019: 209, dealing with Belgium).

More generally, child protection workers, faced with both the above preoccupation and the proliferation of neo-bureaucratic governance, have been found ‘to compromise, conceal, or even defy the expectations that were placed on them’ (Gibson 2016: 127). Wastell et al. (2010), presenting results from fieldwork involving five children’s services directorates in England and Wales, elaborate on workaround practices as a potential response to external pressures in the work settings under study. In their study, caseworkers displayed – among other things – a ‘disengaged ... behaviour produced by obligatory conformance with the bureaucratic regime’ (and related managerial technologies, *ibid*: 316). Many agents continued to exercise discretion by making their own categorisations and individual ‘diagnostics’, sustaining thereby entrenched patterns of collective agency. This also worked by using a professional argot to describe their ‘real work ... beyond the bureaucratic gaze’ (*ibid*: 317). Devlieghere and Roose (2019), exploring child welfare staff’s response to the introduction of new IT systems in Flanders (Belgium), have teased out similar dynamics. Their analysis elucidates the reaction on imposed templates and guidelines for appropriate care, all susceptible to enhancing labour process control. While some agents, overwhelmed by high caseloads and a complex task environment, viewed the new device as stimulating and being informative, others perceived the ensuing formalisation as a barrier to working correctly (e.g., by establishing personal rapport with users). This dovetailed with ‘strategies of resistance, resulting in actions that were invisible’ to others (*ibid*: 214). As Bertotti (2016: 973) notes by referring to research in Italy, such ‘resistance is enacted mainly individually’ and in this sense is rife with personal idiosyncrasy. The study of Bode and Turba (2020) on child protection work in Germany hints at further attempts to deviate from felt obligations. Under pressure, staff were found to resort to deflection strategies in the encounter with other agencies (schools, mental health services etc.) – including the devolution of activities on less professionalised settings, for instance in the field of early childcare and early education (see also Khoo et al. 2020). Such strategies can be associated with a propensity to level charges against co-actors from the child and family welfare universe, ‘as a way of asserting ... identity ... and collegial competence’ (Saltiel 2016: 2111). Thus, collective agency in child protection organisation has been shown to be infused with tendencies towards reframing an incumbent public mission and delimiting an organisation’s turf.

Further field research suggests that, under certain circumstances, idiosyncrasy also coincides with despair, ‘inner resignation’ and instrumental (egocentric) behaviour – particularly in situations where agents struggle hard with keeping work complexity under control (Khoo et al. 2020). Thus, social workers have been found to become disengaged within ‘an organisation characterised by a firmly increasing work rate and administrative duties’ (Skillmark and Denvall 2018: 93, referring to Sweden). With a reduced ‘sense for

satisfaction' (Lane et al. 2016: 615), such disengagement may feed into actions of camouflage, compassion fatigue and cynicism. As child protection staff have been found to feel 'routinely blamed when things went wrong' (Saltiel 2016: 2110, concerning England), workplace anxiety is a potential outcome. This sentiment has been found to induce low staff morale and problems in recruitment or retention of skilled employees (see Lane et al. 2016: 614). Even in contexts where institutional pressures seem less pronounced (e.g., in Nordic countries), strategic behaviour has been found to thrive among the staff. This, for instance, holds for agents avoiding pro-active collaboration with higher-order agencies in child welfare networks, sensing a hierarchy of knowledge and bureaucratic power that makes them develop an instrumental approach to networking (Turba et al. 2019). Instrumental orientations also occur where child welfare services are provided by private businesses (which has become an issue in some Western European countries, see above). While these businesses often claim to achieve profit margins by better quality outcomes compared with competitors from the non-profit and public sector, economic interests tend to override concerns for such outcomes in many places. Commercial service delivery can be regarded as a distinctive form of 'organised' idiosyncrasy as it seems to entail discrepancies between a child welfare organisation's official mission and its actual behaviour (Jones 2015; Meagher 2016). All in all, then, child protection work can be fraught with idiosyncrasies in various instances – whereby regulatory frameworks and underlying agendas become 'disabled' in important respects.

(C) A good deal of research into child protection has shown that, given their task environment, professionals from the child protection sector always need to carve out their own way(s) when doing their job in tune with the mandate of their organisation. Deviations from regulatory norms seem unavoidable in making things run smoothly and when responding to adversities related to child well-being in the social fabric of modern Western societies. This observation, tallying with key assumptions in the scholarship on street-level bureaucracy, sometimes comes with a sceptical undertone concerning the potential contribution of welfare organisations in the respective sector. Thus, Parton (2020: 29) notes that, in his view, these organisations have to 'operate quite independently of the social problem which is assumed they trying to respond to'. While this conjecture may underestimate the impact of social intervention in many cases, there is evidence suggesting that child protection work can often be equated with *conservative (collective) praxis* in the sense that, by seeking pragmatic solutions to wicked problems, organisational activities concentrate on (re)stabilising a precarious social situation (in family life or in a child's life trajectory) without tackling the causes of child neglect and maltreatment in more fundamental ways.

At least, research has shown that child protection organisations in Western Europe are permanently occupied with managing uncertainty while having low control over the very process triggered by their intervention. In this context, Bertotti's field study in Northern Italy signals a permanent gap between talk and action in child welfare organisations, with caseworkers performing behind the scenes when turning their mission into practice (Bertotti 2016: 970). Saltiel, dealing with social work teams in England, shows how these teams are involved in 'arguments and dilemmas over where thresholds for intervention lay' (ibid 2016: 2110). His study portrays examples with agents filing 'unofficial' responses to felt constraints at the street level, for instance concerning timelines or formal procedures. Besides deploying a gate-keeping behaviour (that is, accepting only the most pressing

tasks), caseworkers were found to keep thresholds for intervention high and to reduce activities deemed unnecessary for preventing high-risk situations (ibid: 2105). Faced with unreliable or incomplete information and poorly defined or fluid situations, they used a tool-kit that ‘does not figure in official accounts of social work’ (ibid 2114) while being effective in performing the most essential tasks. A similar message is conveyed by the previously mentioned study by Murphy (2023). The dynamics uncovered by his study demonstrate the self-referential character of child protection work, yet they also reflect functional requirements to deal with when extant rule-sets do not, or cannot, specify which action should be undertaken. Murphy refers to this as ‘de jure discretionary space’ associated with the unpredictability of service users as well as unforeseeable scenarios in the day-to-day practice of child protection casework (ibid: 7).

In a study on home visiting by social workers in England, Ferguson (2018) reveals how individual agency and teamwork can be perceived as a ‘sensory and mobile experience’, prompting ‘craft and improvisation’ in many instances (ibid: 66; 67). This holds notwithstanding the increase of formal prescriptions (e.g., standardised assessment frameworks) in recent times, related to the ‘technical-rational imperatives of guidance, audit, and managerial surveillance’ (ibid: 68). As Ferguson nicely puts it, social workers simply ‘have to “make” their practice’ given the ‘flow and flux of family life’. His investigation illustrates how staff may work in spaces of normlessness, faced by the need to wrestle with complex situations under conditions of uncertainty. This feeds into a muddling-through behaviour to complete basic tasks in line with their organisations’ general mandate, although this strategy can at times be ‘disruptive of the conditions required to conduct meaningful social work’ (ibid: 69).

In their research on Norwegian child welfare managers, Olsvik and Saus (2022) have observed similar dynamics. Respondents commented that a major challenge for their organisation consisted of navigating between short-term objectives and strategic development in a context in which pragmatic requirements had to be balanced with professional considerations. Juggling with formal procedures, managers expressed the feeling that their organisation had become absorbed with ‘doing things right rather than doing the right things’ (ibid: 477). However, it was clear to them that this was ‘business as usual’. The authors refer to this as the ‘paradox of performing’ in situations where action must be taken under tensions ‘between demands ... for standardization and individual adjustments’ (ibid: 474). Importantly, such processes are often performed by a ‘worker collectivity’ which mitigates encountered complexities, as Skotte (2023) demonstrates in her study on frontline child welfare offices in the same country. The professional teams she shadowed in their day-to-day work not only embarked on regular deliberation on opportunities for pragmatic problem-solving but also agreed on a line of action when ‘structuring ambiguity and uncertainty into manageable tasks’ and ‘making the work bearable by assigning responsibility’ (ibid: 515; 510) to co-actors, including those outside of their organisation.

Findings from Skillmark and Denvall (2018) echo this characterisation of pragmatic child protection work. Their study, dealing with Swedish organisations, illuminates how the latter is performed under conditions of a permanent ‘conflict between professionalism and standardisation’ (ibid: 90). Exploring responses to the introduction of new IT tools, the investigation portrayed employees searching for feasible solutions to challenges posed by their complex task environment. Problems were resolved by a flexible use of

these tools, which had originally been established to streamline casework processes. Staff using the tools were found to disregard built-in prescriptions when these were perceived as misleading or overly time-consuming. Similar observations have been made for child protection organisations in Belgium (Devlieghere and Roose 2019) and England (Saltiel 2016). Saltiel describes how information contained in computerised recording systems was ‘carefully interpreted and turned into coherent narratives’ – even though the latter remained contested (ibid: 2116). This exemplifies that, at many instances, child protection work performed in twenty-first century welfare organisations cannot be but pragmatic in the sense that agents must draw their own conclusions from the situation they encounter and find solutions on what to do short-term (Avby 2015: 105). Bode and Turba (2020) largely accord with this in their German study on collective agency in both hub organisations of local welfare authorities and non-state service providers commissioned by the former. Their study elucidates a permanent ‘cognitive hassle with conflicting demands’ (ibid: 25), as agents felt themselves exposed to the multiple challenge of meeting the most substantial risks, controlling costs without collateral damage and working smoothly with ‘capricious’ fellow organisations. Caseworkers often sought ad hoc solutions in line with what was expected from them in formal terms, displaying a kind of satisficing behaviour. With ‘permanent indecisiveness and clueless collective improvisation’ (ibid: 10), collective agency seemed to be condemned to make the ‘show go on’ – with this being amenable to ‘schizophrenic sense-making’ in many instances.

All these routines bear witness to vast opportunities for involved agencies to ‘do their job’ without solving problems in sustainable ways. On the staff side, such ‘conservative’ praxis presupposes some level of resilience, given that agents must ‘function’ while being confined to improvisation and facing limits to child or family empowerment. Studies from Norway suggest that collegiality can be an important ‘stabiliser’ here, as supervision, debriefings and other forms of peer interaction contribute to making this burden bearable (Skotte 2023) and reduce ‘the likelihood of occurrence or the effect of exposure to negative workplace experiences’ (Olaniyan et al. 2020: 12). While organisational arrangements (such as workload, control instruments workplace climate) impact upon related opportunities, the ‘meaning applied to the job and the impact on service users’ lives’ seem to be key to building resilience (McFadden et al. 2019: 213, dealing with Northern Ireland). Leadership has been found to matter greatly in this context. McFadden et al. (2019), drawing on survey data on the child workforce in Northern Ireland, imply that equilibrated internal relationships not only buffer the impact of stress, attrition and frustration, but also provide agents with opportunities to build long-term resilience (ibid: 201). However, Gibson (2016), presenting case study evidence from England, suggests that leadership in welfare organisations may also resort to strategies of shaming and praising, including the use of league tables for comparative performance assessments. Either way, leaders in child protection settings, seeking ways ‘to concurrently stabilize’ collective agency therein (Olsvik and Saus 2022: 474), have been found to make their organisations function smoothly despite their dilemmatic mandate.

(D) Beyond being places for improvisation and navigating dilemma-ridden processes, child protection settings may also exhibit zones for *transformative (collective) agency*. This is a message conveyed by (multiple) case studies that illuminate activities geared towards (re-)shaping the conditions for child protection work in more strategic and pro-



grammatic ways. Related activities also include attempts to contest certain forms of external interference into a given setting. While echoing the above observation of pragmatism, some research on organisational behaviour in the child protection universe hints at creative activities which are prone to alter entrenched structural conditions and reflect a welfare organisation's potential to adjust the character of their mandate in tune with the agenda of child empowerment. Frost et al. (2018) show how child protection workers in Italy, Sweden and England may pursue this agenda proactively while braving difficult working conditions throughout their sector. Their research indicates that workers can keep commitments high, notably by maintaining engaged copying styles and a dispositional goal orientation which stresses the malleability of competences and motivations to improve daily practices. Considering their job as a "'mission" they love', many seem to develop a 'sense of being effective' (ibid: 491; 492).

Studies pointing to the 'constructive' capacities of child welfare organisations suggest that this proactive interpretation of incumbent missions concentrates among certain groups of agents. Skillmark and Denvall (2018), describing efforts to implement a new needs assessment tool in Swedish child protection services, identified 'transformative standardizers' among the affected workforce. They found leaders committed to 'encourag[ing] social workers to transform' this tool, 'according to the ways they themselves view and reason about social work' (ibid: 8). The authors attributed related organisational behaviour to the influence of 'occupational professionalism' within these services, that is, work attitudes which espouse classic ethical convictions and claims for high discretion in human service work. It seems that, under certain circumstances, such orientations can make agents tone down the adherence to (neo-)bureaucratic prescriptions or fit the latter into their personal agendas. Even under difficult circumstances (like those listed above in the first line of Table 12.1 above), child welfare departments have been observed to leave room for 'critically engaged' social workers who combine 'strong commitment to the organisation with critical thinking focused on clients' (Bertotti 2016: 971), for instance when suggesting innovative procedures. Other research has shown how 'professional discretion could be used to oppose guidelines' deemed alien to a given mission (Khoo et al. 2020: 2108, for the case of Sweden), once the context of legal frameworks gives them some leeway in this respect (Avby 2015).

More generally, child welfare settings in twenty-first century Western Europe have been portrayed as exhibiting 'reflective properties of a learning organisation' (Lane et al. 2016: 620, referring to England) – which implies that collective agency in and around relevant settings has a potential to change the 'state of things' regarding both the life conditions of target groups and organisational abilities to deal with a demanding task environment. This seems particularly evident in contexts where the external pressures portrayed above are 'softer', for instance after amendments in the regulatory framework which involve less 'hard timescales for assessment' (see Lane et al. 2016: 620, observing this trend for England). Transformative orientations have been found to thrive where regulatory frameworks animate child and family welfare organisations to a more solution-focused agency, with external stakeholders (public authorities) putting their faith into organisational expertise as a critical factor for the development of both families' and social workers' abilities to look after children (Parton 2020, arguing that this attitude prevails in some child protection systems). Such conditions have been found to facilitate an individualised decision-making

which prioritises the continuity of social support even under NPM-like governance schemes, that is, policies geared towards reducing subsidy rates, the contracting-out of classic services and managerial efforts to bring costs down. Ellison (2007), referring to case study evidence from Denmark, suggest that such conditions can arise from a ‘partnership logic’ pervading the orchestration of child protection services, including the encounter between professionals and at-risk children or their families. Similar observations have been made in a Dutch case study (Van Veelen et al. 2018). Dealing with a management reform launched by a local authority, this research reveals the potential implications of a more self-managed mode of child welfare provision, by the help of what is sometimes labelled a post-bureaucratic steering approach. The study found ‘a new professional’s tenacity’ (ibid: 431) subsequent to the introduction of a management model centring on what was referred to as purpose-driven and strength-based social care. With the organisational encouragement of ‘craftmanship’ (ibid: 416) and constant supervision, caseworkers were found to develop both reflective and proactive attitudes towards their job, although some seemed to relapse into old routines after a while. In this case, the stimulus for change emanated from superior levels of public administration, yet it seems that it set free capacities for transformative agency at the street level of the child protection universe.

Related orientations may also underpin strategies by which certain ‘makers’ of welfare tackle institutional environments at the local level. This is suggested by Bode and Turba (2020), dealing with the evolving child protection sector in Germany. Their study illuminates initiatives by which public sector staff sought to transform policy agendas of regional public authorities. One strategy consisted of arguing with superior administrative units or government officials during the budgeting process, with a concern ‘to enrich the language of figures and numbers with “content” and raise “comprehension” for the intricacies of their everyday practice’ (ibid: 23). In addition, agents were found to build working parties bridging organisational boundaries with the aim of both discrediting the NPM-led governance approach trumpeted by local politicians and defending alternative concepts for the arrangement of child protection work. Thus, collective agency in child welfare organisations can send out rays to the political hemisphere, that is, administrative bodies which determine the wider circumstances under which these organisations operate. Under certain circumstances, such activities may also spawn an alternative programmatic discourse of professional associations or lobby groups in their encounter with policy-makers. Hence, social innovation in organised welfare provision may emerge from within the latter’s infrastructure, even in a context shaped by strong institutional environments and a complex task structure.

## 13. Making work decent (again)? The organisation of active inclusion efforts

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As pointed out in the Part III of this book, Western European societies have established multi-faceted organisations involved in work (re-)integration programmes. Over the last decades, these organisations have developed under a common agenda, despite numerous differences both within a given national territory and across welfare state boundaries. This agenda is fuelled by a transnational shift in the orientation of labour market policies, as highlighted earlier in this book. Driven by the mantra of active inclusion (or welfare-to-work), organisational mandates go beyond income replacement, the enforcement of labour law and preserving decent working standards. In the new millennium, organisations in this welfare sector orchestrate or provide human services to a much greater extent than in former times. In the core of labour market administration, bureaucratic functions – such as eligibility checks concerning income replacement, payment orders, information about adequate job openings – have persisted, as have light-touch placement services targeting short-term jobseekers. That said, the management and running of active inclusion programmes have become important issues within this universe. Extant programmes assign variegated roles to different organisational settings, in accordance with the (official) policy objective to open up new prospects for jobseekers with limited ‘employability’. It holds true that the welfare-to-work agenda looks ambivalent in that it may not necessarily help relevant target groups find decent work (again). Structural conditions in the labour market, as well as restrictive regulatory frameworks, may make this objective difficult to attain – which has certain implications for collective agency in this arena (see below). That said, European welfare states have developed a ramified infrastructure concerned with ‘processing’ and changing the situation of citizens who are unemployed or have difficulties in finding an in-work progression route. Practical operations are run in a multi-coloured organisational landscape, which also includes providers of rehabilitative services (see Sama 2017; Blonk et al. 2020, Scholz and Ingold 2021). Hence, under certain circumstances, collective agency within this infrastructure has a potential to make work decent (again).

The focus of what is presented hereafter centres on casework in agencies providing orientation and benefits (jobcentres etc.) on the one hand, and job promotion measures and subsidised employment within specialised organisations for benefit claimants (welfare-to-work providers), on the other. Before embarking on the scoping review exercise announced above, it (once again) appears reasonable to take a closer look at the nature of activities in this wider realm, especially those which target those who are other than occasional jobseekers. In their portrayal of active inclusion schemes in Sweden, Germany and Italy, Heidenreich et al. (2014) picture the transnational character of the mandate given to organisations in this universe. Pursuing ‘the activation of minimum income and employment benefit’, this mandate consists of activities aimed at motivating, or compelling, jobseekers ‘to participate in public job creation schemes,

job search activities and training courses' (ibid: 183), along with further 'enabling' support in terms of human services. In essence, two types of interventions are prominent here, namely employment services (at different levels) and job promotion measures (of various kinds).

In general, three characteristics of these interventions appear outstanding. A first striking feature is the diversity of the active inclusion workforce (for many, see Caswell et al. 2017). In general terms, the involved labour force is entrusted with case management tasks – regardless of where related activities are located. The shop floor may be an employment service, municipal welfare department or non-state organisation, including quasi-independent public enterprises. Social workers are involved only in some of these settings, mostly at local authority level (see Bergmark et al. 2017; Dall 2020; D'Emilione et al. 2021). Social work is much less widespread in employment services where most agents have a different occupational background, for instance in public administration (Gottwald and Sowa 2021, for the case of Germany). Organisations running welfare-to-work schemes equally involve agents with different profiles, including laypeople, volunteers and staff trained in business administration. A common, overarching characteristic of the active inclusion workforce may be a commitment to 'people-oriented strategies' (see Signoretti and Sacchetti 2020: 546, for the case of social enterprises in Italy). McDonald and Marston (2005: 374) maintain that organisational agents are expected to translate welfare programmes into a 'relationship between the case manager and his or her client'. This pertains to advice and placement activities of employment services and welfare-to-work providers alike, with the latter being committed to empowering disadvantaged workers and embedding them 'back into socially cohesive lives' (Aiken and Bode 2009: 212, considering the UK and Germany).

A second trait of the active inclusion landscape internationally is the (otherwise) heterogeneous and complex character of the accomplished activities. One organisational task consists of influencing the mental state of a variegated clientele. This is an essential observation in the literature dealing with what is often encapsulated in the notion of 'activation work' (van Berkel and van der Aa 2012). Similar to child protection services, related operations are suffused with indeterminacy concerning the relationship between interventions and outcomes. Tasks are complex because legal frameworks (e.g., those forcing benefit claimants into welfare-to-work measures) and environmental conditions (notably the shape of contemporary labour markets and employment conditions therein) tend to make work (re-)integration an uphill battle in many instances. The range of activities in this (sub)field of organised welfare provision proves to be diverse and dynamic. Concerning employment services (writ large), one central remit consists of assessments of both employability (work capacity) and benefit eligibility, which may involve decisions to deny or cut the latter. Furthermore, besides typical placement activities, job search monitoring is a fundamental feature of employment services in twenty-first century Western Europe. This is pursued through various instruments, such as action plans and personal inclusion contracts, attendance reports, lists of activities accomplished by jobseekers, and staged follow-up meetings. All this requires operational flexibility and preparedness for devising individually tailored interventions (Jacobsson et al. 2020: 320). Among other things, caseworkers may assign (long-term) jobseekers to 'activation' measures. These comprise job-application courses (e.g., CV-writing), 'soft skill' and vocational training, subsidised (temporary) employment or work experience opportunities (whether compulsory or voluntary). Under an active inclusion scheme, jobseekers may also be referred to social care services, for instance specialists working with drug addicts, treating mental health conditions

or offering ‘budget coaching’ – sometimes under the same organisational umbrella (see e.g., Brandt et al. 2021, for the case of Flanders).

Depending on the remit and work role of involved agents, either administrative or human service elements may prevail. Relevant operations may have disciplining or enabling dimensions, even when decisions are driven either by short-term or long-term perspectives. Where the mission consists of both assessing a jobseeker’s eligibility to welfare benefits and managing a work-integration trajectory, social support and control go hand in hand. Caseworkers may be led to sanction their clientele in the event of non-compliance while, at the same time, acting as “‘gatekeepers” to enabling instruments’ (training schemes etc., see Senghaas et al. 2019: 618). To perform this complex agenda, agents may (have to) draw on social work technologies (Gottwald and Sowa 2021), such as establishing rapport and building trust. In doing so, they may need to elicit delicate information from users, including about ‘care responsibilities, health conditions, work-related attitudes, and factors that may interfere with employment’ (Senghaas et al. 2019: 620), such as the jobseeker’s motivation, social background, educational experiences and state of health (Braun and Christensen 2020: 8, referring to government guidelines in Denmark). In all these dimensions, the involved labour force – frontline workers in employment offices, municipal welfare departments or specialised agencies with a public mandate – performs interactive human service work. This may also include referrals of users to external service providers or the orchestration of a work-integration trajectory involving various other organisations.

On their part, welfare-to-work providers carry out casework as well, albeit on a smaller scale in many places. Their staff may become entrusted with conducting coaching talks or assessing a jobseeker’s training and work experience (Ennerberg 2020; 726, dealing with services for migrants in Sweden). Elsewhere, personal support on an in-work progression route (e.g., within a work integration social enterprise) is often provided in more of a hands-on fashion (see Baraibar-Diez et al. 2019). Involved (frontline) staff also liaise with other organisations and actors from the (sub)field, sometimes in more institutionalised ways (see Bergmark et al. 2017: 555, mentioning a special boundary-spanning ‘platform’ for this in Sweden). More generally, many frontline workers involved in active inclusion programmes deal with both ‘conflicting definitions of problems and the negotiation of solutions’ (Nothdurfter 2016: 421). Although their activity is pre-structured by regulatory frameworks – which have become stricter and more standardised over time (as depicted in Chapter 8) – the related decision-making generally involves the evaluation and treatment of individual cases. This implies that their job profile often contains discretionary space. Many employees operate as ‘situated agents’ (ibid: 424) urged to find practical solutions to complex problems. Frequently, their ‘professional responsibility concerns both what is to be done and how it should be done’ (Dall 2020: 82, referring to active inclusion teams in Denmark).

A third characteristic of the universe in question is what Nothdurfter (2016: 421) has termed the ambiguity of active inclusion policies throughout twenty-first century Western Europe. According to this author, such ambiguity is engrained in the mandate that the two types of organisations considered above receive. Over the last decades, tasks have often become imbued with the rationale of ‘self-sufficiency through ... own efforts’, even as a major purpose of casework consists of preventing users ‘from becoming habituated to welfare’ (Bergmark et al. 2017: 549–50). Concerning jobcentres, this orientation comes with ‘an incentive to keep costs low’ (Braun and Christensen 2020, referring to Denmark). Following Baker Collins

(2016, commenting on a Canadian income assistance programme), caseworkers embedded in this welfare-to-work culture are often expected to act as control agents in the first instance. This expectation may feature ‘competing priorities and contradictions’, given that formal prescriptions contain inconsistent objectives such as encouragement and sanction, or short-term results and long-term integration. As ‘standardised rules ... do not work in non-standardised situations’ (ibid: 224; 231), many caseworkers must find wiggle room and space in the rules. This also applies to the implementation of benefit conditionality in an employment service setting, given the parallel agenda of support and oversight (Senghaas et al. 2019). In many instances, case management requires an active participation of users who however may voice concerns that sit uneasily with the work-first orientations instilled in contemporary policy frameworks (see also Kaufmann 2020, depicting the situation of job advisors in the UK ‘Work Programme’). Hence, as van Berkel et al. (2018: 5) note, ‘opposing elements’ co-exist in active inclusion schemes and ‘give room for variation in policy delivery at the frontline’.

Related tensions may spill over to welfare-to-work providers, that is, undertakings running job promotion measures, including charitable initiatives, non-profit organisations bound to a social enterprise approach and private firms commissioned for such measures. Working with users in a context of subsidised employment, vocational training or jobsearch assistance, the mission statement of many of these organisations comprises a commitment to create opportunities for social inclusion. At the same time, purchasers tend to impose their own priorities on partners that receive funding from them (Jones 2019). They may, for instance, resort to work integration enterprises with the intention of preparing users for a rapid transition to poor-quality jobs or for inculcating behavioural habits, such as professional appearance and punctuality at a workplace – whereas many non-profits in this field pursue more ambitious projects (Aiken and Bode 2009; Sama 2017; Bandini et al. 2021). Caseworkers in private firms may feel compelled to contribute to profit-making while simultaneously being bound to work (re-)integration targets. A further source of ambiguity resides in the fact that mandates appear highly formalised and diffuse at the same time. In many of the welfare-to-work schemes established during the last decades, inputs and outputs are specified (payments, deadlines, numeric objectives such as placement rates) whereas the throughput is replete with imponderables. From the perspective of service providers, imperative ends meet erratic means, given both the vulnerability of users and constraints inherent in capricious economic environments. For instance, social enterprises in the field under study have frequently come to depend on fixed-term public sector contracts and volatile markets for goods and services traded by them (recycling and second-hand business, cleaning work etc.). The ensuing uncertainty creates a ‘muddling-through agenda’ (Bode 2013) that may collide with the ‘noble’ objectives contained in both their mission and active inclusion programmes.

The subsequent paragraphs condense findings from (multiple) case studies that shed light on the role of collective agency in the above-mentioned welfare sector. The focus lies on the basic components of the sector’s tool-kit, that is, case management in employment services and job promotion measures. As with the analysis of organised child protection mentioned above, the evidence is inferred from a ‘quasi’-scoping review of the recent (Western European) literature and will be presented by referring to the four research categories that are listed in Table 13.1.

Once again, this table contains a list of publications that show evocative cases, a set of further pertinent sources, and key observations spelled out at greater length below.

(A) Recent studies on organisations involved in active inclusion programmes suggest that a stricter *compliance with (evolving) external prescriptions* has become a pressing concern in the field under study. Similar to child protection work, there are two sides to the coin when considering the potential effect of institutional prescriptions. On the one hand, the reform agendas of the last decades reflect firm welfare state commitments to make services (more) effective, with this concerning, for instance, the access to further training or the orchestration of job search assistance. On the other hand, studies describing recent developments in this welfare sector suggest that the instruments in use are not necessarily geared towards providing what most jobseekers aspire to, that is, decent work and a self-determined career track. Thus, employment services and social welfare departments with a mission to orient jobseekers with special impediments have been found to use specific templates imposed by central government or national quangos, alongside a partial outsourcing of the work (re-)integration endeavour. These templates, meant to streamline processes of service provision, are often expected to ensure a peremptory implementation of the ‘work-first orientation’ (Heidenreich et al. 2014: 190) portrayed earlier in this book. Scrutinising such processes in Germany, Denmark and the UK, Greer et al. (2018, chapter 5) illustrate how related policy frameworks intersect with altered organisational design throughout the sector. In many instances, case managers in employment services have been led to live with both short-term placement goals and a more systematic monitoring regarding their fulfilment. Jobcentres have been found to chase (numeric) targets while funding for welfare-to-work services has adopted a pay-for-performance mode (that is, fees-for-service arrangements) in many places. As Nothdurfter (2016) demonstrates for the case of employment services in Vienna (Austria), pressures to achieve targets may connect with heavy caseloads and a lack of time for dealing with users in a personalised way. In his study, he found frontline practitioners feeling urged to ‘devote energy in generating appearances of responsiveness’ (ibid: 432). Likewise, Gottwald and Sowa (2021), presenting case study findings on employment services in Germany, suggest that, in the context of the regulatory framework introduced during the 2000s, agents were led to obey a (work-first) rationale that replaced the previous (corporatist) concept of protecting the occupational and socioeconomic achievements jobseekers had made in their career thus far. Under a ‘comprehensive target and management system’, these agents, expected to implement the new policies, were found to adopt a distinctive social work attitude to facilitate the case management process, albeit in line with the above rationale (ibid). In the context of a highly formalised street-level encounter, they had to cope with bureaucratic templates assigning job claimants to ‘customer profiles’ and standardised job search tools, along with a tough performance measurement scheme focusing on achieved job placements.

McGann (2022), presenting evidence from Ireland, sheds light on the mechanisms by which the above management systems may enforce collective agency in accordance with tough welfare-to-work policies. Following a wide-reaching governance reform in this country, local employment services and active inclusion programmes were transformed into a procurement model obliging the involved organisations to deliver according to standardised benchmarks (notably, placements in jobs and training measures). This arrangement

Table 13.1 Condensed scoping review related to organisations involved in active inclusion schemes

	Evocative case study evidence	Other sources with relevant insights (employment services in italics)	Manifestations
Compliance with external prescriptions	<i>Haikkola 2019;</i> <i>Paulsen 2018;</i> Scholz and Ingold 2021.	Aiken and Bode 2009; Bennett 2017; <i>Bergmark et al. 2017;</i> Ennerberg 2020; Dufour et al. 2022; <i>Greer et al. 2018b;</i> Kostilainen and Pättiniemi 2016; Kaufmann 2020; Levander 2017; McGann 2022; Penz et al. 2017; Sama 2017; Signoretti and Sacchetti 2020; <i>Gotwald and Sowa 2021;</i> van Parys and Struyven 2018.	<ul style="list-style-type: none"> <li>- Streamlined service provision according to imposed templates and targets.</li> <li>- Staff adopting hegemonic views from outside.</li> <li>- Implementation of mandated control functions.</li> <li>- Welfare-to-work providers obeying external norms.</li> <li>- Service delivery contingent on environmental conditions (public policies/markets).</li> </ul>
(Latent) idiosyncrasy	Kaufmann 2020; Pfeilstetter 2020; <i>Ybema and Horvers 2017.</i>	Arenas et al. 2021; <i>Braun and Christensen 2020;</i> <i>Clouet et al. 2022;</i> Greer et al. 2018b; Künzel 2012; Knuth 2020; Kupka and Oslander 2017; Nothdurfter 2016; Heidenreich et al. 2014; Penz et al. 2017; Sealise 2020; van Parys and Struyven 2018.	<ul style="list-style-type: none"> <li>- Strong role of local constituencies, stakeholders and concepts.</li> <li>- Relevance of individual interaction styles and judgements at street level.</li> <li>- Passive resistance, detachment and disaffection as a reaction to formal instructions and oversight.</li> <li>- Self-reference of welfare-to-work providers (for/nonprofit).</li> </ul>



	Evocative case study evidence	Other sources with relevant insights (employment services in italics)	Manifestations
Conservative praxis	<i>Jacobsson et al. 2020</i> ; Khoronzhevy-chaand and Fadyl 2022; <i>Senghaas et al. 2019</i> .	Arenas et al. 2021; Bakkeli 2022; Bandini et al. 2021; Barabar-Djez et al. 2019; Blonk et al. 2020; Betzelt and Bode 2022; <i>Clouet et al. 2022</i> ; Dall 2020; Greer et al. 2019; Jones 2019; Kostilainen and Pättiniemi 2016; <i>Gotwald and Sowa 2021</i> .	<ul style="list-style-type: none"> <li>- Search for a balance between the supporting and regulating elements of policies.</li> <li>- Focus on realistic options for 'nested' active inclusion work.</li> <li>- Shift of tasks to co-actors to mitigate (felt) inconsistencies.</li> <li>- Welfare-to-work services adapted to given opportunities.</li> </ul>
Transformative agency	<i>Brandt et al. 2021</i> ; Schulte et al. 2018; Jones 2019.	Aiken and Bode 2009; Arenas et al. 2021; Dufour et al. 2022; <i>Nothdurfter 2016</i> ; Lindsay et al. 2019; <i>Künzel 2012</i> ; Tracey and Philipps 2016; <i>Paulsen 2018</i> ; <i>Ybema and Horvers 2017</i> .	<ul style="list-style-type: none"> <li>- Informal agency to bend imposed agendas.</li> <li>- Advocacy behaviour and network strategies.</li> <li>- Use of professional/organisational authority and militancy to revamp public policies.</li> </ul>

*Note:* Employment services/welfare departments are shown in italics.

made street level bureaucrats ‘subject to tighter management control’ and pay ‘attention to the income they generated by placing clients’ (ibid: 80–81). The underlying ‘regimes of contracting-by-results’, McGann notes, tend ‘to discipline ... caseworkers by instilling fear and anxiety among organisations’ that are entrusted with the implementation of job promotion measures (ibid: 85). Similarly, employment service agents in Sweden have been found to be forced into ‘run-of-the-mill jobs’ featuring a ‘multi-faceted real-life obedience to managerialist norms’ (Paulsen 2018: 365–6). Paulsen’s study suggests that institutional prescriptions (the implementation of a welfare-to-work framework) have revamped the agents’ classic task environment (job matching), shifting their attention towards ‘passing around the long-term unemployed and the juvenile to different labour market programs’ (ibid: 366). The transmission belt for this were goal standards for subcategories of job-seekers, adjusted to performance benchmarks mapping results achieved in the past. While this induced different moods within one and the same organisation (including despair, cynicism, stoic defeatism etc.), some agents appeared to be ‘seduced’ by the new regime. Others stressed ‘the importance of being positive’, defending the work-first approach in pragmatic terms and being keen to get ‘the work done’ (ibid: 371), while sharing ‘a sense of having to perform tasks, reproduce workfare programs, and satisfy ever-changing audit systems’ (ibid: 379).

Brandt et al. (2021), displaying evidence inferred from interviews and observations in Belgian public welfare departments, portray social workers entrusted with active inclusion tasks as carriers of an ideological ‘welfare agenda’ driven by the workfare perspective. Part of the workforce believed in a ‘culture of dependency’ thriving among their clientele. This led them to compose integration contracts through which users were redirected towards public works or charitable organisations providing employment experience – often in line with what the authors refer to as a managerialist ontology (ibid: 78). Further interviewees stuck to an education perspective based on a self-help agenda engrained in individual support plans which led caseworkers to assign ‘homework’ to certain jobseekers, according to the concept of behavioural conditionality. Scholz and Ingold (2021), drawing on accounts of jobseekers with mental health conditions and their experience with the UK ‘Work Programme’, equally demonstrated that employment advisers involved in this scheme had internalised the programme’s deeper logic. Related collective agency was geared towards making users comply with the work-first rationale stressed by both the government and non-state organisations under public contract. According to the authors, this came with ‘erroneous assessment of work capacity’ (ibid: 1626) and a neglect of individual situations, since the bulk of users were classified as jobseekers with an ideal state of body and mind, with no other responsibilities outside the Programme, and constantly ‘capable of adapting to the terms of benefit conditionality embedded within it’ (ibid: 1614). This kind of conformity to regulatory norms seems to be rooted in pay-for-performance models that prompt quick decisions and one-size-fits-all solutions. A similar message is conveyed by Haikkola (2019), presenting evidence on public employment services in Finland and their treatment of young jobseekers. When it came to animating a claimant’s job search behaviour, collective agency seemed to be imbued here with both an authoritarian spirit and the imaginary of self-governing users. Her study portrays the street-level practice of frontline caseworkers as being ‘aimed at exerting control over the young client’s plans, use of time, and actions, with a particularly short-term focus’ and activation

being viewed as ‘an end in itself’ (ibid: 343–4). Penz et al. (2017), summarising evidence from a multiple case study in German, Austrian and Swiss jobcentres, concur with this observation. Their study reveals how employment service agents may become involved in settings of ‘entrepreneurial governance’ (ibid: 549) and have tendencies to patronise jobseekers, which includes the shaping of street-level encounters in (emotionally) manipulative ways. The previously mentioned study of Gottwald and Sowa (2021) corroborates this observation insofar as it illustrates how jobcentre agents in Germany have been led to employ coaching activities and social-work style communication strategies in order to elicit information needed to execute their welfare-to-work mandate – for instance when it comes to initiating a placement process and making jobseekers comply with this mandate via an ‘integration agreement’. While the authors found the respective agents interested in defending ‘discretionary authority’ within their organisation (ibid: 213), collective agency therein appeared impregnated by a target-based accountability regime in which numeric assessments and cost forecasts set the tune (ibid: 209), including when it came to the commissioning of welfare-to-work measures from external providers.

A similar account is provided by van Parys and Struyven (2018) in a study delving into active inclusion practice in Flanders (Belgium), with a focus on the caseworkers’ role in monitoring and sanctioning clients. Even though the agents of the welfare departments under study were found to ‘balance the offering of choice, the justification of limitations of choice, and the exertion of behavioural control and psychological control in different ways’ (ibid: 1712; 1715), the prevailing pattern was action in line with expectations held by their hierarchy and contained in welfare-to-work programmes more generally. Fundamental to this was careful monitoring of the clients’ conduct by psychological means, including ‘pressure in the form of e.g. threatening language’. Bergmark et al. (2017), scrutinising Swedish welfare departments involved in local active inclusion programmes, equally identified caseworkers engaging with reinforced control functions when addressing ‘clients perceived to be distant from the labour market’ (ibid: 555) – even though different organisational approaches to programme implementation coexisted within these departments. Caseworkers, unsettled by problems of providing users with gainful employment for a longer period, tended to place many of them in a ‘continued precarious labour market position’ (ibid: 10) and were willing to eject non-compliant jobseekers from the benefit system.

Concerning organisations running job promotion measures – that is, ‘welfare-to-work providers – external prescriptions of the above kind have equally been found to enforce stricter compliance within relevant settings over the last decades. In the new millennium, procurement bodies have often shown a preference for ‘private providers that offer cheap labour market services guaranteeing quick success’ (Heidenreich et al. 2014: 190) in terms of mere job placements. The bureaucratic templates mentioned above pushed caseworkers to rigorously apply administrative instructions from these bodies – whereas in previous times (up to the 1990s), they had often pursued a more lenient approach. Some non-state service providers have internalised the above rationale without further ado. Thus, Swedish social enterprises offering occupational experience to jobseekers under a public procurement scheme have been found to proactively ‘market’ their contribution to activating jobseekers according to the work-first logic (Levander 2017). In his study on job search advisors employed by private companies under the aforementioned UK ‘Work

Programme', Kaufmann (2020) looked at job integration activities in a task environment 'marked by the intensification of competitive and calculative market rationalities' and a focus on 'quick wins and easy outcomes' (ibid: 207; 210). According to his observations, instructions from outside instilled a work-first orientation into the caseworkers' self-concept – even though their mandate turned out to be diffuse, given that, at the street level, this orientation was found to sit uneasily with requirements to take the jobseekers living conditions into account. While interaction with users was 'not always predictable or calculable' (ibid: 211), there were pressures to control the users' compliance with behavioural requirements and to refer doubts to public authorities (the Department for Work and Pensions), which then were entitled to apply sanctions. Ennerberg's analysis of private operators running a job integration programme for migrants to Sweden contains similar observations. She saw caseworkers struggling with their twofold remit of resolving social issues in the life of their clients and taking action to precipitate labour market entry. Given 'focus on achieving results rather than keeping individuals in the programme' (Ennerberg 2020: 727) of the organisation with the mandate, pressures to deliver job placements were high whereas clients often wished for support related to their private life. In the study of Scholz and Ingold (2021), dealing with the experience of users advised by independent welfare-to-work service providers in England, users reported 'threats' made by advisers who were faced themselves by 'pressures to reach their targets' (ibid: 1619; 1621) emanating from labour administration bodies providing them with mandates.

Even non-state service providers pursuing more ambitious goals in terms of work (re-)integration have been found to adapt to such external pressures. As they are highly resource-dependent in their relation to public authorities and critical market players, these pressures appear to markedly influence collective agency within their confines. Sama (2017), dealing with (faith-based) non-profits offering publicly subsidised jobs to marginalised citizens in Finland and Sweden, depicts how these organisations were coping with challenges endemic to welfare programmes seeking to provide work practice, improve employability, offer vocational training and deal with poor health or social problems (drug addiction etc.). Local partnerships with procurement agencies and city councils proved to be a key lever for this. The organisations under study – otherwise operating in rehabilitation, family work and nursing home or day care services – had instigated small recycling businesses or second-hand shops. Running some commercial activities, they were also competing with private firms. Due to fixed-term subsidies granted in the context of 'project cycles' (Sama 2017: 125), disadvantaged workers were employed over short periods of time in many cases. With shrinking public subsidies and reduced sales, the organisations found themselves 'forced to trim down services' (ibid). Workforce recruitment was a further challenge. Employment offices sent candidates with reduced skills while referring less disadvantaged workers to other employers. At the same time, to win a project funded by the city council, a service provider had to employ permanent staff with therapeutic skills. More generally, it had to comply with instructions of the city council's prescriptions on what they were 'allowed to do and not to do' (ibid: 128, quotation from a manager). Similar observations are contained in the Finish study of Kostilainen and Pättiniemi (2016). Their research provides insights into the dynamics faced by non-profit organisations that employ disadvantaged persons with the aim of promoting their wider social inclusion. The study shows how such organisations, operating in a context of 'increased

commercialisation' (ibid: 320), may struggle with making a poorly qualified workforce perform in businesses such as electronic waste recycling, the production of small industrial items (in this case, wooden accessories under subcontracts with commercial companies), catering services and property management (cleaning buildings and public spaces). Obtained wage subsidies, good terms with the local employment office and a mandate for providing rehabilitative services all proved vital to the organisations under study. At the same time, market success was volatile, which induced balance sheet issues, budget cuts and redundancies that induced pressures to accept a more commercial orientation and even uncontrolled growth. Embedded in complex local employment and business eco-systems while depending on 'strong voluntarism' (ibid: 326), organisations in this field easily incur the risk of losing control over their task environment.

The same impression is conveyed by the case study of Signoretti and Sacchetti (2020), dealing with Italian social enterprises operating in similar areas. Keen to develop a human resource management strategy that empowers disadvantaged workers (e.g., via distinctive job rotation schemes or teamwork models), these organisations equally appeared to be encumbered with externally imposed 'terms of trade'. Operating 'under increasingly stronger market pressures', leaders were found struggling with members who 'have difficulties in following working pace and demands' (ibid: 548; 550). A major concern consisted of winning public sector contracts and qualifying for the special fiscal relief scheme applied to social co-operatives in Italy (this scheme applies when at least 30 per cent of the staff consists of workers with health and life-related issues, such as former prisoners, drug addicts etc.). In the course of time, however, this fiscal aid was 'no longer sufficient to defray costs', hence agents put increasing efforts in producing goods and services while devoting less time to social support activities (ibid: 554; 556). Such pressures are also portrayed by a multiple case study of Dufour et al. (2022), covering four work integration enterprises in France and Denmark. The study reveals how these organisations changed their character under the influence of funding policies that came to expect 'value for money', measured by job placements and other deliverables related to active inclusion programmes. Such expectations translated into market pressures in terms of both making collective agency more commercially minded and pushing these organisations 'to differentiate themselves from competing public offerings' (ibid: 429).

Exploring the development of welfare-to-work service providers in Germany and the UK, research by Aiken and Bode (2009) hints at the role of policy change in the sector under study. The impact of such change, arising from reforms in the late 1990s and the early 2000s, was obvious in the two countries. Following a short period during which funding authorities were supportive to a more holistic approach to work (re-)integration, procurement schemes inspired by the New Public Management (NPM)-orthodoxy began to 'dictate the flavour of the integration programme' (ibid: 219) carried out by these organisations. Public subsidies were perceived to cover an ever-smaller slice of the outlay needed to accompany disadvantaged workers. In this context, collective agency revolved around short-term 'resocialisation' measures. Activities had to be quantified and recorded, and there was pressure to place people into gainful employment rapidly and with little training – which was felt to curtail the providers' wider social mission. This chimes well with findings of Künzel (2012), depicting the situation in German cities where policies began to place an emphasis on compliance to formal guidelines, via 'a reporting system

and ... detailed instructions to ... project-executing organisations' (ibid: 12). Subject to competitive tendering, welfare-to-work providers were led to obey these guidelines and respond, here as well, to external prescriptions infused with a work-first logic. Likewise, Bennett (2017) illustrates by a case study of a non-profit welfare-to-work provider in the UK that NPM-led procurement schemes reduce the room for manoeuvre for those committed to a more comprehensive active inclusion agenda, including by massive transaction costs they impose on providers.

(B) Despite the interference of strong organisational environments, collective agency in the work (re-)integration field has been found to be imbued with (*latent idiosyncrasy*) as well. Under certain circumstances, external influences may peter out due to intra-organisational dynamics which make involved undertakings stew in their own grease. This pertains to both public administration bodies and non-state service providers. A major factor here is that organisations in this field interlace with local constituencies. Active inclusion schemes often rely on 'a decentralized, dispersed, course-based provision of service' (Haikkola 2019, for the case of Finland). The study of Scalise (2020), comparing configurations in Spain, France and Sweden, demonstrates that local authorities and their welfare departments may have a wide range of margin in the interpretation of national guidelines related to active inclusion projects, in part because the latter take shape in a multifaceted and pluralistic organisational landscape. Active inclusion programmes in Sweden are a case in point. Given a 'pronounced municipal autonomy' in shaping these programmes and an increased involvement of non-profit providers implementing them, there is 'no automatic link' between governmental instructions and service provision (Heidenreich et al. 2014: 188f). Thus, the 'relation between enabling and demanding elements' in that realm is highly contingent on local orientations, given that organisational activities are embedded in a 'very scattered system' in terms of measures, programme content and distribution of competences, which implies huge regional differences concerning the 'implementation of activation strategies' (Bergmark et al. 2017: 549–51, for the case of Sweden). Observations from Germany confirm this observation. While, during the early 2000s, the labour market administration in this country changed markedly (for instance with the instigation of 'one-stop shops' in jobcentres), the implementation of active inclusion programmes partially depends on how employment services and non-state partners collaborate at the local level (Heidenreich et al. 2014: 191). The same applies to Italy, where regional conditions play a decisive role concerning the orchestration of both income support and job promotion measures. Foundations and civic initiatives are important players in some places, even as 'a standardised gate-keeper does not exist' in this country (ibid: 192; 194). Concerning France, strong local partnerships have emerged in some territories, based on local boards involving non-profit organisations side by side with employment services. In other parts of the country, such an infrastructure is missing (Künzel 2012; Greer et al. 2019). The situation in Denmark resembles the one in France insofar as national frameworks leave 'a considerable margin for different interpretations and room for discretion', with different organisational models and a critical role left to the 'interaction between managers and the frontline professionals' (Braun and Christensen 2020: 7; 9). Inter-organisational arrangements at local level can equally be unique in many respects. In his study dealing with France and Germany in the 2000s, Künzel (2012: 4) identified various patterns existing within one and the same jurisdictions. One line

of approach stuck to national guidelines in terms of accountability rules and reporting standards in the collaboration between administrative bodies and welfare-to-work service providers. Elsewhere, local policies introduced ‘greater flexibility and discretion into welfare provision’, along with ‘trust-based control’ (ibid: 6; 7) towards these providers, which were also invited to action planning and programme development.

More generally, the very organisations involved in active inclusion programmes seem to live their ‘own life’ in many instances. This, first all, applies to public employment service agencies which have long been accused of cultivating a bureaucratic spirit amenable to inertia and a lack of responsiveness (see Froy et al. 2011 or Weishaupt 2013). A typical example is Italy where these agencies were often characterised as being ‘state-centric, hierarchically organised and judged as fragmented and inefficient’ (Heidenreich et al. 2014: 192). Internationally, a typical charge levelled against such bureaucracies consisted of their (alleged) propensity to be phlegmatic and to insist on clearly demarcated (special) responsibilities instead of taking a proactive stance. While this may not be the whole story about employment services in the past, such verdicts indicate that self-reference may be highly relevant to organisations from the field of labour administration. At the same time, as Clouet et al. (2022) demonstrate in their study on ‘bureaucratic encounters’ in French and German employment service agencies, actions within these organisations tend to rely on negotiated relationships in which case managers, while following formalised procedures, arbitrarily deal with the (alleged) social and cultural capital of jobseekers when proposing job search activities or training opportunities. In the above study, the outcome of the encounter often depended ‘on a caseworker’s discretionary decision’, hence case managers acted as capricious “gatekeepers” for investments in capital accumulation’ (ibid: 705; 710). Brandt et al. (2021) echo this finding in a study that reveals a huge variety of professional orientations within welfare departments dealing with (unemployed) benefit claimants in Flanders (Belgium) – as does further research from the same region which displays various interaction styles of caseworkers at the street level (van Parys and Struyven 2018: 1705–709). The survey undertaken for this research identified a myriad of behavioural patterns, concerning for instance the degree of formalism or the propensity towards coercion, in a context in which agents were expected to balance ‘activation and protection; unemployed people’s preferences and labour market needs; and quick and sustainable job placement’ (ibid: 1712).

Importantly, changes to the mandate of all these organisations – most notably, the proliferation of the ‘work-first’ rationale – have been found to entail new forms of idiosyncratic practice, including when it comes to the management of active inclusion schemes. Thus, Haikkola (2019: 334), dealing with Finland, describes a ‘messy’ arrangement of street-level practice in the context of a managerial governance structure pushing caseworkers to ‘exerting control over the young client’s plans, use of time, and actions’. A study conducted in Austria found similar dynamics when exploring the practice of employment service agents (Nothdurft 2016). It was observed that, torn between output-driven activation policies and the vicissitudes inherent in the personal interaction with benefit claimants, these agents were teasing out ‘a personally acceptable way to get along in this job’ (ibid: 431) while struggling with the development of a consistent work style in tune with the official mandate. Seeking empathetic responses to a user’s needs remained a ‘personal concern of the single practitioner’, and many agents felt thrown back on ‘individualistic

self-reliance in coping with the impositions and difficulties of their job' (ibid: 432). Penz et al. (2017) add to this by highlighting ramifications of (futile) efforts to activate 'uncooperative' users in this work context, including 'by threats to impose sanctions'. Investigating the cases of Austria, Germany and Switzerland, they observed such efforts being imbued with 'frustration and anger on the part of employment agents' (ibid: 555), feeding into feelings of resignation and disaffection. Khoronzhevych and Fadyl (2022: 583), dealing with active inclusion schemes for immigrant jobseekers in Norway, concur with this view. According to their investigation, agents often felt unable to assist jobseekers in more comprehensive ways, 'due to pressure to find a work placement' short-term. Likewise, the study of Paulsen (2018: 379) brings to the fore that agents under such pressure, confronted with moral dilemmas such as urging jobseekers to accept meaningless work promotion activities, may show signs of disengagement when developing 'strategies for avoiding the worst parts of their job' (Paulsen 2018: 379).

Similar dynamics have been observed for external service providers in the work (re-) integration field. Findings by Kleppe and Støren-Váczy (2019), exploring temporary employment agencies' role in programmes to improve work inclusion of immigrants and refugees in Norway, suggest that agents (have to) embark on a somehow arbitrary screening of their clientele's employability, with uncertain prospects to 'sell' them to employers. Relatedly, Considine et al. (2018; 2020), dealing with UK for-profit umbrellas controlling large swathes of welfare-to-work services during the 2010s, show that employed agents were expected to maintain frontline discretion while simultaneously operating under a tough performance regime. In this context, idiosyncratic decisions were likely to occur. As Kaufman sets out in his ethnographic (case) study, advisors employed by these umbrellas or by their subcontractors appeared 'differently disposed to the coercive and punitive possibilities of their position' (Kaufman 2020: 212). Some were prioritising the perceived needs or wishes of users, rather than the attainment of job outcome targets; others, aware of the propensity of public employment services to cut benefits when informed about a user's non-compliance, understood 'decisions to "park" clients' as a 'way of protecting them from unwanted and unhelpful interference' (ibid: 214). Categorisation seemed a matter of judgement and subject to personal impressions, even as agents struggled with intuiting job-readiness, given the veil of ignorance around the process of 'activation' in the life of a given user.

The admission of for-profit providers to active inclusion programmes in various countries can be viewed as having generated a further potential for idiosyncratic collective agency because employees of such providers are often forced to consider input-output ratios very carefully, especially when private operators are keen to make profits (Greer et al. 2018a). International evidence suggests that related organisational behaviour, encapsulated in the notions of creaming and parking, has occurred in many places (see Chapter 8). As for non-commercial service providers, the quasi-market governance of active inclusion schemes developed in several parts of Western Europe has been found to have implications akin to those experienced in 'managerialised' employment services. As a case study conducted in Germany indicates, the workforce of providers exposed to a public tender regime can experience considerable emotional stress, which may induce erratic behaviour and equally become a source of 'organised' idiosyncrasy in the area under scrutiny (see Betzelt and Bode 2022). The same holds for organisations running job



promotion measures while pursuing a value-driven organisational ‘mission’ – for instance under the roof of faith-based associations (see e.g., Sama 2017). Such organisations have at times been found to carry a strong ideational imprint of small activist groups or even a single person. Thus, Pfeilstetter (2020), studying a small firm employing marginalised citizens (e.g., former drug addicts) in Austria, illustrates the special approach of its founder (and manager) who defined her organisation as an ordinary (‘petty capitalist’) business ‘paying “normal wages”’ (ibid: 516–17) to its (temporary) employees, despite receiving huge amounts of public funding. The enterprise, selling expensive, recycled fashionable hand-bags modelled on a well-known commercial product, was competing with both private firms and other charitable projects. There was idiosyncrasy insofar as the organisation was geared towards cultivating the above ‘corporate image’, notwithstanding its work integration role. In doing so, it incurred the risk of downplaying its social mission which, however, was needed as a ‘selling point’, given that local competitors flagged this role more proactively (the study mentions a faith-based organisation operating in the same area). Furthermore, work integration social enterprises have often been found to be self-absorbed with their business plans and market strategy issues. In a study retracing the development of a social cooperative in Catalonia (Spain), Arenas et al. (2021) illustrate how this may be conducive to yet another variety of idiosyncratic behaviour. Competing with peer organisations, a major concern of the cooperative was to spearhead innovative business ideas with ambitions to make the organisation grow. Looking for economies of scale and options to merge with other companies under a business-like banner, it developed a more hierarchical internal (governance) structure (ibid: 15). While this was not necessarily detrimental to its economic results, collective agency deployed in this process did produce tensions at different levels, in part because the aforementioned strategy was susceptible to what the wider scholarship on non-profit organisations refers to as mission drift (for a related discussion, see Kostilainen and Pättiniemi 2016). Indeed, many ‘makers’ of welfare in the realm under study here pursue a ‘hybrid’ mission, with the ambition to become an economically independent market player over time, despite a workforce that is less productive than its critical competitors. As the cultivation of this self-image may divert a welfare organisation from its social purpose, collective agency driven by the idea of becoming a ‘business like others’ points to idiosyncrasy as a latent momentum of organisational change in the above realm.

(C) Some strands of research on collective agency related to active inclusion schemes suggest that welfare organisations in this area produce (some of the) expected outcomes precisely because they operate in a semi-independent manner. This indicates *conservative praxis* in the sense that the ‘makers’ of welfare accommodate prescriptions contained in their mandate to the empirical reality they are faced with. This may be indispensable because active inclusion schemes and related policy frameworks have been found to be fraught with considerable ambiguity – for instance the idea of empowering people by enforcing assistance or training arrangements (see Baker Collins 2016). Furthermore, caseworkers in this field may feel a need to suitably adapt these highly formalised schemes and frameworks to the volatile life situation of users, given the frequent mismatch between extant capabilities and what is written in the rules.

This configuration has, first of all, been discussed with respect to organisations responsible for job placements and job search assistance. The above-cited study of Clouet et al.

(2022), exploring negotiated relationships and bureaucratic decision-making in French and German jobcentres, bears witness to the fact that agents in these organisations cannot but carve out their own ways of dealing with the diverse characteristics and ambitions of users. Agents must establish rapport with the latter and respond to the dilemma that extant regulatory frameworks want benefit claimants to take action while adequate job opportunities, as well as training programmes, may be rare – which entails a propensity to make jobseekers ‘invest in social capital’ (ibid: 707) with uncertain outcomes. Braun and Christensen (2020), referring to change in the remit of Danish jobcentres, elucidate organisational behaviour at the frontline in a similar context, with caseworkers being exposed to both a work-first rationale and higher conditionality of social assistance benefits. Comparing two organisations, their study shows how the involved actors took different routes to respond to this pressure, with each jobcentre carving out its own path towards categorising its clientele (beneficiaries pursuing education, jobseekers sent to companies for training or mentoring) and to make related decisions (for instance, granting an education benefit, or declaring a claimant employment-ready). They found different configurations: in one setting that went through ‘total reorganisation’ (including a merger of the job placement department with a youth education counselling unit), caseworkers were observed to concentrate their coaching on ‘opportunities available to people to participate in the education system’, defending an approach that ‘focuses more on possibilities and less on barriers and poverty’ (ibid: 11; 15). Elsewhere, there was no change in the organisational model, with the jobcentres trusting in their caseworkers’ general expertise. Decisions were ‘seen as a professional judgement which did not involve economic considerations’ and geared towards a ‘realistic understanding of difficulties’ of clients (ibid: 15; 17). In both configurations, collective agency appeared self-reliant in the sense of implementing an overarching institutional agenda (‘work first’-oriented active inclusion) in ways viewed to be functional in the local context.

This chimes well with findings of Jacobsson et al. (2020) who explored the ‘agency culture’ of a public employment service unit in Sweden. Their study looked at how the unit mediated responses to ‘managerialist’ instructions from the top hierarchy and adjacent public authorities. Concerning the affected staff, a ‘management-by-objective’ scheme and performance audits raised scepticism and resistance towards official directives among the staff. Agents, while expressing strong personal involvement, continued to build ‘their work on personal knowledge and experience developed in close contact with external actors’, with the ‘rationality of their work’ being defined as ‘complex craftsmanship’ (ibid: 325). Many caseworkers felt able to deal with their clientele according to their own (holistic) role concept, notwithstanding a perceived mismatch between the accustomed identity and instructions from above. Similarly, Ennerberg (2020), dealing with employment services and out-contracted job search assistance projects for migrants in the same country, found agents to advocate a flexible application of active inclusion policy frameworks. Among the interviewees, the ‘weight put on individualised measures was often magnified due to social problems that lay outside the scope of unemployment measures (ibid: 725). Consequently, when devolving tasks on non-state operators, collective agency revolved round a tailored mix of coaching talks, ‘life-first’ support and assessments of the jobseekers’ capacities (in terms of training and work experience). The crucial role of such pragmatism was confirmed by research conducted on the same group of users in Norway (Khoronzhevych and

Fadyl 2022). The respective investigation, centring on action taken within local welfare departments, illuminates how caseworkers may be driven to develop flexible strategies to fulfil their official mandate. While, in this context, activities were geared towards job placements in the first instance, they were carefully devised to accommodate encountered life circumstances. Thus, agents encouraged jobseekers to express their career choices although they were keen to guide them ‘towards ‘realistic’ job opportunities’, with priority given to ‘those who would most benefit’ from the counselling work (ibid: 585). Similarly, findings by Bakkeli (2022) illustrate how caseworkers in Norwegian employment services developed flexible routines even in a regulatory context shaped by highly standardised procedures (evidence-based templates), notably by building individualised relationships with clients which at times involved the adoption of an advocacy role (ibid: 9).

To an extent, conservative praxis striking a balance between what (ambiguous) regulatory frameworks command and what situational conditions require also matters when caseworkers interact with users. In their investigation on German jobcentres, Gottwald and Sowa (2021) observed that case managers were using communication strategies informed by social work technologies, including efforts to build trust-based relationships. Penz et al. (2017: 552) – dealing with jobcentre agents in Austria, Germany and Switzerland – echo this impression by depicting the agents’ use of affective (soft) skills with the aim of developing ‘a fair and partner-like dialogue to boost their confidence and self-efficacy’. A similar configuration is portrayed by Senghaas et al. (2019), drawing on research conducted in three German employment offices. Caseworkers filing individualised agreements with claimants were observed to use their leeway in the case management process, at least for part of their clientele. When interacting with users, they resorted to persuasion work and tried to establish mutual confidence, referring to ‘themselves as trust-takers and to clients as trust-givers’ (ibid: 615). Hence caseworkers seemed to ‘create their own balance between the supporting and regulating elements of social policy’ (ibid: 619) – with intentions to make jobseekers adapt to ‘the rules’ more willingly while paying specific attention to their subjective conditions. Observations from Scholz and Ingold (2021), analysing the experience of jobseekers with mental health conditions in the context of the UK ‘Work Programme’, resonate with this analysis. The two authors describe how employment advisers mandated by this programme were sensed to have had a ‘stabilising effect’ on users through paying attention to their subjective conditions (ibid: 1619) and personal efforts to provide users with regular routine, appropriate contacts and some autonomy over their job search. These efforts bear witness to the ‘conservative’ character of street level praxis in the sense that the processing of cases sometimes presupposes action beyond the rules even when the focus lies on fulfilling an official role within a given institutional context.

The traits of modern professionalism (as discussed earlier in this book) may matter greatly in this context, as comes to the fore in research of Dall (2020) when portraying the teamwork of specialists that Danish employment services entrust with ‘holistic assessments and recommendations’ when addressing unemployed citizens with impairments. The multi-agency teams this author shadowed had a remit to make recommendations on complex cases, with possible decisions being the assignment of a pension or allowance, flexible employment, the entry into a job promotion programme or the return to ordinary interventions of the employment service. Basically, these decisions had to be in line with

‘local conditions of available programmes and interventions’ (ibid: 81). The teams used to assign the final responsibility to employment service staff but tried hard to bring in their own expertise. Representatives of employment services, feeling pressurised by their ‘organisation not to facilitate an increased demand for services’ (ibid: 87; 89), felt troubled by the difficult communication with clients, depicted as involving ‘emotionally taxing personal issues’. Other members were concerned with final decisions not doing justice to the personal situation of benefit claimants. Hence collective agency in this setting was constantly juggling different rationales before eventually striking a balance. Similarly, Brandt et al. (2021), drawing on interviews and participant observation in Belgian social welfare departments doing casework with long-term jobseekers, found many agents empathetic with personal life conditions of the latter – which, according to the authors, influenced the decision-making process (infused by what they label a ‘benefits perspective’). While believing in their organisation’s mission to carry out procedures in line with legal norms, (part of the) workforce felt committed to investigating ‘terms of eligibility in order to distribute sufficiently welfare provisions’ (ibid: 71), thereby implementing these frameworks in rather generous ways. Arguably, such orientations may contribute to labour market policies being sensitive to what makes relevant target groups progress in terms of social inclusion.

Similar dynamics occur when it comes to welfare-to-work services. Recent research on the implementation of such services suggests that many providers use leeway in running measures mandated and overseen by (quasi-)statutory bodies (jobcentres, social welfare departments). Here as well, collective agency adapts institutional prescriptions to extant conditions. The case study of Betzelt and Bode (2022), presenting (among other things) evidence on a municipal training centre for disadvantaged young people in Germany, points to ‘structural dilemmas between bureaucratic prescriptions and modes of social intervention aimed at responding to rapidly changing and instable social needs’ (ibid: 11). In essence, their analysis elucidates the role of organisational agents in mediating processual challenges posed by both a ‘troubled’ clientele and pressures generated by a highly formalised public tender scheme. Notwithstanding considerable emotional strain put on the organisation under study, it worked hard to develop and deliver training programmes in line with both user needs and agreed deliverables. As essential social tasks were not formally spelled out in the organisation’s formal mandate, agents felt urged to seek provisional solutions when implementing training programmes or engaging with their clientele’s personal problems. The case study demonstrates how ‘institutional norms and organisational practices combine with emotional experience at the street level to shape the functioning of human services provision’, with collective agency driven by the ambition of ‘meeting organisational goals against all odds’ (ibid: 22–3).

Further studies have come up with similar observations (Aiken and Bode 2009; Jones 2019). Among other things, they suggest that non-profit organisations in the field under study often serve as a proactive transmission belt of ill-defined public programmes. Blonk et al. (2020), who engage with the inner life of a Dutch work integration social enterprise employing citizens with mild intellectual disabilities, shed light on the intricacies related to this role. This enterprise sought to acquaint its (handicapped) workforce with the free market for products and services (in a wood shop fabricating labour intensive design products). The public programme providing support to this endeavour was aimed at creating

“adjusted” regular jobs’ (ibid: 976) for the above clientele as quickly as possible, yet caseworkers felt urged to account for the ‘lack of perspective in low paid jobs at the bottom of the labour market’ (ibid: 973). They adapted the official mandate inherent in a public programme to the latter’s particular clientele by combining a logic of care (meaning social support in various respects) with a logic of work, seeking to make clients proceed at their own level and pace, in contrast ‘with former work experiences and ... expectations about work in a regular company’ (ibid: 982). At the same time, product orders were sensed to be imperative, hence the work logic had to be ‘actively created by the employers’ (ibid: 981). Under these circumstances, the logic of care came ‘forward in an implicit manner’, mainly through the social recognition employees inferred from their activity – although this recognition was fragile as workers made ‘painful comparisons’ (ibid: 987) with colleagues and citizens outside the organisation. While ‘the structural conditions of the labour market constantly threaten[ed] to undermine the recognition derived from successful balancing acts’ (ibid: 987), the organisation was found to contribute to preserving a minimum of ‘normality’ in the lives of their clientele, albeit without being able to challenge these conditions more substantially.

Likewise, Arenas et al. (2021), analysing the development of work integration social enterprises in Catalonia (Spain), picture efforts to balance ‘commercial and social goals’ for the sake of ‘helping socially excluded individuals transition into the labour market’ (ibid: 2; 5). This was paralleled by ambitions to serve the needs of the wider local community (e.g., by selling goods for affordable prices and decreasing textile waste). The authors delineate a process of permanent adaptation, including the quest for subsidies from foundations and municipalities, responses to shifts in the latter’s funding priorities and efforts to scale up activities to become economically sustainable and survive the competition with peer organisations. While espousing the objective of active inclusion in one way or another, collective agency in this setting revolved around matching the respective remit with actual opportunities (concerning the type of work ‘on offer’), the time available for individualised support and extant market constraints. In the cases under study, this challenge entailed tensions at different levels, even though it did not jeopardise the undertaking as such.

Bandini et al. (2021) drew a similar picture when analysing ‘social co-operatives’ in Italy. Receiving public support (fiscal relief, public sector contracts) and working in ‘close collaboration with local social services and mental health centres’, these organisations run businesses with the declared intention to create ‘public value’ (ibid: 63; 68), notably by providing work to disadvantaged citizens (drug addicts, former prison inmates, mentally disabled people, immigrants, etc.) in areas such as cleaning and reception services, waste disposal or the production of handcrafted products. The study illustrates how these organisations sought to help their clientele acquire ‘greater autonomy’, conceiving of themselves as a ‘promoter of social inclusion’ (ibid: 69; 73). When doing so, they felt ‘strongly urged’ by the market and under constant pressure to ‘increase ... social reputation’ (ibid: 82). Again, this implies both living with constraints (concerning the reintegration of marginalised people into socially cohesive lives) and grasping opportunities for adapting the (work-first) logic of these programmes to the life circumstances of target groups. Case studies conducted by Baraibar-Diez et al. (2019) in Spain convey the same impression. The authors found work-integration social enterprises to be committed to organising an

'itinerary of social and labour insertion' for disadvantaged citizens, mainly by orientation actions, mentoring and efforts to solve personal problems (ibid: 315). Activities were based on fixed-term work contracts in areas such as second-hand trade, recycling work and simple cleaning services. This endeavour was backed by a national act providing tax exemptions to such organisations as well as income subsidies to citizens employed by them. Enterprises drawing on this act underwent public scrutiny, as they had to register and participate at annual audits. Here as well, collective agency contributed to implementing active inclusion schemes by trying to accommodate the latter into what was feasible within the 'mixed' market environment the organisations were exposed to. The organisations adopted a conservative role in that they made these schemes and their built-in ambiguity work – without necessarily improving the living conditions of their clientele more substantially and in the long term.

(D) Some studies dealing with the active inclusion field suggest scope for *transformative agency* in relevant organisational settings. As for employment services, such agency may counteract imposed agendas or adjust the rationale of a dominant policy approach. Paulsen (2018), in his research on dynamics in a Swedish jobcentre, shows how agents lamented reforms imposed under NPM and 'openly shared which actions they would have preferred over the ones the organisational power structures required of them' (ibid: 368). His study sheds light on attempts to walk this talk, for instance in cases where agents passed over certain administrative requirements. Overall, he found that these and other 'acts of transgression' (e.g., slacking or sabotaging) served as a mental safety net in the first instance, 'hindering the employees from more radical resistance' (ibid: 370). While, in this context, transformative agency remained embryonic after all, 'makers' of welfare did cultivate orientations that differed from prescriptions inherent to regulatory frameworks – which is a precondition for welfare organisations challenging extant regulatory frameworks more overtly.

These observations tally with findings of Ybema and Horvers (2017) in their research about a major reshuffle of the Department of Work and Income in a Dutch municipality. The intention behind this policy was to reduce the number of residents on welfare benefits and to decrease expenditure by applying lean management methods. Middle managers and employees were found to engage in oppositional discourse and subversive activities, albeit by mingling their resistance with tactical acts of compliance. To the staff, this resistance appeared as a 'reasonable response to unreasonable change initiatives' (ibid: 1242). Although the personnel remained careful and continued performing official tasks, their operations exhibited a 'subversive potential' residing in 'secret workings behind apparent consent' (ibid: 1248). Agents were signalling discontent and unrest, or embarking on secret offstage opposition. Change efforts were smothered with reluctance, ridicule, indifference and inaction. This seemed to nurture a sense of autonomy, which released agents from engagement in programmatic change imposed from the outside. Implications of the latter were only partially circumvented in the process of implementation – yet, at least, the employees' behaviour induced frustration on the side of those top managers which had promoted the above reshuffle.

Similar dynamics emerged in Dall's (2020) study on case management teams in the Danish labour administration. Team members involved in needs assessments expressed discomfort with clients not receiving 'the help they need due to organisational resources'

as well as with ‘contradictions between the client’s wishes and abilities and the policy demand of labour-market participation’ (ibid: 86). Feeling pressurised ‘not to facilitate an increased demand for services’ (meaning: to avoid too generous entitlements to job promotion and training schemes), some members distanced themselves from the imposed agenda, by stressing their professional ethics and moral responsibilities, ‘expressed in opposition to institutional responsibilities of enacting legislation’ (ibid: 89–90). Likewise, Ennerberg (2020: 725), dealing with job promotion programmes for immigrants and their orchestration by Swedish employment services, identified caseworkers who stressed social goals and opposed ‘efforts to achieve a stronger workfare perspective’. A similar observation is contained in Nothdurfter’s study dealing with a special active inclusion unit in Milan (Italy). Under the influence of NPM-driven policies, the professionals in this unit maintained a social service and counselling approach typical of welfare professionalism instead of the work-first mantra (Nothdurfter 2016: 634). While they were exempted from taking decisions on benefits (which no doubt facilitated this commitment), collective agency in the respective organisational setting revealed a potential for welfare organisations to deviate from an imposed regulatory framework.

Related ‘professional perspectives for practice’ (Brandt et al. 2021: 75) may have a bearing in many other places as well. In a study on agents employed by public welfare centres in Flanders (see above), Brandt et al. identified case managers who confessed to adhering to unconditional social rights or who even displayed a ‘renewed militancy’, materialising in the ‘use of discretion to resist a controlling workfare logic’ (ibid: 76). More generally, the study found ‘no indications that social workers are shifting *en masse* toward workfare’. Drawing on their entrenched professional ethos, many agents seemed to disapprove of the logic of compulsion pervading the prevailing active inclusion agenda while advocating for rights to unrestricted social support. Some respondents expressed a strong belief in the unconditionality of human rights as well as reluctance to ‘judge the situation in which the client lives’ – which the authors deem indicative of a ‘critical-emancipatory ontology’ shaping professional perspectives in the setting under study (ibid: 75–8).

While within welfare bureaucracy work contexts, attempts to ‘make a difference’ often remain informal, subtle or at least incremental, a more straightforward potential for transformative collective agency may emerge when active inclusion programmes depend on inter-organisational collaboration and the related collaborative endeavour. Describing characteristics of an urban regeneration project in France, Schulte et al. (2018) provide an example of transformative dynamics shaping the interplay between actors from different welfare organisations. A broad coalition, composed of representatives from both municipal public agencies and service providers for this project, was found to impact upon the approach of employment services at local level. The result was a soft activation approach, featuring comprehensive needs assessments (paying credit to social factors such as racial discrimination or childcare obligations) and high labour process autonomy in case management processes. The active inclusion units were observed to run ‘meetings of open-ended length with users’ and to be ‘deeply embedded in local social service networks’ (ibid: 335; 333). On the side of frontline caseworkers, the idea of compulsion often met with reluc-

tance, but there was a strong commitment to social work and educational support, along with intentions ‘to give individuals free choice’ (ibid: 336) in rebuilding their work career.

This pattern of collective agency was apparently facilitated by public policies exhibiting a more moderate work-first orientation (Scalise 2020: 114–20), with case management processes being ‘insulated from the logic of targetisation’ (ibid: 335). The above observations nonetheless hint at a potential for transformative agency instilled in organisational settings dealing with active inclusion programmes. The latter often require local level networking (Heidenreich et al. 2014; Haikkola 2019: 336; Lindsay et al. 2019), which opens spaces for arrangements that differ from what is contained in regulatory frameworks. Once there are strong local actors able and willing to convince adjacent stakeholders, active inclusion schemes can adopt a special flavour and enable involved welfare organisations to ‘shape the larger rules of the field’ (Arenas et al. 2021: 179). In this context, transformative agency may also take effect with efforts to establish geographical boundaries for protected economic activities of social enterprises (e.g., for the second-hand clothing sector), based on compacts between welfare-to-work providers and local authorities (enforcing, for example, long-term contracts for street collection containers).

Such dynamics may also occur within organisations commissioned to provide welfare-to-work services, particularly those that concentrate on social support and job search assistance. Examples from Britain – a country exhibiting a tough work-first regime – are telling. Jones (2019), presenting findings about a local association delivering services for a so-called ‘Work Club Programme’ (which was designed to support job search activities of unemployed residents) portrays energetic efforts to defend the rights of benefit claimants. Under this programme, non-profits became funded to offer marginalised citizens (in Jones’ research: homeless people) a range of employment support services, including vocational training and arrangements providing work experience or paid employment opportunities. The organisation under study, benefitting from a national fund and local grants, did not only ensure practical support for its users but engaged in ‘crisis work’, meaning action in favour of beneficiaries sanctioned by jobcentre agents – with the aim of mitigating ‘the impacts of the highly conditional statutory social security system’ (ibid: 106; 111–12). Lindsay et al. (2019), analysing the implementation of a Scottish programme targeting lone parents in five local government areas, come up with similar observations. Their study captures the approach of non-profit organisations working with local government and other partners to implement the programme. The organisations’ mandate consisted of creating ‘opportunities for users to exercise agency or shape the content of services’ (ibid: 650) via various supportive activities (employability or skills training, personal development, mental health and wellbeing, money advice and debt management, childcare provision). Concerning the actual implementation, these users were invited ‘to make choices, in terms of how and how much they engaged with a range of services, and the kind of employment or other outcomes that they targeted’ – with one intention being to protect them ‘from Jobcentre Plus’s conditionality regime’ (ibid: 653). While this was facilitated by a ‘lack of dirigiste top-down control and ... performance management’ in the public authority supporting the project (ibid: 655), the caseworkers’ investment bears witness to a potentially transformative role of collective agency in the active inclusion area. The same conclusion can be drawn from findings by Tracey and Philipps (2016) who retrace how an English social enterprise with a small branch providing advice and training



courses to marginalised jobseekers (migrants) became a promotor of humanistic values both locally and transregionally. Being challenged by xenophobic tendencies around and within the organisation, the latter embarked on a process of introspection and identity work, feeding into a voluntaristic strategy of advancing the life of local immigrants. This was achieved by embarking on the aforementioned Work Club Programme and attracting local government contracts through which the association was enabled to deliver community projects and services.

There is further evidence that non-profits involved in active inclusion programmes make their local environment sensitive to opportunities for innovation. In the history of the active inclusion field, one of these opportunities consisted of interconnecting the furtherance of a local community's welfare and the (re-)integration of jobseekers into the labour market. Reaching out to other actors in the community (educational institutions, social services, sports clubs and local culture), initiatives pursuing this approach sought to engage with 'the sustenance and co-shaping of an "integration milieu" of networks surrounding the(ir) organisation' (Aiken and Bode 2009: 221, presenting evidence from England and Germany). According to the aforementioned study of Schulte et al. (2018), staff working for French non-profit organisations pursuing similar ambitions took action to avoid 'the encroachment of workfare principles' (ibid: 338) in the related policy field. Moreover, collective agency in this context was found to buck a trend towards involving for-profit providers into these schemes, by treating commercial startups, deemed to spread workfarist ideas further, as network outsiders.

In a further article dealing with the same setting, Greer et al. (2019: 1889) point to the 'high level of provider input' when designing active inclusion schemes in encounters between funders and providers, with this being based on close-knit teams geared towards common problem-solving (ibid: 1890). This concurs with observations of Dufour et al (2022: 430) according to which work social enterprises in France seek to 'educate' public stakeholders when it comes to defining the criteria underlying performance assessments in this sector. More generally, non-profit (third sector) organisations have often been found to play 'crucial roles as "lobbyists"' (Künzel 2012: 13) within political arenas relevant to the design of active inclusion schemes. Knuth (2020) lists related activities of umbrella organisations residing in the German non-profit sector. This also reveals the role of collective agency when it comes to developing and propagating concepts for making the active inclusion endeavour more sustainable and emancipatory.

## 14. Offering independence to dependent people? The provision of personal care in later life

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Regarding the prospects of a safe old age in the twenty-first century, the ‘organisational factor’ deserves special attention as well, and this is certainly so when it comes to the orchestration and provision of human services in what usually is referred to as long-term care (LTC) systems. As discussed in Subchapter 9.3, personal care in the homes of frail citizens has evolved into a relevant component of these systems, notwithstanding huge international differences concerning the institutionalisation and magnitude of this (sub)field of organised welfare provision. Most European LTC systems have seen developments ‘conducive to person-centred care’ (Abrams et al. 2019: 1985), with services provided according to subjective needs (Hughes and Burch 2020) and with the goal of making individual users maintain or regain capacities to live independently (Rostgaard and Graff 2023). Hence domiciliary care organisations can be assumed to be vibrant places for contemporary ‘makers’ of welfare. In most European countries, providers in this field operate side by side with informal helpers who belong to the care recipients’ family or are employed by their household on an individual basis. Traditional arrangements had been anchored in a gender regime, which assigned care work to women and were sustained by segregated employment patterns. Recent public policies have encouraged care recipients and their families use available professional support or to recruit home help services on a buoyant (grey or publicly subsidised) labour market. In this overall context, domiciliary care organisations are entangled in a complex web of responsibilities and social relationships, which entails considerable heterogeneity concerning the ‘processing’ of social intervention. Similar to what has been accomplished above for the areas of child protection and active inclusion work, the analysis will first illuminate the nature of personal home care as portrayed in the wider literature, before embarking on a condensed scoping review of recent case study research that provides insights into current varieties of collective agency throughout this particular area of organised welfare provision.

As noted earlier in this book, (organised) personal home care is a versatile concept embracing various acts of individual support for frail people. What is included in its remit depends on the architecture of national LTC systems and differs according to expressed, or assessed, individual needs. Against the background of blurred boundaries between different activities (Hellgren and Hobson 2021; Meuret-Campfort 2021), personal care often overlaps with the practice of nursing (that is, activities such as giving injections, checking blood sugar, catheterisations, wound care, etc.). This is quite common internationally, although such support is often provided by occupations with other (or no) qualifications. The core nature of personal care resides in non-paramedical services concerned with the ‘activities of daily living’ around the clock. Fine (2020: 169) refers to these services as ‘personal assistance provided with the intention of enabling, supporting and enhancing life’. Such assistance may embrace repetitive and routine acts of self-care (hygiene, eating, dressing, moving, going to the toilet, taking

medication), housekeeping (practical chores such as cleaning, laundry, shopping), administrative tasks (record keeping in logbooks, the management of money, the involvement of trustees, etc.) and an unspecified set of social activities (e.g., escorting users to appointments or entertainment events), often referred to as companionship. Importantly, such personal care work implies moving around between several domestic configurations, each presenting its own challenges including in terms of ‘access to the older person’s environment’ (McDonald et al. 2019: 502). Moreover, the ‘peripatetic nature of care-at-home work’ (Cunningham et al. 2021: 199) involves various imponderables. In many respects, the accomplished work relies on co-production, as users participate in the practical realisation of human service processes (Hasenfeld 2010). In domiciliary contexts, such co-production may also involve further parties such as staff working for healthcare agencies or social welfare departments, as well as relatives who often sustain a good deal of hands-on support while leaving other (more sophisticated) acts of care to salaried staff. Frequently, informal caregivers including relatives monitor domiciliary support arrangements which may imply ‘ambiguity about who’ is the user or client. Such arrangements point to a ‘triadic relational nature of care’ involving ‘family carers as well as clients and care workers or health and social care professionals within care-giving networks’ (Pollock et al. 2021: 2063; 2071).

At face value, personal care services in Europe are based on pre-defined mandates comprising certain acts of bodily care or domestic help. However, these services rely on dynamic processes of personal interaction. Habitually, they come with an ‘appropriation of private spaces’ (Pollock et al. 2021: 2061) and are expected to help users ‘with the most intimate and personal aspects of living’ which involves ‘maintaining discreet routines and promoting personal dignity’ (Hayes 2017: 2). Concomitantly, home care is ‘an embodied practice that requires mental and physical patience’, with workers being requested to ‘exhibit an interactive capacity to wait for direction or response’ from care recipients or relatives (Hayes and Moore 2017: 333–4). Sought-for is ‘considerable empathy and ingenuity to meet the ... needs of service users in challenging situations’ (Turner et al. 2020: 2225). This requires ‘creative solutions’ including attempts to influence the mood of users, as well as being ‘available, flexible and adaptable’ (Abrams et al. 2019: 1983; 1985). In addition, both care recipients and their households are ‘moving targets’. Tasks are ‘mostly incident- and relations-driven’, hence the situatedness of care work (Kemper-Koebrugge et al. 2019: 979). Since frailty implies ‘a loss of functional abilities and control over one’s life’ (Hoedemakers et al. 2019: 3), personal care is often faced with evolving and unpredictable states of health (for instance eye disease, impaired hearing, diabetes or physical restrictions). Ageing frequently implies a decline in communication skills and behavioural problems, which is epitomised by people with dementia (Sutcliffe et al. 2021), affected by increasing forgetfulness and self-neglect. Given the variable nature of the condition, dementia care comes with special risks, for instance when such people are cooking, managing money, walking outside the home or managing their medication (Sandberg et al. 2021: 1701). In this context in particular, personal care can be equated with risk management (avoiding malnutrition, making a house safe, observing changing states of health, etc.).

More generally, care work has often been understood as a ‘labour of love’ (Graham 1983), most prominently in the theory of nursing. Caregiving, it is argued, involves building and maintaining social ties that ensure empathetic attention, dialogue and capacity to socialise with others (Jonsdottir et al. 2004). With this mission, professional home care is genuinely personal in that it is performed within a secluded private life-world. The recurrent face-to-face

encounter between home care workers and users, involving a small number of persons in most cases, may create appreciative bonds, sometimes even in quasi-kinship terms (Pollock et al. 2021). These bonds may be formed even with very basic activities, such as providing meals, given that personal relations ‘are built through the process of engagement that develops and deepens over time’ (McDonald et al. 2019: 509). That said, the fact that services are provided ‘behind closed doors’ by ‘lone workers’ (Abrams et al. 2019: 1978; 1990) makes them susceptible to inducing tensions. Care workers may become ‘exposed to challenging or distressing behaviours, such as kicking, biting or verbal aggression’ (by people with dementia, Abrams et al. 2019: 1985) or experience ‘rude and disrespectful behaviour from service users’ or their relatives (Ravalier et al. 2019: 352). In addition, care work relationships may be fraught with ‘anxiety accruing to moments and forms of reliance believed to impede individuals’ abilities to make decisions without being influenced by others’ (Buch 2018: 19). Once interventions interfere with a user’s life-world, they tend to reveal a person’s ‘diminishing ability to meet the demands of liberal personhood’. Hence carers may see a need to downplay the state of care-dependence in the encounter with users – which Buch (ibid: 20) considers one of the ‘most complex and nuanced aspects of care workers’ jobs’. At least, home care settings exhibit a ‘complicated relationship between (inter)dependency, participatory parity and capabilities’ (Knijn and Hiah 2020: 160). In this vein, home care work has frequently been found to be imbued with deep emotions (see d’Astous et al. 2019; Albert et al. 2022). On many occasions (for instance, in end-of life care settings), the ‘boundaries between the clinical and social aspects of client care’ are ‘hard to define’ (Abrams et al. 2019: 1979). As home care is composed of both relational and practical work, there is a ‘blurry line’ that ‘emerges between the homecare service worker’s professional role and her or his personal emotional investments’, and an ‘ability to handle those more or less invisible one-off cases that often arise in work with humans’ is sought-for in a permanent ‘interplay between physical demands, emotional demands, and organisational preconditions’ (Vänje and Sjöberg Forssberg 2021: 46; 51).

Domiciliary care arrangements also involve organisations which orchestrate the provision of services and social support (see Dussuet and Ledoux 2019; Hoedemakers et al. 2019; Andersson and Johansson 2021; Sutcliffe et al. 2021; Rostad et al. 2023). Home care systems in Western Europe exhibit different configurations concerning related responsibilities. In some nations, public authorities ‘purchase’ services from non-state providers, based on decisions of commissioning bodies (see, Davies et al. 2020, for the case of England). The responsible bodies constitute an important place for collective agency in the above systems. In addition, (quasi-)public sector experts and professionals (e.g., social workers) are entrusted with need assessments relying on reports composed by doctors or other medical experts. In most cases, the establishment of formal care arrangements that are paid, or subsidised, by welfare state programmes presupposes the intervention of these evaluators. Should several services intervene in parallel, a need to coordinate them may arise as well. In some countries, public authorities run (care or case) management schemes through which users access services; elsewhere, special organisations provide advice and guidance within the jungle of LTC systems.

In what follows, all agents involved in the shaping of publicly (co-)funded care arrangements for home-dwelling users are referred to as case managers. The nature of their activity is multifaceted. First, claims for public support have to be verified, given that they may involve entitlements to benefits. This pertains to both the assessment of actual states of impairment and the interpretation of needs in terms of personal care, given that many jurisdictions grant

home care entitlements in the light of support available from other sources. Under these circumstances, social service units check whether claimants are surrounded by others such as family members with a capacity to ensure the continuity of everyday life (Dussuet and Ledoux 2019; Andersson and Johansson 2021). Accordingly, despite obvious care needs, an assessment procedure may end with claims being turned down, at least partially. At the same time, ‘older people may also develop strategies to hide their needs’ (Andersson and Johansson 2021: 296), being too proud or reluctant to accept strangers in their homes. In this case, the challenge consists of ‘seducing the elder person to change behaviours which could improve his or her quality of life’ (Kemper-Koebrugge et al. 2019: 977). Either way, the case managers’ intervention implies negotiation with users and their family (Olaison 2017). While case management also includes coordination with informal helpers, its key mission consists of identifying, and interconnecting, persons and (various) service organisations. In this context, case management implies a ‘negotiation on sharing care tasks’ (Kemper-Koebrugge et al. 2019: 974), as well as efforts to properly activate a multidisciplinary service infrastructure and to liaise with relevant actors (including funders, care inspectorates, etc.), each obeying their own regulatory and policy framework (Manthorpe et al. 2019; van Bovenkamp et al. 2020). Thus, case managers are often faced with the challenge of ‘implementing, coordinating and communicating a person-centred model of care across the many health- and social-care structures’ of a given LTC system (McDonald et al. 2019: 503).

In analogy to the method applied for the other two (sub)fields scrutinised in this book section, the subsequent Table 14.1, concerning the area of personal care provision for home-dwelling elderly people, reflects relevant evidence contained in (multiple) case studies and the many dynamics of collective agency illuminated therein. Again, the four research categories depicted above structure the re-examination of this evidence. Table 14.1 lists some publications on evocative cases, indicates further sources with valuable insights and provides key observations inferred from the reviewed literature which are spelled out in what follows.

(A) The more recent literature on how organisations involved in personal (domiciliary) care respond to (*evolving*) *external prescriptions* suggests a strong influence of regulatory environments on collective agency internationally. With efforts to extend and ‘de-institutionalise’ LTC provision, both the orchestration of, and caregiving in, domiciliary settings became a key issue for public regulation, geared towards making sure that involved organisations delivered in tune with policy objectives (see Chapter 9). In many European jurisdictions, the building of home care systems entailed the creation of agencies with a remit to devise service packages and monitor their delivery. The respective arrangements were often based on both formal contracts with care organisations and systematic quality inspection. Given both pro-market reform movements and a New Public Management (NPM)-driven reshuffle of the sector from the 1990s onwards, the wider scholarship dealing with the development of personal care settings suggests that external prescriptions have enforced more streamlined practices, regardless of the complexities inherent in home care arrangements as depicted above.

This first of all holds for case management processes. Various studies point to a strong interference of agencies with a remit to assess needs and orchestrate the caregiving process (Bode and Streicher 2014; Hayes and Moore 2017; Strandås et al. 2019). A case in point is given by Olaison (2017) who explored related dynamics in the Swedish LTC system. Participating at assessment conversations and comparing the latter with records

Table 14.1 Condensed scoping review relating to domiciliary personal care

	Evocative case study evidence	Other sources with relevant insights	Manifestations
Compliance with external prescriptions	Bode and Streicher 2014; Hayes and Moore 2017; Vånje and Sjöberg Forssberg 2021.	Bolton and Wibberley 2014; Cunningham et al. 2021; Hayes 2017; McDonald et al. 2019; Knijn and Hiah 2020; <i>Olaison 2017</i> ; Ravalier et al. 2019; Strandås et al. 2019; Sutcliffe et al. 2021; <i>van de Bovenkamp et al. 2020</i> .	<ul style="list-style-type: none"> <li>– Streamlined domiciliary personal care in line with public policies.</li> <li>– Case management with built-in restrictions concerning responses to needs.</li> <li>– Lean administration in the caregiving process, caused by institutionalised (time) pressures.</li> <li>– Patient-centred care pressurised by formalised conditions for service delivery.</li> </ul>
(Latent) idiosyncrasy	<i>Andersson and Johansson 2021</i> ; Manthorpe et al. 2020; Strømme et al. 2020.	<i>Deusdad et al. 2016</i> ; <i>Dussuet and Ledoux 2019</i> ; <i>Jaspers and Steen 2019</i> ; Emberson and Trautims; 2019; Hayes 2017; Hoedemakers et al. 2019; Kemper-Koebbrugge et al. 2019; Manthorpe et al. 2020; Skinner et al. 2021; Vånje and Sjöberg; Forssberg 2021.	<ul style="list-style-type: none"> <li>– Case management fraught with subjectivities and bias.</li> <li>– Negotiation of tasks in home care settings being incident- and relations-driven.</li> <li>– Individual response to tension fields nested in ambiguous social relations at work.</li> <li>– ‘Manipulated’ division of labour and biased co-production within domiciliary caregiving arrangements.</li> </ul>
Conservative praxis	<i>Olaison 2017</i> ; Sandberg et al. 2021; Turner et al. 2020.	Abrams et al. 2019; Albert et al. 2022; Backhouse and Ruston 2022; <i>Baxter et al. 2020</i> ; Bode and Streicher 2014; Cunningham et al. 2021; <i>Deusdad et al. 2016</i> ; Hansen and Neumann 2023; Manthorpe et al. 2020; Pollock et al 2021; Sutcliffe al. 2021.	<ul style="list-style-type: none"> <li>– Pragmatic need assessments to make (incompatible and diverse) regulatory norms work.</li> <li>– Informal and hands-on case management to consolidate a user’s care trajectory.</li> <li>– Caregiving as subjective juggling of fuzzy requirements, including the use of extra work to manage bottlenecks and to fill gaps.</li> </ul>

	Evocative case study evidence	Other sources with relevant insights	Manifestations
Transformative agency	Bergschöld 2018; Madama et al. 2019; Giraud et al. 2014.	<i>Dussuet and Ledoux 2019</i> ; Hoedemakers et al. 2019; Rostgaard and Graff 2023; Strandås et al. 2019; van de Bovenkamp et al. 2020.	– ‘Normalisation’ of generous entitlements after need assessments, by exploiting loopholes in the regulation. – Defence of professional ethos in practical contexts. – Collaborative attempts to make elderly care more accessible, holistic and seamless.

*Note:* Case management is shown in italics.

in associated case-file texts, she found that involved case managers with a social work background handled requests for home care in line with NPM-driven governance models. These provided care recipients with a freedom of choice but also tended to ‘limit professional discretion by defining tasks and formalising front line decision’, with this fostering ‘increased entrepreneurial thinking’ and decisions linked to ‘financial costs and tighter resource allocation’ (ibid: 79). The study illuminates how in this context requests were ‘negotiated away, added, or renegotiated and repackaged to fit within the framework of a publicly defined problem’. It also reflects a ‘bureaucratic mode of handling older people’s needs’ (ibid: 93) and difficulties for case managers to adapt requests ‘on a situational basis’ (ibid: 94). Van de Bovenkamp et al. (2020), scrutinising initiatives for the orchestration of domiciliary care services in the Netherlands, echo this observation. Their study conveys that, over the last decades, mainstream home care providers have (long) felt to be exposed to what they refer to as ‘regulatory pressure’ emanating from various external actors (funders, care inspectorates, etc.) involved in the governance of frontline services. Arguing that this pressure is prone to ‘diminish the sense of ownership among caregivers’ (ibid: 278), the authors depict difficulties in developing a well-performing network of involved professions and providers. Bode and Streicher (2014), in their multiple case study dealing with the interplay of regulatory frameworks, the management of care agencies and frontline work in domiciliary care settings in France, Germany and Luxemburg, come to similar observations. Their study reveals a widely perceived influence of administrative prescriptions concerning the types and periods of intervention, and of the ‘codification and standardisation’ of mainstream care processes by (quasi-)public authorities (ibid: 132, own translation). Various mechanisms were found to streamline home care provision, including payment rules and metric performance control. The funding systems were based on the reimbursement of predefined acts, which led providers to devise strict schedules with fixed time slots. Managers were aware of some activities remaining unpaid while trying to invoice users as self-funders. Respondents described their day-to-day practice in terms of a ‘taylorised’ labour process obeying an ‘industrial logic’ (Bode and Streicher 2014: 132), with ‘just-in-time’ caregiving arrangements based on part-time employment and interrupted work shifts as a frequent result. A follow-up study in a big German city showed

that personal care services, while being more malleable at the frontline, could eventually not escape this movement towards formalisation (Albert et al. 2022).

Concerning the frontline delivery of personal care, Hayes (2017) expands on this in her ethnographic book on the working life of personal care staff in the UK. A major theme in her book is that 'legal protections at work and legal protection of work are frequently problematic, inaccessible or unenforced' (ibid: 1) because public tenders and service delivery contracts 'very rarely include any reference to terms and conditions of employment' (ibid: 6). Her book offers a thick description of the lives of UK care workers and foregrounds the interface between public regulation and managerial practice. It depicts how a (quasi-) market regime reduces 'the occupational craft of caregiving to one of care-for-hire and advances the deregulation of labour by combining the unregulated qualities of familial care with the economic qualities of enterprise' (ibid: 27). A study by Cunningham et al. (2021), portraying experience with supervision schemes of home care organisations in Scotland, presents similar conclusions. According to the authors' findings, extant regulatory frameworks in this jurisdiction have diminished 'opportunities and time for supervision' (ibid: 189) and training, both deemed crucial when it comes to mastering the skills of care workers. Despite an expansion of 'care worker's roles and skillsets' due to a growing demand for personalised care (ibid: 191), the involved organisations appeared unable to provide their staff with discretion over how to accomplish their tasks. In the eyes of the authors, this was owing to 'intensified forms of management control' and 'cost-cutting through the introduction of lean management' (ibid: 191). Induced staff shortages and over-burdened line managers were found to prevent care organisations from offering supervision and left care workers overwhelmed (ibid: 196; 198). Ravalier et al. (2019) concur with this, showing that this pattern particularly affects the care workforce employed in the non-state sector and, most strikingly, agents under a so-called 'zero-hours contract' (featuring an unfixed number of working hours). Their study equally found care settings fraught by 'chronic workplace stress', with employees feeling a 'lack of control over their working situation' (349; 352), in part because of shortcomings of services provided by other caregivers in parallel. Sutcliffe et al. (2021), investigating the roles and responsibilities of UK home care providers addressing people with dementia, show that organisational leaders internalise the logic of public governance in this area, resorting to 'terminology from social care policy' (ibid: 60), although front-line managers grappled with 'the inflexibility of commissioned visits, staff turnover, or logistics and arranging visit timetables' (ibid: 62). In the setting under study, home care packages purchased by local authorities were based on a 'time-and-task approach, with services delivered in prescribed time slots, tightly specified and funded' (ibid: 59). Although ensuing dilemmas were acknowledged by managers, directors and owners of home care organisations alike, many advocated enhanced efforts to optimise the 'matching process', that is, the initiation of workers in relation to preferences of clients. Bolton and Wibberley (2014), dealing with domiciliary care settings in the same jurisdiction, concluded that ambitions to achieve cost savings are widespread among funding agencies (local authorities in their case). Providers were found to obey to an imperative of income accumulation under competitive pressures, spurring a constant search for increases in labour productivity.

Likewise, Strandås et al. (2019), portraying home care arrangements orchestrated by Norwegian municipalities, found numeric targets chasing welfare organisations and



their workers (nurses in this case) in various instances. Staff were expected to ‘manage service allocation within decided budget frameworks’ (ibid: e2), which often resulted in fragmented visits and lack of caregiver continuity. In many places, budgetary restrictions were sensed to urge employees to prioritise certain acts ‘at the expense of compassion, caring, and quality’ (ibid: e6), in part because many tasks remained undone or postponed even when informal caregivers were performing tasks ‘that legally are the responsibility of public services’. Vänje and Sjöberg Forssberg (2021), studying work environments in publicly provided home care services in Sweden, conveyed a similar impression. Their analysis starts with the observation that care work has become ‘more intense’ under the influence of ‘industrial production concepts’ and a steering model based on performance indicators. The authors found tight time schedules that ‘did not allow for ... unforeseen incidents’ and left workers with ‘little control over their time’ (ibid: 49). First-line managers reported a ‘feeling of powerlessness’ while carers saw themselves exposed to ‘a vicious circle of doing work ... that was neither valued for its complexity nor included in the formalized work descriptions’ (ibid: 50–51).

Relatedly, Hayes and Moore (2017), in their research on the electronic monitoring of home care workers in England, illustrate the impact of monitoring schemes for activities performed in the elderly people’s homes. Their study focuses on a telephone-based technology to oversee care delivery and deliver information to local authorities that commission domiciliary services from (mainly) private-sector providers. In a context in which purchasing bodies exercise a high degree of control over prices, services were being paid for ‘only for contact time’, which incited providers to collect real-time data about ‘home care workers’ whereabouts and visit durations’ (ibid: 334). This approach entailed ‘a disjunction between paid time and working time’ (ibid), with ‘work-on-demand scheduling’ and unpredictable working time slots, some of which remained unpaid. While visit times and their duration did often not match with official care plans, workers confessed ‘that they had little choice but to behave in ways that put the correct operation of the telephone system at the centre of their attention’ (ibid: 336). Employees felt ‘under huge pressure in situations already charged with emotions’, making them function ‘like machines’, even as the control scheme was judged to strip ‘care of its interactive flexibility’ (ibid). This resonates with findings of McDonald et al. (2019) who elaborate on home care services in Ireland. The authors argue that, given the regulatory frameworks introduced in the recent past, ‘time has become a commodity to be “saved” and “managed” through techniques more suited to business than person-centred models of care’. The regime in force was found to imply ‘time-specified visits to service users’ and ‘cumbersome paper-based documentation’ (ibid: 502). With a growing proportion of services devolved on private sector providers, services were observed to use ‘strict work scheduling to focus paid work hours at high demand’ (ibid: 503). In this context, caregivers were ‘lacking the power to organise their work ... from the point of view of sensible time management’ (ibid: 508) and ‘relayed frustrations’ given a quasi-industrial organisation of care work and reduced space for person-centred activities and companionship.

(B) Like child protection and active inclusion work, domiciliary elderly care is nested in organisational settings with a built-in *potential for idiosyncrasy*. Recent research on these settings bears witness to dynamics through which relevant welfare organisations may circumnavigate external prescriptions for the sake of their own concerns and interests. In

some instances, these organisations seem to have the power to ‘go their own way’ without (fully) conforming to their official mission. Thus, it seems that processes of case management – which have remained a public responsibility far and wide – lend themselves to idiosyncratic organisational behaviour. Scrutinising needs assessments for a social welfare board in a Swedish municipality and personal judgements in the related decision-making, the previously mentioned study of Andersson and Johansson (2021) highlights tensions ‘between national standards, local guidelines and individual needs which the care managers have to handle in practice’ (ibid: 294). Given that regulatory frameworks only contain rather vague provisions regarding entitlements to public support, the involved agents were found to be urged to negotiate multiple perspectives and to resort to personal convictions when confronted with the individual situation of families claiming public support. The authors exemplify this by describing the encounter with migrant families. The latter were suspected to seek support to achieve a ‘next-of-kin employment on monthly salary’ (which is one option contained in the relevant regulatory framework). Some agents reasoned that older people with migrant backgrounds intended to replace public care services with family caregivers – although local guidelines defined this solution as an exception. Claimants were assumed here to abuse the welfare system, thereby accepting a low quality of (lay) care and reproducing the ‘gender trap for women carers’ (ibid: 299; 302). This suggests a propensity among case managers to categorise claimants in subjective ways, as well as via ‘overprotective decisions in contradiction to the preferences of the applicant’ (ibid: 302).

Such space for idiosyncrasy has also been identified by Dussuet and Ledoux (2019) who stress the role of stereotypes impacting upon the decision-making process of public agents entrusted with needs assessments in France. Their study, based on participant observation of assessments effectuated by six territorial welfare departments, reveals how the fabrication of help plans – which induces decisions on payments and types of services provided – may depend on subjectivities shaping an evaluation process. The procedure was found to provide assessors with a certain room for manoeuvre as they could assign more or less support for users and related lump-sum packages. Driven by ideas about the ‘ideal’ family, some evaluators seemed to ‘insist on “loving” relations between spouses’ and ‘encourage spousal solidarity’; others intended to ‘forestall exhaustion in unpaid family members carrying out care work (ibid: 600–601). A similar scope for discretion is identified in work by Deusdad et al. (2016) who scrutinised strategies of public social workers in a Spanish city. These agents were expected to manage a tight budget and long waiting lists for publicly funded personal care services. In the absence of any official criteria, they were obliged to make person-centred decisions on entitlements based on subjective perceptions regarding the degree of dependency and the resources of the applicants.

Similar observations have been made concerning experiences with frontline service delivery, revealing a potential for practical idiosyncrasy in this realm as well. First of all, this potential has grown with the rise of for-profit provision throughout large parts of Western Europe. While private ownership is not necessarily a source of ‘mission drift’ in the sense that all service providers automatically neglect the latter for the sake of making profits, commercial service delivery may exacerbate dilemmas inherent in contemporary LTC systems. Studies from countries in which private sector provision is the dominant pattern suggest that microeconomic considerations influence human resource policies and

service delivery models in many places, with this entailing particularly complex relationships between ‘social benefit and commercial gain in the home care work sector’ (Turner et al. 2020: 2229–30; see also Hayes 2017 and Mercile 2021). Whatever the ownership status of providers in the contemporary LTC system, home care workers have often been found to carve out their own ways of dealing with the ‘grey zone consisting of formalized and institutionalized work tasks, and work tasks that are hidden but expected to be performed’ as Vånje and Sjöberg Forssberg (2021) express it for the case of Sweden. In their study, many caseworkers displayed commitments ‘to stay positive and not complain’ (ibid: 45), yet much seemed to depend on their individual emotional investment and their personal relation with users. As Knijn and Hiah (2020) imply in their reflections on experiences in different European countries, home care is often performed in an uncertain or ambiguous social atmosphere. Among other things, this is susceptible to generating ‘an educative, almost patronizing stand’ (ibid: 160) which professionals experience in their encounter with care recipients. The direction of collective agency under these circumstances seems to be indeterminate in important respects.

Idiosyncrasy is also inherent in cash-for-care arrangements through which users are empowered to make decisions affecting caregivers. In this context, subjectivity matters as the ‘the dependency relation is turned upside down’ (ibid: 171, with respect to experience from Austria). This is echoed by findings from a study of Emberson and Trautrim (2019), probing into experiences of English care workers employed by private households on direct payments from local welfare departments. Interviews with case managers brought to the fore that this arrangement invited care recipients (and relatives) to subject their caregivers to their free will – for instance by withholding wages due to dissatisfaction with their service, demanding excessive overtime work or using intimidating and threatening behaviours (including physical or sexual abuse). While the latter may be the exception rather the rule, available research suggests that the home care encounter is imbued with complicated social relationships in terms of dependency and self-direction on both sides of the work relationship which therefore harbours a huge potential for idiosyncratic behaviour.

In addition, notwithstanding huge differences between European home care systems, the distinctive division of labour established within these systems does not come without repercussions. Those involved may be led to retreat into the shell of their specific occupation and concentrate on their entrenched domain, rather than being sensitive to the multiple dimensions of a given care arrangement. In their ethnographic research on personal care workers in Western Norway, Strømme et al. (2020) found significant discrepancy in the ways that caregivers engaged with the remit of monitoring their patients’ health, that is, noticing and responding to a patient’s conditions, for instance by checks of vital signs and nursing documentation. Against the background of ‘enhanced patient acuity and ... heavier workloads’ (ibid: 2430), care workers were unsure about what to monitor and often took highly subjective decisions in that respect, with many employees finding it hard ‘to remain updated in patients’ conditions’ (ibid: 2436). While this uncertainty had various reasons, self-referential professional identities seemed to be a crucial role here. Indeed, the very fact that domiciliary home care proves to be a multi-professional undertaking is a source for idiosyncrasy in relevant instances. Manthorpe et al. (2020), illuminating the negotiation of professional boundaries in UK home care arrangements for people with dementia, show that personal care staff frequently faced those in other occupations in ways

that were tension-ridden. These staff, crossing paths with district nurses and working in rotation with privately paid live-in care workers, were generally ‘seen as low status’ (ibid: 577) and felt at times excluded from formalised teamwork. Concomitantly, some district nurses expected personal care workers ‘to undertake responsibilities more appropriate to a clinical professional’ – which, in turn, prompted personal care workers to ‘make explicit their ability to only deal with non-medical tasks’ (ibid: 576). Given such power dynamics among collaborating occupations in the home care field, open-ended conflicts are likely to occur and are susceptible to becoming infused with profession-specific ideologies. There is much evidence on the dynamics of demarcation at the boundary line between different occupations in the home care field. The interface of cleaning work and personal care is a case in point. True, most studies dealing with domiciliary caregiving suggest that this boundary is blurred in the employees’ praxis, and sometimes the two roles are contained in the same job description. This notwithstanding, personal care workers have been found to distance themselves from the stigma of being ‘just’ a home help doing practical chores (Hayes 2017: 22). Likewise, according to findings of (Manthorpe 2020 et al.: 578), trained nurses are expected to concentrate on ‘improving the tangible, functional aspects of a client’s wellbeing’ rather than dealing with social aspects of the home care encounter. In the study of Strømme et al. (2020: 2438), nurses appeared to cultivate a ‘collaborative distance’ between themselves and care assistants, bemoaning that the latter ‘lacked confidence in their judgements of patients’ clinical situations’.

Similar observations are contained in a Dutch study conducted by Kemper-Koebrugge et al. (2019), dealing with the structuring of home care arrangements in organisational networks which embraced informal caregivers, health professionals, external service providers for activities of daily living (pedicures, hairdressing), volunteers and personal care staff. According to the authors’ observations, ‘formal care providers saw professional boundaries as reason not to interfere with family relations’ (Kemper-Koebrugge et al. 2019: 978), arguing that they were not therapists. The negotiation of tasks was mostly incident- and relations-driven within these networks – which is a further source of idiosyncrasy throughout the sector.

This resonates with observations by Hoedemakers et al. (2019), portraying initiatives to provide integrated care for frail elderly persons in the same jurisdiction. Their findings hint at tenacious barriers for inter-professional collaboration in this realm – which has been a seminal theme in the wider literature for many years (see Leichsenring 2004). The initiatives under study were geared towards overcoming the ‘silo-thinking’ prominent in contemporary home care systems – especially in a country lacking a ‘single professional or organisation that is truly responsible for coordinating care and support’ (Hoedemakers et al. 2019: 1–2). Integrated care programmes, based on project grants and extra funding from healthcare insurers, were expected to involve all relevant caregivers (including general practitioners (GPs)) around a selected number of severely impaired elderly people. While this was an ambitious attempt to change the rules of the game (see below), the study identified problems concerning ‘the ease and effectiveness of collaboration between GP-practices and the social care sector’ (ibid: 6). In addition, there were ‘burdensome negotiations’ with health insurance companies, given the latter’s ‘continuous request of convincing effectiveness evidence’ (ibid: 7). One can conclude from this experience – and

similar evidence – that even under favourable conditions, the situational momentum of inter-organisational relations may easily prevail over institutional prescriptions.

Situational dynamics may also shape the collaboration between informal and formal caregivers. For instance, the previously mentioned study by Kemper-Koebrugge et al. (2019: 979) found that, on many occasions, ‘homecare and welfare volunteers did not navigate together’. Research by Jaspers and Steen (2019), exploring how local public servants in Belgium helped users to organise mixed care arrangements, identified struggles with volunteers as ‘co-producers’ of domiciliary support. Thus, the project coordinators had to cope with the limited reliability of volunteers. Similarly, Skinner et al. (2021) point to blurred responsibilities and collaboration problems in the encounter of informal and formal care work within Norwegian municipalities. Professional staff meeting private caregivers expressed the ‘feeling of an added workload in an already hectic work situation’ (ibid: 651). While there was no intention to entrust volunteers with ‘tasks and responsibilities that had to do with personal care’, distorted information chains and uncertainty about ‘who was doing what’ made the related interface difficult to master (ibid: 650). Although registered nurses sent by the municipality laid down in a document ‘what kind of tasks the informal caregivers would perform’ (ibid: 652), they ‘expressed reluctance toward taking the initiative to establish binding agreements with informal caregivers’ (ibid: 651). In a nutshell: If it comes to home care arrangements involving different stakeholders, professional self-image, power games and status concerns all create a potential for ‘organised’ idiosyncrasy.

(C) Some strands of the literature on personal care in domiciliary settings suggest that deviations from rules and prescriptions may be highly functional for the fulfilment of the wider mandate given to welfare organisations in this field, namely, the tasks of facilitating ageing in place and making care relationships work under complex circumstances – and with limited resources in many places. Hence, recent case studies display *conservative praxis*, in the sense that organisations from the home care field seek flexible ways to ensure the most essential chores are done while often being unable to fully comply with their mission, let alone to consistently conform to (more) emancipatory goals. This first of all holds for case management processes. As noted, administrative staff in LTC systems must match regulatory frameworks with the (often complex) living conditions of care-dependent citizens, basically by running assessments and assigning entitlements, including personal budgets. In doing so, they not only adjust needs to regulatory frameworks but also mitigate emerging tensions. This is nicely pictured by the study of Olaison (2017) mentioned above, showing that case managers in Swedish municipalities handle requests for (potential) home care recipients by adopting a multifaceted role as ‘administrators, gatekeepers, and collaborative partners with the different types of organisations’ (ibid: 80). While decisions in assessment meetings were framed in tune with institutional prescriptions (see above), Olaison found that the claimants’ requests ‘underwent some type of negotiation between the participants in the conversation’ before being processed as a case file, with managers sometimes geared towards bringing in ‘new services that were over and above the requests that the older people had at the start’ (ibid: 84). Moreover, case managers had to get to grips with clients deflecting offered services, discussing the scope of support independently from what users had claimed. Thus, they were ‘trying to practice the core nature of social work by using a care rationale approach ... in relation to the limited space that exists within

the managerialistic requirements' contained in the policy framework they were exposed to (ibid: 95). Similar insights are conveyed by other studies dealing with case management in domiciliary elderly care. Baxter et al. (2020), exploring experiences of self-funders in the English home care system (those not eligible to a publicly funded personal budget), mention that local authority case managers mitigate problems in this system by flexible action 'off the record'. Their study illustrates that these agents, having a remit for 'support planning, brokerage ... and management of budgets', occasionally deviated from the interdiction of recommending users specific providers in the competitive care market, by bashing providers they deemed to be poor performers (ibid: 468). Staff were also found to filter information for users, as 'difficulties in navigating the care system left people feeling overwhelmed' (ibid: 470). Likewise, in their study of LTC policies in a deprived Spanish municipality, Deusdad et al. (2016) show how involved social workers filed flexible responses to cuts in the elderly care programme, operating a 'change in practice from service-led public resources to using resources of NGOs [non-governmental organisations] and fostering volunteer involvement' (ibid: 256). Instruments for this included the mobilisation of charitable resources and the authorisation of NGOs for organising volunteer home visits, in order to enable elderly care arrangements under adverse circumstances.

Efforts to align complex or even contradictory institutional prescriptions with practical conditions have also been found for frontline care work in domiciliary settings. A nice illustration of this is provided by Sandberg et al. (2021) in a case study exploring how home care staff in Sweden perceive and respond to the situation of fragile care recipients. They observed that the acceptability of condition-related risks was 'often determined through a process of balancing the rights and needs of the person with dementia' (ibid: 1702), given a tension between the requirement of patronising such users and commitments to maximise their psychological well-being. This tension was felt to arise, for instance, when carers altered the latter's home environment and privacy. Collective agency was found to cope with this dilemma in pragmatic ways, as workers defined their role as an 'alarm system' and were keen to 'advocate who could alert others' (ibid: 1704). While 'home care staff were left alone in the work situation' and felt exposed to 'high job strain', employees developed techniques to keep risks under control, for instance by searching for signs indicating peril (e.g., burn marks on pots and pans, or an odour caused by a previous fire) and attempting to 'influence the mood of the person' looked-after (ibid: 1704–705). In many instances, such activities were not specified in formal job descriptions, hence care workers sought individual solutions for responding to situational requirements. Similar dynamics are shown by an ethnographic study Hansen and Neumann (2023) conducted in a public home care agency of a Norwegian municipality which had abolished a more hierarchical (NPM-based) governance model. In the day-to-day, investment into team-led coordination work appeared as a 'collective strategy ... to fulfil ... obligations', but agents at street level individually remained 'responsible for solving the gap between demands and resources in their encounters with individual service users' (ibid: 12).

Various studies dealing with home care provision suggest that, under the conditions of a (partially) marketised LTC system, work beyond job descriptions is endemic to many organisational settings. Bode and Streicher (2014), in their comparative study of domiciliary services in Germany, France and Luxembourg, revealed the structural character of logistical problems arising from their back office. Exposed to the uncertainties inherent in

domiciliary arrangements and their impact upon the duration of visits, managers counted on an informal adaption of frontline workers to potential imponderables. However, their praxis was geared towards keeping this adaptation process under control – an orientation which the authors refer to as the ‘re-appropriation of service management’ (ibid: 133). A further organisational strategy consisted of involving staff in selling privately paid extra services to users once needs remained uncovered by social security funds. This was also evidenced by a follow-up study focusing on personal care services in a big German city (Albert et al. 2022). This research equally demonstrated how both middle managers and frontline workers were emotionally juggling with the challenge of prioritising some needs over others in order to avoid major distortions in service relationships. Exposed to a complex division of work with paramedical staff, care workers employed for housekeeping, social company and attendance work were constantly absorbed by finding provisional solutions to spontaneously arising problems. Users often interpreted the worker’s role as being holistic while top managers wanted the workers to delimit their commitment, given a tough day-to-day service schedule and tight (social security) budgets. Here as well, collective agency served as a mediating force between policy and praxis, managing bottlenecks and filling gaps in an LTC system.

Studies undertaken in Anglo-Saxon parts of Europe offer further, fine-grained portrayals of this configuration. Turner et al. (2020) used reflexive diaries and interview material to describe work roles in English domiciliary care settings. The latter’s labour force, suffering from ‘low pay, lack of training, irregular hours, and the low status of care work’ in this country (ibid: 2221), was found to use ‘own resources in the form of time, money, goods, cognitive skills and affective capabilities to perform tasks which went above and beyond their everyday work’. In many instances, the completion of encountered work tasks required ‘considerable empathy and ingenuity to meet the ... needs of service users in challenging situations’ (ibid: 2225). An important element of collective agency consisted of what the authors label ‘affective voluntary labour’, impregnating the workers’ occupational identity and sometimes even becoming a ‘primary source of job satisfaction’ (2225–6). This included providing support ‘outside hours’ and worries ‘about a service user after they had left’ (ibid). While not specified in their employer’s official policy, there were ‘tacit organisational expectations’ to do the ‘extra mile’. All this ‘required careful calibration’ on the side of the staff. Staying longer with one user risked triggering a ‘domino effect on the day’s schedule’ which, along with the unpredictability of travel time between service users, ‘placed homecare workers under pressure’ (ibid: 2229). Moreover, for the staff under study, the benefits accrued from extra work ‘did not appear to outweigh the material costs’ (ibid: 2228). The study also found more pragmatic attitudes towards absorbing energy into a worker’s free time, yet their flexibility was perceived as indispensable to ease pressures arising from the various demands of the job. All in all, top managers welcomed this orientation, pointing out that their recruitment policies focused on ‘the affective capabilities’ of their staff (ibid: 2221).

Findings of Sutcliffe et al. (2021) in a British study mentioned earlier suggest that this quest for flexibility also affects coordination processes within the (UK) home care system. Providers, bemoaning the inflexibility of the regulatory framework under which they deliver their services, expressed a need to have a workforce capable of managing this inflexibility at the frontline. Thus, ‘qualities of emotional intelligence ... such as excellent

communication skills, social skills, and compassionate natures were actively sought by managers during recruitment' (ibid: 66). This is echoed by findings from Pollock et al. (2021) concerning the expectations of family-care givers in their encounter with formal care providers (using the same database as Turner et al. 2020, see above). On the one hand, respondents did not want to be 'subject to the scheduling priorities of an unreliable and impersonal service' and insisted on 'punctuality' as this was seen to enable them to maintain routine (ibid: 2065). On the other hand, they appreciated engagement going 'beyond the remit of the job' and care workers bringing in 'experience and skills from their personal lives' and 'innate caring abilities' (ibid: 2066). While work relationships were interpreted differently – some respondents considered formal caregivers as 'fictive kinship' while others seemed to view them 'in instrumental terms' (ibid: 2066; 2070) – care-recipients and their relatives 'expressed little interest or awareness of the home care workers' terms and conditions of employment, rate of pay or the logistical challenges they encountered in the course of delivering care' (ibid: 2068). Thus, flexible collective agency is expected as a matter of principle, and the onus for ensuring it lies on care organisations and their staff. This observation is corroborated by the study of Backhouse and Ruston (2022), which sheds light on the professional experience of English home care workers supporting people affected by dementia. Organisational arrangements led employees to 'multitask' and 'leave non-urgent tasks uncompleted' but also to find ways to cope with 'refusals of care' of users (ibid: 752; 755). The findings suggest that staff were faced with the challenge of 'enacting the caring relationship' (ibid: 756) by using 'their own abilities', for instance 'distraction techniques' and 'communication strategies', to perform the most essential tasks (ibid: 756; 757). Similar results emanate from research by Cunningham et al. (2021), which pictures the care workers' experience with access to training and supervision in Scotland. Many interviewees confessed 'that they performed tasks outside normal working-time', along with 'variable work rotas and shift patterns ... altered on a weekly basis by management to fill gaps due to absence and turnover' (ibid: 195). Moreover, as training and supervision was felt to be poorly developed, formal caregivers reported to 'engage in informal, non-workplace learning through networking with other workers, and research internet sources' (ibid: 194). Similarly, Abrams et al. (2019), in their study on English care organisations, describe the 'blurring of role boundaries experienced by home-care workers', especially in end-of-life care settings. Although job descriptions and care plans served as a blueprint to manage the expectations of users, care workers found themselves urged to be 'available, flexible and adaptable' and find 'creative solutions', in particular for 'clients with limited decision-making capacity' (1983–5). They also came across users 'presenting a care request that was beyond the technical capacity' that the carer thought they had while meeting 'difficulties in refusing additional care task requests ... from family members' (ibid: 1984–5). Notwithstanding that their managers conceived of themselves as 'protective gatekeepers' and expressed a 'duty of care towards their staff', they 'often seemed to side with clients and their families if a conflict arose' (ibid: 1986) – which implies that flexible collective agency can easily clash with authoritarian leadership in the sector under scrutiny.

(D) In some instances, the 'makers' of welfare in the LTC sector may also become involved in *transformative agency*, that is, activities with a potential to develop the sector further – and even make it consonant with the emancipatory vision of social modernity. In



domiciliary settings, this happens when collective agency endorses opportunities for frail care recipients to live in a safe personal environment, in accordance with both their own preferences and the concerns of caregivers. This balance is difficult to strike, as exemplified by the research presented above (e.g., Sandberg et al. 2021). That said, a couple of studies from the home care realm in Western Europe reflect organisational behaviour with a potential to achieve progress in such respects. Concerning case management processes first of all, the research by Dussuet and Ledoux (2019) bears witness to the critical role of administrative actors in the implementation of LTC policies (in France). In this context, professional norms, although adapted to institutionalised contexts, appeared as a potentially strong vehicle for the empowerment of elderly people. The authors describe how evaluators entrusted with evaluating benefit claims and needs assessments were committed to design care plans in the best interest of the claimants. The professionals were found to carefully scrutinise the ‘specific situation of the elderly people concerned’, listen to the applicant ‘explaining their own social and medical trajectory’ and check the ‘immediate entourage’ of claimants, including pending family conflicts, risks of abuse and possible caregiver burnout (ibid: 598). This activity might be led by stereotypes that instil idiosyncrasy into the assessment process, as argued earlier. Moreover, in the field under study, rationing was a salient pattern. However, on many occasions, the praxis of composing care plans and assigning budgets to them contained a transformative momentum as it was geared towards defending user rights by forging generous home care arrangements despite perceived policy restrictions. On the side of the involved professionals, this indicates a potential for making extensive entitlements ‘normal’, including through the exploitation of loopholes in the regulation. Similar observations have been made for other settings (Deusdad et al. 2016; Andersson and Johansson 2021).

Transformative collective agency in the home care sector may also materialise in the defence of professional ethics in ways that endorse a more holistic mode of support by frontline staff. Bergschöld (2018), studying the use of time and technology in Norwegian home care organisations, notes that workers tended to defy attempts to industrialise care work by usurping control instruments modelled on ‘tayloristic ideals of efficiency’ (ibid: 4). In his fieldwork, he explored the application of a time-saving IT technology, introduced with the aim of streamlining home visits in the temporal dimension. To avoid a conflict with ‘ethical ideas of care’, care workers were found to transform this tool into a device they strategically used to ‘produce and maintain a professional identity’ (ibid: 5). Operating in a context of permanent shortage of service hours, homecare workers expressed the feeling that their ‘ability to perform their work’ hinged on their ‘capacity to make time’ (ibid: 11). They developed ‘methods for cutting visits to home-care recipients short’ where this appeared appropriate, while distinguishing ‘between acceptable and unacceptable methods’ and ‘between wasteful and purposeful uses of time’ (ibid: 11–12). Rather than understanding the software as a stopwatch, care workers made use of the possibility to align it with what they thought was supportive care and ignored the time signals from the tool. Keen to ‘to save time without depriving the homecare recipient of anything he or she needs’ (ibid: 14), they argued with administrators concerning time schedules, even as using more time without compelling reasons was considered as ‘unprofessional’ (ibid: 16). While the study left open whether this organisational behaviour impacted upon the development of the above tool and the wider work environment, collective agency was found to

create opportunities for transforming entrenched management models and adapt them to what frontline ‘makers’ of welfare deem indispensable. Transformative agency may also be triggered by institutional incentives which local actors translate into innovative praxis, as Rostgaard and Graff (2023) suggest in their study about ‘reablement care’, conducted in two settings in Denmark. The approach of reablement became included in the official mission of the Danish home care sector during the 2010s, with all interventions expected to help care-dependent elderly people regain independence in daily activities. Based on a multi-sector, holistic and person-centred rationale, a key idea of the concept consists of concentrating on subjective preferences of care recipients. While the roll-out of the concept was government-driven, care workers were found to proactively develop routines to implement this concept on the ground, by making use of enhanced flexibility in planning and executing care work while responding to the users’ needs in more individualised ways.

As case studies from different countries suggest, transformative agency is also encapsulated in collaborative initiatives seeking to make elderly care more accessible and more coherent. Madama et al. (2019) have reviewed a number of local projects in the North of Italy that were aimed at improving the access to personal care by creating what the authors label ‘inclusive local care environments’. Among the projects under scrutiny, one initiative relied on a partnership between a municipality and a charitable foundation trust. This initiative sought to create a ‘single point of access’ (ibid: 132) and an integrated administrative scheme run by network managers with a remit to monitor the integration of nursing assistance, domestic visits and personal care and hygiene. This was found to elicit considerable progress within the quite patchy LTC system of the jurisdiction in question. Further goals consisted of the identification of vulnerable users by collaborating with local voluntary associations and of the nomination of a ‘care planner’ with a remit to design home care arrangements with families and volunteers. While collective agency in this context was unable to substantially extend the (weak) system of formal care provision, it reflects a capacity of welfare organisations to invest themselves in combating perceived shortcomings of the home care endeavour. Likewise, Giraud et al. (2014), exploring trajectories of innovations in local home care systems in Germany and Switzerland, found initiatives driven by the idea of making these systems more user-friendly, for instance with respect to opportunities of frail elderly people to socialise among each on a regular basis. They describe the history of a project organising collective lunches for meals-on-wheels users in a Swiss city, initiated by units of the cantonal association of LTC service delivery and of the city’s social services. The concept spilled over to the local non-profit sector and attracted the interest of representatives of the local welfare administration. A second example provided by the authors is the instigation of local care conferences in a German agglomeration, aimed at improving communication and coordination amongst various parties involved in the LTC system (private, public and associative forces, as well as individuals and beneficiaries). Initially, these conferences were geared towards ‘counter-balancing the general market orientation’ of the regulatory framework for domiciliary care in Germany (ibid: 441). In the course of time, they morphed into a (small) forum for professional reflection and information-sharing concerning specific public health issues. Interested in similar dynamics, van de Bovenkamp et al. (2020) present findings from a Dutch case study on projects that were geared towards reducing regulatory pressure on domiciliary care work at the local level. In the settings explored by the authors,

entrenched institutional rules had often been perceived as ‘limiting the situatedness’ of professional support and colliding with a user’s needs (ibid: 278). This experience led local professionals to develop tools to overcome the ‘decoupling ... between management and professional caregivers, between professional caregivers and family members and/or residents and between external organisations’ (ibid: 280). One of the projects sought to give staff ‘the opportunity to report on rules they considered problematic’ (ibid: 278), triggering ‘a discussion of its functionality by managers and professional caregivers, thereby recoupling the work of these actors’ (ibid: 278–9). A second initiative sought to combine the introduction of a unified care budget with the creation of ‘comfort zones’ in which local staff were invited to reflect on the quality of care (ibid: 280). In this context, care teams could use ‘the regulatory space created for them to make their own rules’ and enable a sense of control (ibid: 279). Hoedemakers et al. (2019) portray similar dynamics in integrated care projects for frail elderly persons in Dutch municipalities. These projects were aimed at counteracting the ‘silo-thinking’ of the many stakeholders and organisations operating in the home care field. Some providers developed a ‘Care Chain Frail Elderly’ system using project grants and additional funding from healthcare insurers to offer integrated care to a group of users selected on the basis of geriatric assessments. A multi-disciplinary team devised individual care plans, and the execution of these was monitored by a nurse practitioner. Informal caregivers and users were invited to participate. Service provision was incumbent on care groups, comprising primary care providers (contracted by healthcare insurers) as well as professionals from the social care sector. While care recipients were reluctant to participate in the meetings and doctors hesitated to embark on ‘collaborations with the social care providers’ (Hoedemakers et al. 2019: 8), the new format was found to unburden informal caregivers and to reduce red tape. According to the authors’ observations, this made a notable difference to the previous situation.

# 15. Six lessons to learn: contributions and limitations of 21st century ‘makers’ of welfare

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A general impression conveyed by the preceding analysis is that the engine room of contemporary welfare states appears to be convoluted. With the transition to the post-industrial configuration, the ‘makers’ of welfare are faced with more complex task environments, even as their organisations (must) play a more proactive part within more dispersed landscapes of welfare provision. Change in these territories has come with growing diversification and constant specialisation, both entailing ‘job enrichment’ and a new division of labour. To be sure, increasing differentiation and novel challenges concerning the orchestration of separate places and rationales are typical features of modernity. That said, in the area of organised welfare provision, disparate developments run in parallel. On the one hand, the dynamics portrayed in Chapters 11 to 14 suggest that modern society is inventive when forging responses to movements of economic or social change – simply because it can resort to organisations that specialise in distinctive activities and deliver results in systematic and enduring ways. In this dimension, collective agency in welfare organisations has become more sophisticated over the last decades. On the other hand, the territories explored above contain numerous stumbling stones for those willing to shape arrangements according to their mandate, let alone in ways amenable to a fair balance between different social groups and interests. The following will discuss the wider lessons to be inferred from the analysis conducted throughout. This will be undertaken in light of the observations made in the book’s theory section concerning the evolving foundations of public institutions, on the one hand, and the dynamics intrinsic to modern organisations, on the other. The first step consists of describing the changing interface between institutions and organisations as well as the evolving inter-organisational relations throughout the fields under study here. Secondly, the wrap-up below will infer general conclusions from the evidence on the role of the ‘organisational factor’ within twenty-first century welfare sectors. Finally, the insights gained from the ‘quasi’-scoping reviews will be briefly discussed in relation to observed welfare outcomes and – once again – read through the lens of the analytical grid developed in Chapter 2, in order to assess their fit with what was defined there as key principles of social modernity.

## 15.1 INCONSISTENT MOVEMENTS: MORE AND LESS POWER TO ORGANISATIONS

Diving into the deep waters of the organisational settlement of twenty-first century welfare states in Western Europe, one discovers a recalibrated relationship between institutions and organisations. When considering extant task environments, collective agency related to organised welfare provision seems to be more comprehensive than ever before in the history of the modern nation-state. At the same time, formal devices featuring in public bureaucracies and

legal frameworks have changed in ways that suggest a reduced role of institutional forces in the ‘making’ of welfare arrangements. At least, politics and states in the early 2020s seem to have a less direct influence on organised welfare provision than 40 or 50 years ago – and, to some extent, these dynamics are grounded in an altered orientation of welfare programmes as depicted earlier in this book. In addition, social change has made major task environments more complex. In this vein, welfare arrangements and related intervention processes have become more decentralised in many places – hence, more power is given to organisational praxis. To wit, Western European welfare states have seen growing ambitions to ensure both an immediate and flexible response to child maltreatment and expect a situated coordination of various professions in a local case management process. Likewise, despite the proliferation of formalised procedures, the ‘activation’ agenda for employment services has entailed more decentralised casework, including within active inclusion projects. Similar dynamics have been triggered by the personalisation of domiciliary elderly care.

Furthermore, as shown above, public bodies have often slimmed down their direct connection to the ‘makers’ of welfare over the last decades. In the recent past, this was driven by movements of deregulation, out-contracting, corporatisation and the public management mantra of ‘steering instead of rowing’. Overall, with the transition to the post-industrial configuration, state interference appears less ‘whole-hearted’ throughout many areas of organised welfare provision. In some countries, this trend is more implicit, as non-state organisations have played a major role within relevant welfare sectors from early on. In this case, state interference has become more subtle over the last decades, due to weaker ties between the partners ‘in public service’. Elsewhere, social intervention activities have been newly devolved to non-state organisations. More than ever before, the ‘makers’ of welfare, at least those operating outside of the state administration, are faced with both greater responsibilities and enhanced need for taking self-contained action. Non-profit organisations operating at arm’s length of the state administration often liaise with the wider (civil) society and hence draw on motivations other than bureaucratic or commercial orientations. In the universe of for-profit service provision, the discretionary character of collective agency is even more salient. As illustrated throughout this book section, private companies have pervaded various welfare sectors over the last decades. In cultural and economic terms, they are more strongly decoupled from public institutions than most of their non-profit counterparts. Their relative autonomy may be used to reshape the ‘terms of trade’ within these sectors, for instance by developing new products or offering services at a lower price than non-profit competitors, in order to flourish within a given domain. That said, the boundaries between institutional spheres are not clear-cut. On the one hand, for-profit organisations have become powerful stakeholders of the welfare state and are likely to lobby for public programmes; moreover, they are subject to external prescriptions which are unknown in other parts of the (capitalistic market) economy. On the other hand, in view of their institutional power, they frequently appear as a Trojan horse that has introduced instrumental orientations to entire welfare sectors – which comes with a potential to pervert the latter’s moral underpinnings, for instance by transforming users and workers into market commodities.

In light of all this, it seems fair to conclude that, given the ‘complexification’, outsourcing and corporatisation of welfare provision internationally, the ‘organisational factor’ has grown in importance. This is a first overarching lesson to draw from the analysis in this section of the book. At the same time, the recent decades have seen numerous efforts of (quasi-)public

authorities to develop tools with a potential to (re)gain control over organisational processes at the street level. Seen from this angle, public institutions have remained deeply involved in the orchestration of organised welfare provision. This pertains, first of all, to benefit schemes under direct state oversight, despite partial movements of privatisation and retrenchment. The reshuffle of these schemes from the 1990s onwards has often come with enhanced conditionality and, by extension, with increased efforts to ensure a more fine-grained control of (case) management processes – which has restructured the inner life of the involved agencies accordingly (employment services, municipal welfare departments, etc.). Concerning the provision of human services, the above efforts materialise in a remodelled interface between non-state providers and (quasi-)public authorities, as developments in the (sub)fields portrayed above clearly indicate. Internationally, public welfare bodies have taken initiatives to pre-structure case management processes, sometimes with a focus on ‘hard cases’ and poor households. In this vein, non-state organisations have been exposed to more formalised accountability procedures specifying what they are required to deliver. In contemporary Western European welfare states, many of these organisations work under standardised mandates, ‘value-for money’ contracts and tough quality inspection schemes. All this reflect attempts of public institutions to fine-tune activities at the street level. In many cases, these attempts connect with extended responsibilities of agencies that operate at an arm’s length from the public sector realm, namely commissioning boards, social insurance schemes or quangos. In this context, particular varieties of organisations endowed with institutional power govern other types of organisations. For the ‘makers’ of welfare, this may have variegated consequences. On the one hand, institutional governance may entail compliance with objectives contained in the project of social modernity – provided that institutional prescriptions align with this project. On the other, formal prescriptions may run counter to such objectives and provoke mission drift within relevant organisational settings, in the sense that involved actors (have to) pursue side goals such as to operate at full capacity, to concentrate on mere procedural norms, or to respond to what public tenders require in terms of deliverables.

Hence a second lesson to be drawn from our analysis is that while some organisations in the welfare universe of Western Europe have become more potent in recent times, others, or some of their units, prove to be less powerful than in earlier days. Indeed, during the last decades, institutional change in Western European welfare states has triggered specific dynamics of procedural rationalisation within these units. To be sure, rationalised action is a typical feature of modern organisations and often contributes to effective collective action. Where public bodies or quangos try to enforce such action in a given organisational field, this may contribute to a ‘correct’ implementation of extant regulatory frameworks. Furthermore, the extension of procedural rationalism often is a corollary of increased scope for the ‘organisational factor’ in twenty-first century welfare states. That said, the analysis thus far has shown that – in the above configuration of strong and weak players – an increased prerogative power of certain administrative agencies (government authorities, employment services, sickness funds, etc.) leads organisations with a remit to implement welfare programmes to rearrange internal structures and procedures according to externally produced agendas. This pertains to assessment processes and case management schemes as well as to frontline service provision, with many ‘makers’ of welfare eventually operating under tougher working conditions and with less discretion in their professional practice.

It should be noted that this overall development is corroborated by social change outside of the universe of organised welfare provision. As has been argued earlier in this book with reference to the scholarship illuminating the transition to post-industrial societies, shifts in employment norms devised in the area of industrial relations and at company level have had various repercussions on the social fabric of European societies in general. Welfare arrangements are deeply affected by this. Labour law deregulation and the marketisation of welfare schemes have altered the conditions under which citizens apply to, and make use, of welfare programmes, as evidence from case studies in the area of active inclusion work and elderly care brings to the fore. The spread of precarious employment contracts and imposed working time flexibility impacts upon the task environment of many welfare organisations. In addition, the ‘quasi’-scoping reviews above display a changing role and character of informal norms related to organised welfare provision. Major examples of this include the decrease, or lack of, social reputation, which hits major occupations and professions in the welfare field broadly speaking, as well as the business culture pervading the public sector and non-profit sector, crowding out the authority of non-economic expertise within relevant organisational settings. At the same time, the analysis in this section of the book points to counterbalancing trends. Among other things, these trends are related to the sheer growth of the welfare workforce, the persisting expectation of ‘publicness’ in the organisation of welfare provision, and the emergence of civic (often bottom-up) initiatives seeking to renew or extend welfare arrangements in the public and non-profit sector. All these developments suggest the persistence of zones for value-based collective agency within relevant organisational landscapes across European welfare states – and, more generally, a potential of various ‘makers’ of welfare for developing organisational praxis in line with the vision of social modernity.

## 15.2 MULTIPLE DYNAMICS: THE ORGANISATIONAL FACTOR UNDER CLOSER INSPECTION

The re-examination of past research above suggests that much of what happens within welfare organisations is rooted in regulatory frameworks and related institutional expectations – concerning, for instance, the focus of activities, procedural issues and relations to co-actors. The evidence also indicates that the ‘makers’ of welfare often deviate from extant prescriptions, by carrying out their own agendas, performing in individualised ways, bending professional norms, or pursuing economic interests while partially neglecting a given mandate. Moreover, the literature under review points to attempts to resist perceived restrictions and to launch innovative initiatives, with a potential spill-over into the sphere of politics. Altogether, considering the period between 1980 and 2020, the dynamics underway seem variegated – the organisational factor makes itself felt in inconsistent ways, with repercussions pointing in different directions. Against this backdrop, a further (third) overarching lesson conveyed by the above scoping reviews could be bluntly expressed this way: don’t put too much of your faith into the ‘makers’ of welfare – at least when you expect them to be a self-sufficient source of emancipatory social development.

To explain, modern organisations, including those involved in welfare provision, exhibit a wide range of idiosyncrasies – and as the evidence collated for the reviews illustrates, some of these idiosyncrasies induce important limitations for the vision of social modernity to thrive. At least, research into day-to-day routines in twenty-first century welfare organisations

suggests that collective agency often goes astray from official missions. Manifestations of this include the dark sides of public bureaucracy (inertia, red tape, formalism), a priority given to (micro-)economic issues, battles over the roles of professional concepts, personal interaction styles involving spontaneous judgements at street level, and the attachment to 'special philosophies', for instance those which (co-)exist in the variegated universe of the non-profit sector. Moreover, the case studies re-examined above imply that the welfare workforce may use professional power and discretion to delimit their accountability and devolve incumbent tasks to others. Idiosyncrasy is also produced in struggles over the division of labour between different occupations or organisational units, including when the task environment requires collaboration between several parties and the latter is undermined by ego-centric network members. Furthermore, case managers and frontline staff often resort to instinctive solutions to wicked problems (as the field of child protection nicely illustrates) and spontaneous responses to locally perceived priorities and needs (which is particularly prominent in domiciliary care services). While such flexibility is often needed to preserve the functioning of welfare organisations, it may also be a result of self-centred reasoning and action. In addition, notwithstanding a certain potential for resilience, many 'makers' of welfare seem unable to withstand external pressures in critical situations, including in cases where these are perceived as impeding organisational performance according to professed missions (for instance sustainable work reintegration). Fatalism, detachment and disaffection are possible implications.

At the same time, institutional prescriptions are fundamental to organised welfare provision, as argued earlier in this book. This is a major lever by which environments make formal prescriptions matter to routine activities of welfare organisations. Hence the very rationale underlying a given set of prescriptions seems to have a strong influence – whether or not this rationale conforms to emancipatory values. Partial deviation from rules is possible in many instances (see below), yet altered regulatory frameworks can restructure organisational practices in substantial ways – for instance by institutionalising case management methods (within employment services), by risk monitoring (e.g., in the area of child protection) or through concepts for service provision (e.g., in the field of personal care to frail elderly people). Considering the evidence collated in this book section, all this leads us to a fourth overarching lesson: institutions that materialise in public regulation can have a significant impact upon collective agency at organisation level, with the nature of this impact depending on both the character of this regulation and the movements of social change that influence underlying policies.

In the recent past, such change has certainly induced constraints for organised welfare provision. Thus, it has prompted funding restrictions for many European welfare sectors, arising from the reluctance of 'big business' and (upper) middle-class citizens to dedicate a higher proportion of above average incomes to social spending. Furthermore, the upswing of the financial service industry from the 1990s onwards has had a strong impact upon the organisation of income replacement schemes as these have become more market-driven in many instances. In addition, cultural factors at society level have left their traces in relevant organisational settings and entire welfare sectors – including new understandings of what constitutes a 'correct' approach to welfare provision. Among other things, they have materialised in novel management hype and governance models, such as social entrepreneurialism, New Public Management (NPM), 'value-for-money' thinking (to please funders or donors), and austerity politics, that is, a felt necessity to publicly 'pamper' the private business sector. The



spread of such models was often buoyed by hopes to achieve the same (welfare) outcomes by spending less money. The growing influence of business interests on public policies has spurred the 'normalisation' of tool-kits developed by private corporations and management consultants, with concepts from this realm (such as internal markets, pay for performance, 'customer orientation') impregnating the cultural political economy of human service sectors internationally. Various studies exemplify how agents and managers from various welfare sectors have adopted related views from outside of their organisational universe.

However, institutional influences on organised welfare provision have gone in different directions over the last decades, and some have come with a potential to enforce organisational praxis in tune with emancipatory values. This, for example, applies to the human rights agenda instilled into the institutional settlement of democratic capitalism during that period. It seems that such an agenda creates an atmosphere in which organisational actors seek to endorse such rights in pro-active ways, for instance when it comes to checking entitlements to benefits for impaired citizens. The same holds for professional work in child welfare services and efforts of (re)establishing an elderly person's capacity to live a self-directed life. In many places, the scope for this praxis has been enlarged over the last decades, given that the three (sub)fields covered by the literature review above have seen an institutionally enforced extension of organisational missions. In this context, the 'makers' of welfare have been led to systematise efforts to avoid any form of child maltreatment, to coach jobseekers or to take a broader look at the prerequisites of 'ageing in place'. Hence, to some extent, recent social change in the environment of their organisations has altered practices in ways susceptible to the empowerment and promotion of disadvantaged citizens.

Nonetheless, when taking the vision of social modernity as a yardstick, new public regulation has often dovetailed with perverse effects in relevant organisational settings (and for their users). Indeed, what has been said above about the power of regulatory frameworks also manifests itself in how formal prescriptions affect collective agency in practical terms. Public management is a crucial factor here. Since the 1980s, European societies have seen various attempts to make this management more intrusive, with this entailing procedural rationalisation in the sense discussed earlier. Internationally, business reengineering projects have mushroomed in both public and non-state welfare organisations, including those with a potential to promote child empowerment, ensure decent work, or create conditions of a safe old age. With greater complexity in the organisations' task environments, this development is often perceived to menace the quality of welfare arrangements and to put strain on the operational capacity of agents who may feel urged to apply inappropriate devices under tough working conditions. Thus, within many welfare organisations across Western Europe, casework related to the assessment of benefit claims has been streamlined (including through the use of IT tools), even as human service provision has come to be based on standard procedures in many places. Management models have often come to comprise enhanced specialisation and less holism, the proliferation of neo-bureaucratic governance (featuring rigid templates for casework) and the implementation of meticulous control systems, concerning, for instance, the administration of benefit conditionality or external time monitoring in human service provision. A case in point is caregiving in domiciliary settings, with workers being squeezed between concepts for flexible, patient-centred (personal) care and procedural restrictions endemic to the above management models. Likewise, welfare-to-work providers often obey external instructions in ways that undermine the logic of co-production of active inclusion trajectories, which is

widely felt to complicate the achievement of sustainable solutions for long-term jobseekers. Interestingly, institutional influences with perverse effects can be based on both symbolic 'perfectionism' and regulatory laxism. Concerning the former, the zero-error culture pervading child protecting work, epitomised by growing attempts to double-check reported incidents and agreed decisions via formal control systems (with a focus on visible risks), has deterred family welfare services from more creative and patient forms of social intervention and has nurtured a tendency towards satisficing behaviour on the job. Laxist procedural norms come into play with the deregulation of the human service infrastructure and the delegation of tasks to providers under economic pressure. While contracts agreed between purchasers and providers are highly formalised in many jurisdictions, there is no, or little, regulation specifying how the 'makers' of welfare should (and are enabled to) manage the imponderables related to the implementation of these contracts – which makes it more challenging to guarantee high quality services on the basis of appropriate skills and favourable working conditions (which, for instance, has been a big issue in the field of elderly care internationally).

Somehow paradoxically, non-conformity to the aforementioned intrusive pressures may help stabilise a given institutional mandate. Indeed, a fifth lesson to derive from the condensed scoping reviews above is that, irrespective of the content of public regulation, flexible collective agency is critical to the functioning of modern welfare states, and, given the growing importance of the organisational factor as argued above, ever more so. The reviewed evidence suggests that, in important respects, organised welfare provision in twenty-first century Europe eventually rests on a loose connection between devices and makers, that is, regulatory frameworks and collective agency within organisational settings. Major reasons for this include the ambiguities contained in evolving frameworks and indeterminacy concerning the mandate of typical welfare organisations. Most 'makers' of welfare are prepared to 'do their job' even under difficult circumstances and hence serve as a ('conservative') stabiliser of the established societal order. In the new millennium, they have maintained some leeway to go their own way, in part because they are urged to make extant devices align with inconsistent policy agendas and overly complex task environments. While reflecting opportunistic behaviour on some occasions, their day-to-day praxis indicates procedural flexibility on various occasions. It is striking to see how collective agency in various welfare sectors is coming to grips with experienced trouble, despite a low control over evolving task environments. For instance, a good deal of research on the child protection field points to the workforce's strong resilience against inevitable adversities – even though perceived pressures are at times mitigated by narrowing down extant missions (for instance by attempts to delimit an organisation's turf). Likewise, service providers in the area of active inclusion policies adapt the latter to complex situations found at the street level, for example by seeking a 'lean' balance between the supporting and regulating elements of policy frameworks when dealing with their clientele. Such proactive pragmatism may also include strategies that put things 'on hold' or reinterpret rules contained in a given welfare scheme. This is exemplified by collective agency in the field of personal care provided in the elderly people's homes, where pragmatic need assessments, informal and hands-on case management, as well as spontaneous responses to unspecified or inconsistent service requirements often appear as a 'must' in the day-to-day routine of frontline staff. Arguably, this flexibility contributes to sustaining the balance of power entrenched in contemporary democratic capitalism. In this sense, the 'makers' of welfare are a major source of energy for the reproduction of this assemblage. Importantly, this observation also pertains to

for-profit provision, as commercial organisations interested in developing their own domain contribute to the consolidation of a given welfare programme or industry within the related institutional context – notwithstanding that they may trim down certain quality standards and spur competitive dynamics that eventually undermine equity norms. On balance, the organisational settlement as described in this book section seems to contain a potential for defending achieved ‘states’ of welfare provision as well as for producing outcomes despite growing restrictions.

Again, movements of social (and economic) change as pictured in Part II of this book make themselves felt here, impacting not only upon regulatory frameworks, but also on the organisational settlement of twenty-first century welfare states. On the one hand, there are growing expectations against welfare organisations as such and their potential to interact with citizens in need. On the other, in many Western European jurisdictions, a good deal of organised welfare provision rests on a deregulated labour force, which forms an important pillar of the post-industrial ‘service economy’. Developments in domiciliary home care are telling here, as this industry embodies the international trend towards precarious work and low-paid employment in larger sections of this ‘service economy’. Concomitantly, the flourishing of the latter has concomitantly induced growth in the better-skilled health and social service workforce. As this workforce has often been found to be ‘stressed’ by both rising expectations and increased management pressure, however, the overall picture is one of frequent strain and recurring bottlenecks, with workers or case managers feeling exhausted or frustrated. While this has caused apathy in many places, both industrial action and protest movements (which have become more vigorous in the early 2020s) hint at pockets of resistance, with the participants often enjoying considerable popular support.

This takes us to a final lesson to be drawn from the ‘quasi’-scoping reviews above, resonating with the observation of proactive pragmatism, but going beyond it. Under certain circumstances, twenty-first century welfare sectors in Western Europe exhibit collective agency transcending the here and now. In other words, part of the forces inhabiting these sectors contribute to developing the organisational settlement of welfare states in ways compatible with elements of the vision of social modernity. At least, collective agency at organisation level sets limits on what might be named regressive transformation. To be sure, large sections of child and family welfare services, active inclusion work and the home care industry all operate within the confines of what legal frameworks, organisational hierarchies and powerful stakeholders are claiming. In particular, the ‘makers’ of welfare receive resources only as long as they (seem to) satisfy the respective expectations. However, throughout the fields under scrutiny in this book, we find various actors crafting or developing novel approaches that partially correspond to the above vision. In their role as experts and practitioners with a remit to both ‘manage’ cases and fine-tune social intervention, they enjoy authority and discretion to enact their mission and co-shape their universe by what organisational theorists label institutional work (or social innovation), that is, initiatives susceptible to influencing, or even transforming, both generalised expectations and policy approaches. In the (sub)fields under study in this monograph, past research has identified mechanisms through which the ‘makers’ of welfare engage critically with their remit and make a creative use of related zones of discretion. Thus, part of the child protection workforce is not only immersed in informal agency to thwart imposed agendas but seeks a proactive interpretation of its empowerment role, including through networking activities which help cultivate their professional authority and

sometimes deploy collective 'militancy'. Moreover, their territory is populated by pressure (or advocacy) groups that espouse emancipatory values. Concerning active inclusion work, such collective agency materialises in experiences of certain social enterprises – whereas in the area of domiciliary elderly care, it may affect the process of need assessments through which the involved workforce reframes the zone of reference concerning what is considered 'normal' in the entitlement to benefits. In administrative and street-level work settings alike, this is apparently endorsed by professional ethics geared towards making services more accessible, holistic and seamless at the local level.

Assumedly, the organisational 'energy' for all this is fuelled by two movements of social change that have affected Western Europe during the last decades – that is, a fresh supply of an 'appropriate' welfare workforce and the boost of civil society organisations as stakeholders of the wider welfare infrastructure. As outlined earlier, both the growth of the academic middle-class and the increasing participation of females in gainful employment have been key characteristics of the evolving labour market internationally, even though the rate of growth has been lower in Mediterranean countries. Both push and pull effects seem to matter here, meaning that social change fosters newly formed organisational fields while these fields produce, or reshape, the norms constitutive of a given welfare sector, including in terms of professional orientations. Thus, over the last decades, contemporary European nations have generated numerous 'natural' stakeholders of organised welfare provision. This also pertains to part of the civil society realm. In recent times, initiatives from this realm have contributed to 'modernising' relevant frameworks and organisational models, both through political lobbying and practical initiatives related to concrete welfare arrangements. Such initiatives can always serve as an incubator of new projects, a source of welfare advocacy or simply a thorn in the flesh of mainstream politics. It holds true that, during the last decades, such initiatives mostly had a single focus, remained limited in scope and often failed at improving the well-being of the less privileged sections of the European citizenry. Nor could they prevent the deregulation of labour markets or the advent of NPM. In addition, the social forces backing such initiatives have concentrated within more affluent (middle-class) milieus, paying limited attention to classical 'working class' issues and the structural dynamics of capitalist economies. Nonetheless, various examples suggest that civil society organisations and their constituencies form a backbone of more emancipatory forms of organised welfare provision, hence this universe is a potential source of transformative agency within twenty-first century democratic capitalism.

### 15.3 THE 'MAKERS OF WELFARE' AND OUTCOMES OF COLLECTIVE AGENCY IN THE NEW MILLENNIUM

It goes without saying that the analysis undertaken above is not suited to gauging the material effects of collective agency deployed throughout the different sectors under study. In many fields, outcomes of organised welfare provision in terms of human well-being are hard to measure, let alone by a limited number of in-depth case studies. However, with our broad enquiry into the organisational settlement of twenty-first century welfare states in Western Europe, some general conclusions regarding these outcomes appear plausible when recapitulating the evidence collated in the preceding chapters.

First of all, this evidence suggests that, in various instances, idiosyncrasies at the organisational level make social administration units and human service agencies underperform in relation to what one might imagine under circumstances free of such idiosyncrasies. Although systematic social intervention is unthinkable without modern organisations, certain kinds of collective agency within their confines induce frictions at the expense of users and target groups. In some ways, the devices invented by the modern nation-state – that is, institutional norms encapsulated in regulatory frameworks – are partially suspended by ‘makers’ of welfare. Even in a world in which these devices (would) fully resonate with the vision of social modernity, organisational settings in typical welfare sectors exhibit dynamics with a potential for curtailing their mission – be it because agents use available discretion to pursue ‘subjective agendas’ or because the identities or values at play collide with each other, both within and between involved organisations. In complex societies, organisational praxis will never be as ‘neat’ as are institutional prescriptions for it ‘on paper’.

Secondly, however, some devices developed or ‘reformed’ over the last decades exacerbate such inconsistencies and create (additional) frictions taking effect at the organisational level. Manifestations of this include excessive paperwork, enforced compliance with (dysfunctional) workplace control schemes, and staff attention shifted to make organisations ‘competitive’ or profitable in economic terms. Indeed, past research bears witness to enforced or incentivised forms of management which entail (enhanced) discrepancies between missions and outcomes of organised welfare provision – although proponents of these tools (have) expect(ed) the contrary. Various observations on the repercussions of NPM imply that, in many instances, these tools have reinforced such discrepancies whatever the generosity of public programmes. In many ways, they risk making child protection less comprehensive, active inclusion less sustainable and old age less safe. Hence, outcomes become more uneven throughout the welfare sectors under study in this book – even in cases where NPM arrangements are not (or hardly) associated with cutbacks and programme retrenchment. True, the evidence on conservative praxis across various settings suggests that the ‘makers’ of welfare at the frontline can mitigate some of these frictions when institutional prescriptions turn out to be inappropriate in the light of a given mission. However, the more rigid such external prescriptions seem to be, the more difficult are proactive pragmatic responses at street level (in the sense discussed above). As conservative praxis in contemporary welfare organisations is predicated on available discretion for involved agents, imperative external prescriptions are likely to render these responses more intricate. This pertains to regulation that imposes fixed time slots or budgets per ‘case’, to welfare programmes subject to the logic of ‘output for money’, and to inspection regimes sanctioning procedural errors in mechanical ways. All these forms of procedural rationalisation are likely to entail perverse effects simply because the complex endeavour of organised welfare provision requires room to breathe in the production process. While such rationalisation may save money in the short term, it risks damaging the wider organisational infrastructure of twenty-first century welfare states as it prompts, among other things, workforce burnout or revolving door effects due to short-sighted and precipitate social intervention. Conversely, more lenient forms of public management, together with a more comprehensive mandate assigned to the ‘makers’ of welfare, are prone to facilitate responses to the wicked problems that caseworkers and administrative staff encounter in their domains. This is suggested by evidence on child protection systems and their family orientation in main-

land Europe, active inclusion schemes in countries like France and home care arrangements in some Nordic jurisdictions.

Thirdly, concerning the interface between institutions and organisations, transformative agency in settings entrusted with the administration or provision of social welfare (writ large) is more likely to occur in permissive institutional environments. In other words, the execution of discretion is often fundamental to forging welfare arrangements in line with (emancipatory) Enlightenment values. The examples drawn from the literature re-examined throughout indicate that such agency often occurs with a softer or more dispersed public management regime, for instance in countries with great(er) discretion left to local stakeholder communities or decentralised territorial divisions. This, for instance, applies to home care networks in North-Western Europe and innovation projects developed by profession-led child welfare units under arm's length local authority governance. Again, institutions matter greatly – as they may constrict or facilitate such collective agency. At the same time, for institutions to make a difference, they need 'makers' of welfare who are experienced and committed to the public cause, or at least proactively support their target groups in empathetic ways.

Given these varieties in the interplay of institutions and organisations throughout the fields under scrutiny, one can conclude that the organisational settings of twenty-first century welfare states are a 'mixed bag'. In many instances, the 'makers' of welfare prove a power resource for the devices invented by the social forces shaping the institutions of democratic capitalism. As it seems, their realm is 'too big to fail', notwithstanding that its very impact and performance largely depend on the nature and orientation of institutional environments. Under certain conditions, this resource may become weaker or be shifted to other purposes, including profit-making under conditions of privatisation and (quasi-)market competition. In the jurisdictions considered throughout this book, however, the various landscapes of organised welfare provision (still) contain energy reserves susceptible to keeping emancipatory values 'on board' and developing the toolset of relevant welfare sectors further.

This, finally, leads us to the question of the relation of twenty-first century welfare organisations to the vision of social modernity. Revisiting the analytical grid developed in the theory section of this book, we can conclude that the respective role for the 'makers' of welfare proves to be variegated. To begin with, collective agency in welfare organisations essentially contributes to providing support for human beings under strain, often irrespective of what the latter (have) contribute(d) to society in terms of (economic) pay-offs. While the related organisational performance is predicated on institutional backing (both in degree and scope), the DNA of many managers and caseworkers considered here contains elements that are conducive to setting this principle of social modernity on the agenda again and again – be it by exploiting available zones of discretion for seeking pragmatic solutions to wicked problems, or be it by developing extant toolsets further (at least in incremental ways). In many instances, committed welfare bureaucracies, human service professions and leaders of major non-profit organisations defend welfare programmes that disregard economic merit accumulated by their clientele. This ethical orientation is also prominent among many employees of privately owned welfare organisations. As for public bureaucracies, including those in charge of benefit schemes, agents are generally led to serve all citizens in equal ways – which corresponds to the above principle as well. While practices largely depend on legal frameworks, case studies suggest that these organisations have remained populated by actors who try to use the space in the rules of extant entitlement schemes to the best interest of users – besides others who

abide by mere administrative (NPM) prescriptions or have given up on their fate in a context of enhanced work process control. Having said all this, there is no guarantee for welfare organisations conforming to emancipatory value in all instances, even as extant institutional pressures frequently prevent them from doing so.

Secondly, it is obvious that many organisations entrusted with managing benefit schemes can do little in honouring human effort regardless of the claimants' (current) market value. Agents involved in these organisations may check entitlements with a concern to do justice for any case they are dealing with, yet they have no leeway in aligning payments with what they think should be honoured. Concerning human service provision, typical welfare schemes target citizens with limited or reduced market value, which implies that there is no direct agenda for the 'makers' of welfare here, except when it comes to selecting users when resources are rationed. However, respect for people 'trying their best' – for example as a parent or a young adult – is contained in the culture of many social service professionals and welfare organisations more broadly. Moreover, the latter have recurrently been found to lobby for change concerning enhanced public efforts to empower deprived users by developing benefit and social support schemes accordingly. This, for instance, pertains to child and family welfare schemes or programmes for work(re-)integration. Arguably, a strong non-profit sector driven by such considerations contributes to producing such efforts, irrespective of the extent to which this sector is providing tangible (social) services. That said, market orientations have grown in importance where non-state providers gain income from attracting users and have to compete with peer organisations. Under these conditions, the moral conviction that people deserve support as full (adult) citizens regardless of what they represent in terms of market value may become less a source of motivation.

This leads over to the third element of the analytical grid related to the vision of social modernity, that is, the principle of personal self-direction. In twenty-first century Europe, welfare organisations are often expected to bring this principle to fruition, notwithstanding the many ambiguities contained in those regulatory frameworks that shape their remit. However, many 'makers' of welfare provision involved in the child and family welfare system, work (re-)integration programmes and elderly care have grown up in a paternalistic culture denying a user's right to have their own preferences. The case studies reviewed earlier point to 'temptations' to accommodate, or to fall back into, this pattern under institutional pressures that make managers and caseworkers subscribe to a give-and-take logic (e.g., in active inclusion schemes) or make quick decisions (in child protection and tayloristic home care arrangements). That said, as some of the above studies illustrate, organisational settings in these sectors continue to be populated by agents reflecting their professional ethos or at least their relationship with users according to a human rights approach – which appears to mitigate such organised paternalism. Thus, the participation of users and the philosophy of empowerment are important reference points in many of the child welfare organisations covered by the scoping exercise above. Likewise, active inclusion schemes are often infused by the idea of transforming marginalised people into self-sustaining citizens (again), even as domiciliary personal care to elderly people has a clear remit to help the latter maintain some degree of independence.

At the same time, contemporary welfare organisations obey institutional expectations and regulatory frameworks that delimit the respective missions in certain ways. Thus, reforms of child and family welfare schemes have prompted management models that urge caseworkers to make rapid decisions (concerning the custody of at-risk children) while reducing the

time for patiently interacting with users. In a similar vein, active inclusion policies have led welfare-to-work service providers to use 'quick-and-dirty' strategies in terms of training and job placements – without necessarily taking their clientele's preferences into account. The same applies to employment service agencies all over Europe. Hence, in different instances, the organisational praxis of many 'makers' of welfare undergirds regressive tendencies in democratic capitalism, and some welfare organisations (including for-profit providers) even seem to be sympathetic to related policy agendas or promote the latter by devising concepts and tools for its implementation. Therefore, when regarding current welfare states in Western Europe, the 'organisational factor' is a vital but uncertain resource of social modernity.



## PART V

# Diagnostic realism and possible futures: a synoptic view on the fate of social modernity

## OVERVIEW

This final part of the book will take stock of the key aspects that the preceding chapters have brought to the fore concerning both the ‘reality’ and the recent dynamics of organised welfare provision in contemporary Western Europe, before discussing possible futures. The analysis thus far has portrayed developments of both regulatory frameworks and organisational settings that influence the distribution of material wealth and opportunities for shaping a human life course in post-industrial times. To some extent, these arrangements reflect societal efforts to ensure social cohesion in the sense of finding balanced agreements within a given (national) collectivity. While also greasing the (capitalistic) machine of twenty-first century economies, such agreements often resonate with emancipatory Enlightenment thought and related ideas for human progress. In this sense, they epitomise a process of social modernisation.

According to the analytical approach underlying this study, social modernity is both a partial reality and a vision for the future. To recall the argument made in Chapter 2, that vision can be viewed as resting on three overarching principles that invoke distinctive moral values. There is, first, the idea of unconditional support to damaged, disadvantaged, or young people – irrespective of how much the latter can or will contribute to the wider community. Collective efforts in this direction signal concerns for human dignity. A second fundamental principle is enshrined in commitments to respecting (different kinds of) human work that are imbued with feelings of social justice and enable collectivities to honour individual efforts regardless of (current) market values. Third, there is ideational support for the promotion of (considerate) individual autonomy, which includes the development of the respective human capabilities. Using these three principles as a yardstick, Parts III and IV of this book have examined the evolving nature of those provisions by which European societies influence the living conditions of citizens in an institutionalised manner and by organised activities.

The following chapters recapitulate and interpret the insights gained throughout, providing a synoptic perspective on what has been collated in the previous sections of this book. The respective analysis is guided by a rationale that can be termed diagnostic realism. This notion, occasionally invoked by the scholarship in philosophical epistemology (see Brülde 2005), signifies an ambition to capture the present role of the vision of social modernity, as well as the factors that impede this vision from blossoming further. Espousing a critical realist epistemology, an assessment guided by this rationale helps ‘adjudicate between rival reality constructions’ (Porpora 2016: 73) concerning the development of (advanced) societies and may also serve as the groundwork for ‘imagining the future’ (Delanty 2021). Thereby, it

enriches our idiographic understanding of institutions and organisations that are fundamental to the evolving assemblage of democratic capitalism.

The interpretation of the book's findings in what follows is guided by the conceptual approach on which Part I has elaborated at greater length. Critical theory is used for interrelating findings on institutional change and shifts in power-infused social relations, both old and new. It is also employed for uncovering dynamics present in the organisational settlement of Western welfare states, for instance the expansion of rationalised models for collective agency. Concomitantly, the analysis is inspired by accounts from the field of 'cultural political economy' and by work dealing with social change in Western societies that, among other things, illuminates the spread of individualism and sentiments towards growing sociocultural diversity. Through these lenses, we can better understand both the ongoing – albeit often partial – influence of the above principles on extant welfare arrangements and related collective agency (Chapter 16) but also the fact that this influence has decreased in some areas and in certain respects from the 1980s onwards (Chapter 17). Thus, concerning the dynamics of organised welfare provision, we can identify the built-in emancipatory potential of extant institutions and organisations but also some stumbling blocks for human progress.

In a nutshell, the analytical message from what follows can be summarised like this: social modernity – as a vision for designing welfare arrangements – is alive, in demand, and feasible in technical terms although the post-industrial configuration has seen limits set to the aforementioned principles thriving (further), with the agenda of social modernity becoming more selective and bifurcated. These limits result from dynamics that can be encapsulated in the notions of dismantlement, disorganisation and dissociation and are primarily being produced by three sorts of mechanisms, namely: shifts in political power, the advent of managerialist technologies and the spread of 'personalised' solidarities. These mechanisms combine with the 'organisational factor' – that is, dynamics of collective agency and related sense-making within welfare organisations – to reshaping the chemistry of twenty-first century democratic capitalism.

As noted earlier, insights into these dynamics and mechanisms can also be used to gauge possible futures. Taking the vision of social modernity as a reference point, Chapter 18 discusses a range of options for welfare reform in the light of recent policy debates. The focus lies on regulatory ideas that are ingrained in the cultural repertoire of modern Western societies and which critical realism would understand as 'relatively enduring' while being subject to creeping adjustments (Archer 2014: 3). Various policy recommendations are scrutinised critically by using a distinction between fashionable yet ambivalent ideas, on the one hand, and approaches that (according to the principles of social modernity) can be viewed as being 'truly' progressive, on the other. Paying attention to recent movements of social change – that is, trends occurring on the 'backstage' of welfare arrangements (see Part II of this book) – the last chapter speculates about barriers and preconditions for these approaches to be implemented in the near future. In technical terms, the concepts for 'truly' progressive welfare reform will be put to a theoretical test concerning their 'fit' with the societal context in which they would have to be embedded.

## 16. Social modernity alive, in demand, and feasible

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This chapter draws on the analysis from earlier in this book in order to argue that, in the new millennium, important elements of the vision of social modernity continue to be part of the architecture of European welfare states. These elements, inspired by the three principles recalled above, are partially incorporated in both benefit schemes and human service programmes. Through these schemes and programmes – but also the collective agency associated with them – the principles are permanently re-enacted. Accordingly, even when losing momentum over time, underlying emancipatory ideas have remained in play – which implies that, in many respects, social modernity is alive.

The latter becomes apparent, first of all, when considering the devices in various areas of organised welfare provision. Thus, concerning institutionalised activities addressing the empowerment of children, comprehensive regulatory frameworks funnel enormous resources towards this target group, irrespective of their (unknown) ‘economic utility’ – and this trend seems set to continue. Granted, such investment into the offspring yields benefits to various sections of the population, including the power elites. Thus, there has been an increasing economic interest in an extended participation of mothers in post-industrial labour markets. However, in the case of early childhood education and care, twenty-first welfare states in Western Europe organise institutional support whatever the beneficiaries’ relative contribution to national wealth, given that the actual value-added benefit of such support (in the future) is uncertain and difficult to measure. Still more importantly, European societies in the new millennium would find it morally inadmissible to withhold support from children and young people who might be less productive than others. Hence, if both monetary benefits and social services addressing this target group have peaked in recent times, this can also be deemed an expression of a growing acknowledgment of human dignity as a moral value. While such support has recently been (re)framed as a ‘human capital investment’ by both politicians and academics, the strong echo of this discourse is likely to be grounded in the modern idea of every child ‘having a right’ to grow up in an empowering environment. In this vein, many European countries have seen new efforts to foster a parent’s or couple’s educational capacity from the 1970s onwards. Insofar as such backing is granted regardless of the (current) market value of the individuals targeted, it equally corresponds to distributional norms prominent in the vision of social modernity. The cross-national tendency towards more comprehensive youth support is corroborated by an increased awareness of children’s general vulnerability and thus commitments to make childhood safe(r). It signals a social justice orientation that is inherent in major regulatory frameworks that address universalist commitments to the welfare of children – including those ‘at risk’ –, regardless of the market value assigned to them or their parents. In this context, most European governments have put great effort into child protection services, including the stricter organisation of related social interventions. More

generally, and despite important inconsistencies (see below), the devices developed in the area of child and family welfare provision over the last decades bear a potential to foster personal self-direction, as they provide families and their offspring with resources which, under certain circumstances, may facilitate (more) autonomous decisions in the shaping of an individual's life course.

Similar observations can be made for devices that come into play when citizens seek access to decent work or need protection to maintain the latter. In this policy area, post-war welfare states in Western Europe have invented and maintained devices with a potential to repair some of the distortions caused by the capitalist economy. This pertains to employment protection schemes addressing waged workers, but also to work (re-)integration and active inclusion programmes that may secure, for some, a new work trajectory. Thus, to a certain extent, established regulatory frameworks provide shelter and support once people are in gainful employment (under certain conditions and for a limited period) – for instance in the event of sickness and work incapacity. In the latter case, this is (almost) regardless of what beneficiaries have previously contributed to the wider society in terms of economic outcome. Concerning unemployment benefits, support is often income-related even as minimum contribution periods apply – yet, otherwise, access to (basic) monetary support is universal in most jurisdictions, as far as national residents are concerned. Related entitlements can still be taken-for-granted by large sections of the Western European labour force. They are widely understood as being a human right and signal the relevance of social justice orientations (in the above sense) if it comes to catering for 'employable' citizens during their working age.

Furthermore, the options to access work-related human services including medical rehabilitation, while differing between welfare regimes and social groups, are seldom conditional on the market value of user groups. While collective investment in the supply and maintenance of human capital also provides benefits to those owning firms and 'traded' financial assets, these options nonetheless point to the (partial) influence of the value of human dignity in this realm. The last decades have seen new initiatives to extend and intensify efforts to bring disadvantaged or impaired people back into gainful employment, which might be understood as confirming shared commitments to the norm of decent work for all. Moreover, in most Western European welfare states, minimum income schemes serve as a (modest) universal safety net. Importantly, many of the respective arrangements provide workers with some leeway in making autonomous decisions regarding their life course – which undeniably makes a difference when compared with earlier stages of Western capitalism. Although the scope for such leeway has decreased in many places over the last decades, the most basic social rights have survived the many attacks by neoliberal reform movements.

Upon retirement, moreover, a large majority of European citizens benefit from both collectively guaranteed pension provision and – albeit less comprehensive – long-term care schemes that compensate for part of the hardship caused by the (biological) process of ageing and thereby contribute to ensuring a safe later life. In absolute terms, Western European societies have never spent a greater sum of resources to sustain the elder generation than in our times. Consequently, the bulk of healthy elderly people today remain independent from their families or other private sources of help. Many also receive public support when needing care. While the level of retirement provision often depends on previous earnings – and 'rewarded' labour performance – the prevailing policy approach to managing 'the risk' of ageing partially corresponds to the modern imaginary of a safe later life for all. As minimum pensions tend to

be granted irrespective of what beneficiaries have contributed to society in economic terms, values of human dignity have some bearing here. In general, moreover, market values are screened out when retired people are entitled to a basic benefit. Hence, concerning the devices established in this universe, social justice orientations, including those encapsulated in the idea of a ‘citizen’s wage’, continue to play an important role. This becomes visible when regulatory frameworks, via specific provisions (e.g., a retrospective upgrading of contribution records), organise some social redistribution for the benefit of citizens who have worked hard during their lives while going through periods of informal care work, involuntary unemployment, or low-pay. To be sure, in most European countries, the level of ‘institutionalised’ independence – that is, the contribution of organised welfare provision to well-being after retirement – is lower in the event of frailty. That said, the available elderly care package has become more comprehensive in many places since the 1990s, which has enhanced the likelihood of living in a situation of carefree or cared-for dependency during old age. Recent reform agendas geared towards ‘ageing in place’ and the increased rights of care home residents reflect widely shared commitments to the idea of personal self-direction in later life – although the scope for this often depends on individual circumstances including economic wealth (and this increasingly so in recent times, see below).

Overall, one can conclude that, regarding the reality of organised welfare provision in twenty-first century Western Europe, extant arrangements partially borrow from the vision of social modernity. No doubt, available ‘institutionalised’ support continues to be incomplete. More fundamentally, those devices, which took shape in twentieth century welfare states (particularly from the post-war period onwards) were never susceptible to eradicating social inequalities in terms of personal welfare during the working life and after retirement, nor were they able to eradicate the barriers impeding many children from accumulating an average amount of cultural and economic capital when growing up. However, in terms of expenditure, most welfare programmes have not decreased in scope throughout the new millennium. Recent statistical assessments of welfare state change in Europe and the Western world signal stability rather than decay concerning the collective investment in organised welfare provision (see Saraceno 2019; Kerstenetzky and Pereira Guedes 2021). Furthermore, notwithstanding the fact that the welfare state’s capacity for both preserving living standards for at-risk citizens and containing social inequality more generally has dwindled over the decades (see below), pro-welfare norms (human dignity, social justice, personal self-direction) undergird major regulatory frameworks and organisational settings throughout Western Europe. In other words: modernity has ‘invented’ robust devices that mirror the ‘normality’ of institutionalised collective support across the life course, however incomplete this support may appear. Related arrangements serve as a collective memory and are constantly shaping social expectations. They are containers of regulatory ideas and have reproductive capacities under the influence of self-reinforcing policy feedback effects (Pierson 2001; for a more nuanced analysis: Busemeyer et al. 2021). Such effects are also generated because people learn that public arrangements (can) structure their lives.

To some extent, commitments to such arrangements also become (re)vitalised by those welfare organisations that are entrusted with the orchestration or provision of benefits and services. Hence, the ‘makers’ of welfare equally contribute to keeping social modernity alive. They operate with an institutional mandate to deliver and to perform in ways that mean people can count on them. Insofar as environmental prescriptions push them to conform to

related expectations, and as long as the related agenda – at least partially – borrows from the vision of social modernity, this vision is likely to have an emancipatory impact. Furthermore, self-perpetuating collective agency within welfare organisations serves as a built-in stabiliser of the latter’s missions, including when the ‘makers’ of welfare fulfil these missions by deviating from institutional instructions in ways needed to make means meet ends. While this often implies a more conservative function of their organisation, this kind of collective agency tends to ‘normalise’ expectations towards designs and processes of organised welfare provision. On some occasions, idiosyncratic ‘makers’ of welfare certainly use their leeway to circumvent relevant prescriptions – including those we would associate with the vision of social modernity. However, during and after the formation of democratic capitalism, organisational agents from various welfare sectors have often contributed to developing extant programmes further or have invented new ones; they have also done this by doing advocacy work or liaising with civic groups, with this reflecting a potential for transformative action.

Independently from this, recent social change in European societies – as portrayed in Part II of this book – has solidified some of the norms associated with human progress in the above sense. Thus, the post-industrial configuration is prolific for public support to ‘innocent’ children and frail elderly people. At least, such programmes find tremendous support among the middle-class electorate (see below). Moreover, the growth of occupational groups and professions working in the educational and human service sector broadly speaking has bolstered the ‘natural lobby’ for related welfare sectors internationally (for many, see McAdams 2015). In addition, the human rights agenda, which has taken centre stage in the international polity of the twenty-first century, seems to create public pressures to combat poverty, including that found within affluent societies. A further indicator of this agenda becoming more influential has been the reaction to the Covid-19 pandemic, with massive political efforts to ensuring income replacement for those hit by the pandemic’s economic repercussions or ambitions to protect the most vulnerable by unprecedented forms of state intervention (lockdowns etc.). Concerning elderly people, classical social risks (health problems, loss of work capacity, early exit from gainful employment) have become ever pressing issues that affect electoral competition and have engendered social protest in various jurisdictions. All this contributes to consolidating the basic pillars of Western European welfare states.

More generally, in these welfare states, policies and practices borrowing from the vision of social modernity continue to be in demand. In twenty-first century Europe, mainstream welfare programmes – including those inspired by that vision – have remained very fashionable, even as social movements and political forces continue to make claims for amendments in this realm. True, it should be borne in mind that collective preferences concerning relevant institutions (such as employment protection and the role of markets) reflect both entrenched moral orientations and (assumed) self-interests (e.g., when it comes to the question of who deserves what). In principle, however, the ‘career’ of major regulatory frameworks throughout the areas under study in this book suggest that human dignity, social justice and (considerate) individual autonomy are widely shared values across contemporary Western Europe, notwithstanding that the adherence to these frameworks obviously is a question of degree and varies both within and between nation-states. A short digression into international surveys, opinion polls and electoral studies confirms this statement. To be sure, conventional approaches to capturing the magnitude of popular orientations – that is, usually highly structured quantitative studies based on a random population sample – have important limitations (see Chung

et al. 2018). For instance, they sidestep the ways in which attitudes are shaped by processes of organised opinion-making – for instance, media communication which portrays (and stigmatises) typical target groups or alleged problems with extant welfare programmes including benefit abuse. Policy agendas under public debate appear influential as well. Empirically, one can observe that the political discourse, as well as acts of policy-making, often precede developments in public opinion building (Deeming and Johnston 2019: 167) – from which it can be inferred that survey participants tend to echo messages conveyed by the media or mainstream politicians. For these reasons, this book did not engage with quantitative assessments of public support for distinctive social policies up to this point. That said, the related body of research nonetheless corroborates the above argument of public institutions reflecting popular values at least to some extent. Thus, according to available evidence, the opinion that governments should redistribute primary (‘private’) income has remained widespread during the first two decades of the twenty-first century (Abou-Chadi and Hix 2021). Using international survey data, Roosma (2021) demonstrates that, in the years following the financial market crisis, the neoliberal conjecture – according to which organised welfare provision cost businesses too much in terms of taxes and charges – has found less support than at the turn of the millennium. Even in areas in which economic issues and income provision are tightly interwoven, important segments of the European population are sympathetic to social rights regardless of the beneficiaries’ (past) contribution to national wealth. While this kind of universalism seems less pronounced when it comes to supporting jobseekers, Europeans share a general preference for treating all citizens in equal ways and providing them with some form of social security (Reeskens and van Oorschot 2021). It remains true that, concerning people out of work, part of the European population welcomes ‘demanding active labour market policies’ and workfare programmes to ‘put pressure on the unemployed’ (Fossati 2018). That said, workfare policies gain most of their support from high-income individuals and those attached to right-wing values whereas, in the ranks of lower-skilled people on a modest income and individuals leaning towards traditional (left-wing) social values, these policies have often been rejected (Garritzmann et al. 2018). Even in countries with a liberal welfare regime, studies have found growing scepticism regarding the workfare doctrine although the latter is deep-seated in this particular regime (Deeming and Johnston 2019). As for guaranteed retirement provision, more wealthy Europeans, in particular, consider it fair that those with higher earnings during their careers should receive better pensions than poorer sections of the population (Reeskens and van Oorschot 2021). However, adherence to decent retirement provision has generally remained high within Western Europe (Bremer and Bürgisser 2023: 45). All in all, the available evidence suggests that public attitudes to the welfare state, while corresponding to the socioeconomic and cultural characteristics of respondents, have not necessarily become more polarised in the recent past (Buss 2019a; Cooper and Burchardt 2022).

It holds true that electoral competition in twenty-first century Western Europe seems to revolve around new ‘partisan politics’ (Abou-Chadi and Immergt 2019). Thus, left-leaning middle-class milieus place an emphasis on investments in human service provision while apparently being less sensitive to more traditional social policy agendas with their focus on income replacement programmes. Concerning the latter, far-right movements have recently stepped in, albeit with a pledge to withhold or withdraw entitlements from non-native populations. In this context, debates about whether beneficiaries of welfare programmes are seen to ‘deserve’ entitlements have gained momentum during the last decades. By tradition, ‘deserv-

ingness' proves to be a 'big issue' and to influence people's voting behaviour internationally (van Oorschot et al. 2017; Attewell 2021), often going beyond traditional divisions between 'left' and 'right'. In recent times, the voting choice during general elections was particularly driven by the question of social rights for 'outsider groups' (immigrants, long-term jobseekers, people 'on welfare'). Citizens sympathetic to the far-right have been found to display (moderate) support for what they view as being 'deserving' benefit recipients (for instance the native elderly) while rejecting unconditional support to the previously mentioned outsider groups (Busemeyer et al. 2022; Buss 2019b). For this part of the electorate, foreign ethnicity makes a huge difference, even when it would otherwise defend more egalitarian values (Kros and Coenders 2019). Hence, in the new millennium, the popularity of entrenched forms of organised social support is frequently moderated by what has been couched in terms of 'welfare chauvinism' (the implications of this will be discussed at greater length below). Having said all this, the majority of contemporary Western Europeans subscribe to the idea that the welfare state should cover social risks endemic to the capitalist economy once beneficiaries live a 'normal' life course – that is, go to school and take education, engage with gainful employment, and withdraw from the labour market at the age of retirement. Related expectations are quite robust. Where populist movements on the far-right have grown particularly strong, it is interesting to observe that, over the last years, some important conservative parties in Europe have hesitated to pursue retrenchment strategies tackling the 'native' population. More generally, it seems that if voters (would) screen out social prejudices and perceptions concerning alleged outsiders, most of them (would) agree that welfare states should protect citizens against a harsh loss of income during working life and after retirement. They also welcome public measures to foster young people and protect children. An important mitigating factor here is confidence in social protection institutions, as people tend to distrust these institutions when being at risk of social deprivation or worried because of retrenchment policies (Ebbinghaus and Naumann 2018; Taylor-Gooby et al. 2019b; Bode and Lüth 2021). Apart from this, social divisions which are often purported to split public opinion, such as the much-debated generational conflict around pension provision, have been found to matter only modestly, regardless of the dynamics of demographic change (Hess et al. 2017). Putting aside market-friendly welfare regimes such as in the UK and Ireland, the conviction that the private economy excels in fostering human well-being without further regulation has not become a dominant reference point among Europeans during the last decades (Taylor-Gooby et al. 2019a).

With the above qualifications, then, Western Europe continues to be the fulcrum for modern thinking concerning the idea of public responsibility for welfare arrangements outside of the market economy – and this pertains to both income replacement and human service provision. A side note here would be that concepts and approaches developed in this universe have extended to both EU latecomers and other countries around the globe – even as the technologies used for regulating economic systems in Europe have had ramifications even in regions with little attachment to the Western model of democratic capitalism, such as East Asia (see e.g., Bode 2014a; Hwang 2022). Granted, functionalist interpretations of welfare state expansion submit that – whether in parliamentary democracies or elsewhere – economic dynamics 'automatically' spur on public welfare programmes since both 'socialised' protection schemes and a partial de-commodification of the labour force are needed to make capitalism flourish. In the sense-making of many European citizens, however, these programmes are often represented as social rights and cushions against the laws of the capitalist economy. Likewise,



these rights are defended by those organisations that are entrusted with managing benefits and services, as illustrated earlier in this book. While this lies in the self-interest of the organisations' workforce, it also resonates with the latter's worldviews and professional ethos. The fact remains that institutionalised arrangements whose purpose is to protect citizens and increase their well-being (compared with situations in which these arrangements are lacking) have become part of the 'cultural repertoire' of Western European societies.

At the same time, much seems feasible when it comes to shaping organised welfare provision in the spirit of social modernity. This spirit has never surfaced in pure form, yet Western European societies have invented devices that are infused by it and have become taken for granted – for instance, progressive tax schemes, social insurance bodies, human service professions or welfare bureaucracies capable of devising and implementing public programmes. Distinctive regulatory frameworks have been acknowledged as major levers for establishing socially balanced agreements in complex societies, in part because they manage to translate normative principles anchored in emancipatory values and embody a technical potential for fostering human progress – irrespective of the fact that the above frameworks and settings serve other purposes as well. This can be sensed in various areas, including those that this book has scrutinised in greater depth, namely, efforts to ensure child empowerment, instruments to make work (more) decent, and provisions for making old age safe(r). As many devices developed at earlier stages of democratic capitalism have – at least partially – withstood adverse winds of change, they remain 'tools on offer' throughout most European jurisdictions.

This also holds for the 'makers' of welfare, that is, agents involved in the delivery of benefits and services. As argued above, the routine operations of welfare organisations are a vital resource of these jurisdictions. Many of these organisations show a capacity to defend or develop further the aforementioned principles even in a (post-industrial) context of increased complexity and diversity. Sometimes, adapting to this context, their members proactively seek to promote human progress through transformative agency. Yet even when performing a more conservative role, they help these principles 'stay in the game'. True, being a 'guardian of the welfare state' (Koch 2021) in the early twenty-first century may imply accepting restrictive conditions and using extant discretion to pursue emancipatory goals in more informal and provisional ways. While agents must frequently engage in 'balancing acts allocating limited resources against ever growing demands for subsistence and advice' (ibid: 256), 'dissenting creativity' (Garrett 2021: 32) is a real option in many places. The evidence collated throughout suggests that even more classical public bureaucracies are left with some leeway in their day-to-day operations, with options to make creative use of 'administrative statecraft' (Du Gay and Pedersen 2020) – despite clear lines of command and a pre-defined distribution of personal duties. It seems that, in the post-industrial configuration, cultural change helps to make discretionary capabilities more critical since public organisations are increasingly led to 'adhere to less bureaucratic and more relational values such as respect, tolerance and honesty' (Sirris 2020: 73, referring to Wæraas). As illustrated in Part IV of this book, the vitality of civil society organisations across Europe (and worldwide) acts as a tailwind here. What has been termed a 'global associational revolution' (Salamon 1994) some while ago has fuelled the formal involvement of non-profits in ever more societal sectors – including organised welfare provision (Klein and Lee 2019). While this has sometimes come at the price of them being decoupled from their original calling (for many, see Bromley and Meyer 2017), these organ-

isations can still make a difference when it comes to defending or developing emancipatory values inspired by the heritage of the Enlightenment.

This respective capacity of contemporary welfare sectors does not come as a surprise, as discussed in the first part of this book. Social-constructivist approaches suggest that modern organisations, when they become involved in an ‘ongoing and continuous effort to order, segment, [and] analyze’, always tend to seek their own solutions to problems posed by ‘the chaotic material of experience’ (Lorino 2018: 276). In this vein, entrenched habits may become ‘transformed, adapted, abandoned, or reinvented – with a ‘window open to the vast world’ of undecided subject matters. This process may also entail the ‘emergence of self-organisation’ based on the creative use of experience and experimentation (ibid: 257; 32). Thus, the experience of paradoxes may undergird ‘virtuous organisational cultures of abundance and generate organisational learning’ (Berti et al. 2021: 6). Importantly, collegial action (among peers or with supervisors) is fundamental to many welfare organisations and ‘produces coordination and cooperation in complex and uncertain decision making’ (Lazega 2020: 14), with deliberative processes feeding into ‘collective responsibility enforced with personalized relationships’ (ibid: 2). The combination of bureaucracy and collegiality, including in the encounter with external stakeholders such as inspection agencies or commissioning bodies, creates space for ‘heterogeneous members trying to self-govern by reaching agreements’ in relevant work settings (ibid: 11) – which may help cultivate entrenched missions even under difficult circumstances (e.g., budget cuts). Related practices have also been discussed under the umbrella term of organisational resilience, that is, concerning options for ‘positive adaptation under crisis or stress, and bouncing back to a new stable state’ (Powley et al. 2020: 2). All this appears crucial when it comes to gauging the potential of welfare organisations to make social modernity ‘feasible’ against all odds.

## 17. Social modernity in trouble: arrangements dismantled, disorganised, and dissociated

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Concerning the development of welfare arrangements in Western Europe between the 1980s and the early 2020s, we should examine the two faces of the coin. The analysis in this book has clearly shown that institutions and organisations susceptible to moderate socially balanced agreements about how to collectively govern human affairs broadly speaking have undergone complex transformations during that period. While these institutions and organisations were always ill at ease with some key dynamics of capitalistic economies, it seems that, in various respects, they nowadays achieve less than in earlier periods of the modern welfare state – notwithstanding a built-in potential for ensuring human progress. From this perspective, social modernity is in trouble. At least, the related policy agenda has become more selective and bifurcated. Indeed, the evidence re-examined for this book reveals that the post-industrial configuration exhibits various setbacks and inconsistencies, with this suggesting a partial loss in influence of those values (human dignity, social justice, considerate individual autonomy) that the theoretical reflection in Part I conceptualised as ideational cornerstones of this very agenda.

This chapter will recapitulate the respective findings and elaborate on driving forces behind recent welfare state change. First, it will characterise past institutional change as a dismantlement of pre-established regulatory arrangements, showing that, across Western Europe, devices developed at earlier stages of democratic capitalism have been curtailed or cut to pieces during the last decades. This has combined with certain dynamics of social change to constrict organised welfare provision for important parts of the European population. Second, it will be argued that developments within the infrastructure of the welfare state reflect patterns of permanent disorganisation therein. Many ‘makers’ of welfare, while maintaining some discretion for wilful collective agency, are exposed to modes of governance that render the compliance with incumbent missions more volatile and the search for pragmatic solutions more complicated – especially in cases where such agency is committed to the principles of social modernity. Loosely coupled with institutional change, collective praxis within post-industrial (welfare) organisations proves to be a factor on its own in this overall process. A third overarching message from the preceding sections is that, interrelated with the two trends mentioned previously, dynamics of dissociation split important welfare arrangements from relevant contexts, meaning that the principles of social modernity are applied in inconsistent ways and human progress becomes more selective.

## 17.1 DISMANTLEMENT AND SHIFTS IN POLITICAL INFLUENCE

In the wider welfare state scholarship, the term ‘dismantlement’ mostly denotes actions that lead to dwindling entitlements to social benefits or human services for larger – but not all – sections of a given population. This concerns levels of payment, conditions of access, or duration of support and may connect with a decrease in the respective societal effort in relation to a nation’s general wealth (usually measured as GDP). In some European jurisdictions, the above effort has declined over the last decades when taking a broader range of indicators into account, such as a poor indexing of welfare transfers or benefit caps affecting citizens who claim support from several welfare programmes including housing (Farnsworth 2021b). However, dismantlement can also occur when some areas of organised welfare provision see additional public investment, along with a revamped architecture of organised welfare provision. Moreover, reforms may impact differently upon welfare state stakeholders and hit some citizens harder than others. A useful distinction here is the one introduced by US political scientist Paul Pierson (1994; 2001) who once made the concept of dismantlement popular among social policy analysts. He distinguished between adjustments involving changes in benefit generosity, on the one hand, and (various types of) institutional transformation through which previous programmes are reorganised, on the other hand. The second pattern may be associated with long-term dynamics of welfare retrenchment, yet programme structures can also ‘change while spending levels remain similar’ in total (Jensen et al. 2019: 684). Accordingly, movements of dismantlement restructure devices for organised welfare provision in a selective manner and tend to affect people in unequal ways. A major mechanism at play here is strategic policy-making, which retrenchment advocates use to tackle those programmes where obstacles appear smallest (for an overview of the respective debate, see Jensen et al. 2019). Furthermore, dismantlement is often associated with movements of marketisation. It then stands for policies that expose citizens to increased market pressures, in the sense of social protection schemes providing less security for those obliged to sell their human capital (Dukelow 2021). Through this lens, dismantlement connotes a movement away from the ‘bestowal of social rights on the basis of social citizenship rather than labour market performance’ (ibid: 127). Dismantlement is also seen at work in the restructuring of non-state welfare arrangements such as (defined benefit) occupational pension schemes (McCarthy 2017, for the case of the US), with a more individualised and volatile social protection as a result. The concept has equally been applied to non-statutory forms of regulation in the field of industrial relations (Hermann 2013). In this context, it describes a shift in the ‘locus of collective bargaining from the national, regional and sector level to the company level, ... increasing the fragmentation of employment conditions’ (ibid: 15).

Movements of social change in the wider society can be viewed to have facilitated all these developments, with shifts in political influence being a powerful vector of transformation. Stråth and Wagner (2017: 174), elaborating on the ‘dismantling of organized modernity’ from the 1960s onwards, posit that the above institutional change in Western welfare states was ‘brought about by elites who saw their power endangered’. In the course of time, economic leaders have increased their social authority and achieved an enhanced bargaining power relative to labour and lower-class citizens, as well as when it comes to social policy-making (Paster 2015). In the same vein, occupational and educational groups higher up the social

ladder have become more dominant within political institutions (Elsässer et al. 2021). The transformation of civil society as portrayed in Chapter 6 has been an important factor here. Over the last decades, both the weakening of the labour movement and the (upper) middle-class bias of political associations have reinforced the influence of social forces sympathetic or indifferent to retrenchment reforms, even as the potential for resistance against cut-backs targeting lower-class stakeholders of welfare programmes has shrunk. Internationally, those citizens who depend most on welfare state programmes are often absent from the more influential spheres of civil society. The increasing reluctance among workers to join unions has contributed to this situation – which can be identified as one driving force behind the expansion of the ‘post-industrial underclass’. Among other things, the curtailment of critical welfare programmes has increased the size and relative disadvantage of this group – even though processes of dismantlement do not necessarily reflect a clear-cut ‘dualisation’ of social policies, given that welfare reforms which hit this group may also affect the life prospects for better-off workers, for instance concerning their level of self-direction in post-industrial labour markets or their access to secure retirement provision.

Processes of dismantlement often imply that welfare state programmes are cut to pieces, with greater heterogeneity within the realm of social protection as an inevitable outcome. Putting aside gradual differences between welfare regimes, this general movement has materialised in a number of overarching patterns in recent times. First of all, it has surfaced within the sphere of gainful employment. This is a major arena for agreements by which individuals and social groups seek to strike a balance between diverging interests and values in the process of governing complex societies. Accordingly, changes in this very sphere have strong repercussions on life prospects and the distribution of life course opportunities – and many argue that Western Europe has seen a dismantlement of its ‘social model’ (Vaughan-Whitehead 2014) due to reforms impacting on this very sphere. That said, in most jurisdictions, benefit cuts have rarely addressed short-term jobseekers in a direct manner and programme change in the above sense has remained an exception for this group of welfare state stakeholders. At the same time, novel active inclusion schemes, combined with higher benefit conditionality, have targeted lower-class citizens in the first instance. Increased heterogeneity has also been produced by shifting groups of beneficiaries from one income replacement scheme (e.g., social insurance, occupational welfare) to a different one, most prominently means-tested income support and welfare-to-work programmes. With changing labour markets and more restrictive welfare conditionality, the access to institutionalised social protection has proved to be particularly limited for at-risk groups such as the (incrementally) growing population of independent workers with a small business, low-skilled workers at the beginning of their career or with impairments, and lone parents working part-time or only a few hours per week. For these groups above all, market dependence has significantly increased over the last decades. Insecure earnings combine with poor income replacement rates to create a permanent pressure to accept difficult working conditions. Moreover, public effort in work-related areas of social protection has generally not kept pace with a quickly evolving demand. Concerning healthcare, for instance, less public input per case (compared with previous periods) may oblige patients to mobilise additional private resources to have their needs met or to skip waiting lists (which are long in some European countries). A related phenomenon has been the growth of out-of-pocket expenditure, with some extreme cases such as Greece. As private income is unequally distributed among the wider population, less affluent people may eventually be disadvantaged when

accessing services. Compared with evolving needs, welfare state support for people in poor health – which in itself is an outcome of social deprivation in many cases – appears particularly deficient. Consequently, an individual's position in the wider (market) economy has stronger repercussions than in previous times – and as social protection schemes are crafted by governmental actors, shifts in political influence play an eminent role here.

In addition, labour market policies have been unable to make European economies reach the goal of full employment or to stop the marked surge of precarious work situations since the 1980s. Quite the reverse, many reforms have de facto endorsed unstable work careers for parts of the population by promoting disruption in the access to, and maintenance of, gainful employment. The movement towards dismantlement has exposed many people to considerable challenges in their efforts to find, choose and preserve a decent job. When seen in the light of social modernity values, this has had important ramifications. Given the rapid spread of poor-quality jobs in post-industrial economies and reduced labour rights in various industries, the above movement has diluted entrenched norms of social justice for relevant sections of the working population as for these sections, previous achievements are less honoured in institutional terms. Moreover, active inclusion schemes, though going viral over the last decades, have seldom improved the living conditions of their clientele, especially when coming with enforced activities that lower the well-being of these groups (see Carter and Whitworth 2017, for the case of the UK). The authoritarian spirit instilled into many welfare-to-work schemes mitigates commitments to respecting individual autonomy in ways unknown during the 'golden age' of the modern welfare state. It remains to be seen whether recent amendments in labour law (e.g., in Germany) will endure and reverse this tendency.

Secondly, movements of dismantlement also become discernible when considering the living conditions after retirement and the modern promise of a safe later life. Here as well, shifts in political power are obvious. Thus, business interests in the financial services industry have been an important vector for the restructuring of social security institutions internationally, as retirement became a buoyant market for 'new private sector providers' (Pieper 2018) and employers sought to get rid of expensive defined-benefit schemes. The international result was 'pension insecurity' (Olivera and Ponomarenko 2017), as pointed out in Chapter 9. On the whole, two decades into the twenty-first century, retirement income is less reliable and sometimes also less generous for a good deal of current and future pensioners across Europe. While this belies the popular narrative of the older generation (ab)using their political influence in order to defend past achievements and inflate old age-related welfare programmes, dismantling policies have entailed new social divisions. On the one hand, many 'baby boomers' retiring between 1980 and the 2020s have benefited from relatively generous conditions, in particular those on early job release schemes (cushioned by social security funds) or receiving payments from a defined-benefit occupational plan, after working in a unionised big company offering a generous welfare package. The same holds for those 'lucky' to have purchased saving plans yielding high profits in the financial market. On the other hand, many investors in pension plans have lost money after contracting with a less well performing saving vehicle. Furthermore, as public pension schemes have become less generous and more contribution-based, previous employment conditions impact more strongly on retirement income than in previous times. To some extent, 'poverty in old age' (Ebbinghaus et al. 2020), affecting a growing number of Europeans (notwithstanding international differences), is a direct outcome of policy change and reflects the dynamics of dismantlement insofar as waged employment as such is no longer

a springboard to decent retirement income internationally. For important cohorts of current and future pensioners, there is a tighter correspondence between ‘market dynamics’ and individual welfare after retirement. In many cases, life-long human effort alone does not suffice to avoid poverty in later life – which runs counter to entrenched norms of social justice – even as the normative commitment to ensuring human dignity in later life has often become confined to (mostly modest) minimum benefit schemes in order to prevent the worst scenario. All these developments combine to diminish the influence of emancipatory principles on welfare arrangements aimed at addressing the conditions of old age.

Concerning efforts to support frail elderly people, dismantlement is discernible as well – despite an expanding infrastructure of ‘old age care’ (Spasova and Vanherke 2021). Thus, the demand for services has often grown faster than available capacities. In many places, the coincidence of policy lags and demographic dynamics puts strain on care recipients. Against the background of an overall reduced availability of family help, numerous elderly citizens in Europe have become obliged to spend a greater proportion of their citizen’s wage or ‘deferred’ labour market income on day-to-day support services. In addition, some European countries have seen a creeping ‘re-mix’ of responsibilities (Leibetseder et al. 2017), with a greater onus put on families and users. Although care recipients have often become entitled to select the service they prefer, many are overburdened by taking informed decisions within the ever more complex infrastructure of long-term care services. In the jungle of ‘choice, competition and care’ (Rodrigues and Glendinning 2015), a notable proportion of users (and their relatives) lack control over volatile and opaque service markets, notwithstanding efforts to counter-balance this imbroglio by quality assurance programmes and advice-giving bodies. Choice options – where they exist at all – tend to serve the interests of (upper) middle class citizens, given the cultural and economic capital they can mobilise to find appropriate care. Again, institutional change seems to be influenced by the power shifts discussed above. Well-educated social milieus and their strongholds in civil society have not opposed the turn to the market, even as commercial investors from the private sector have seen their businesses flourish, with population ageing and welfare state subsidies providing splendid opportunities for making money in the respective industry. In addition, many care-dependent people in Europe make use of the ‘care drain’ within and beyond Europe – which ignites a transnational exploitation of the care workforce from less affluent countries. Implications are real but complex. Income differentials related to socioeconomic inequality continue to have a bearing, even as options to receive or provide adequate support in the event of care-dependency remain contingent on income positions care recipients have achieved (in the social status order) during their working lives. However, inequalities are not clear-cut since additional personal circumstances come into play, such as having family nearby or being embedded in private networks. In the post-industrial configuration, citizens who are better off in economic terms can nonetheless suffer from a lack of adequate care. While international differences remain palpable – given the north–south divide in the access to publicly (co-)funded care services – the above trends have occurred in various countries and entailed infringements to the norm of human dignity, as well as (extra) constraints concerning opportunities for personal self-direction in later life.

Concerning activities for child empowerment, the movements through which established regulatory frameworks have become dismantled are more difficult to discern when recapitulating developments during the last decades. Internationally, influential political forces – including the corporate sector – have welcomed initiatives to boost collective efforts in this universe.

Family allowances have been viewed as endorsing the building of human capital, along with the expansion of childcare services in the interest of both economic elites and recent generations of middle-class women. In tune with both the mantra of social investment and the United Nations Convention on the Rights of the Child (enacted in 1989), public policies have sought to make the respective social support systems more cohesive internationally. That said, European child and family welfare systems have undergone structural change in ways that have provoked mixed results. Thus, these systems have often not managed to compensate for the increase of child poverty, which can be viewed to run against the value of human dignity. Where family policies have invested in facilities with a potential to promote children, moreover, the capacity of these systems has often not kept pace with the rapidly increasing demand – for instance when it comes to providing high quality childcare for all youngsters. Frequently, economic and social capital is required to fill extant gaps on an individual basis. There is implicit dismantlement insofar as this implies a growing importance of private assets when families seek support concerning childcare and early education. In the new millennium, social positions achieved in the market economy and the related status order matter greatly concerning the material conditions of child rearing – although the respective dynamics are moderated by disruptive processes in post-traditional family life of which the material consequences often cut across social milieus (see again Chapter 5). That said, shifts in political power have contributed to the aforementioned social bias insofar as the economic elites and many middle-class taxpayers have refrained from accepting enhanced ‘socialised’ outlays for welfare programmes more generally.

The same holds for political efforts to make child protection more effective. Again, related commitments clash with a widespread reluctance to radically extend programmes that would have a potential to assist and empower at-risk families. Internationally, there is a widespread unwillingness to conceive of child maltreatment as ‘a *social* problem which causes *social* harm’ (Parton 2020: 22, emphasis in original). Rather, it is considered more like a moral failure of parents. In addition, established devices have been cut to pieces in this (sub)field of organised welfare provision as well. While, in the new millennium, efforts have become more intensive when it comes to monitoring the situation of underprivileged children, contemporary family welfare services (must) often prioritise certain groups of users at the expense of more comprehensive and preventive activities. To some extent, this is driven by the spread of ‘risk-oriented’ approaches to combating child neglect and maltreatment – most prominently in Anglo-Saxon welfare states but elsewhere as well. Ambitions to prevent overt harm to children ‘whatever it takes’ can easily have repressive effects on disadvantaged mothers and fathers. At the very least, related social interventions often fail to improve the fate of ‘troubled’ families and lead to negative repercussions on the ability of parents to foster children’s development. Overall, it appears that rights to individual autonomy are not always respected when child welfare services interact with parents. While political responses to problematic forms of family life have remained flawed, social change contributes to making child protection a more pressing issue. In important respects – for instance work-life balance, income security, stability of unions – the living conditions of many parents in twenty-first century Western Europe are less comfortable when compared with those of earlier generations (in the second half of the last century).



## 17.2 DISORGANISATION AND ‘MANAGERIALIST’ PUBLIC GOVERNANCE

Concerning those entities through which welfare arrangements are put in place, the analysis in Part IV of this book has pointed to a widespread phenomenon, which can be encapsulated by the term *disorganisation*. Though not being a prominent sociological concept, this notion lends itself to characterising dynamics of change at different levels of advanced Western societies. It appears particularly helpful when regarding the public governance of organised welfare provision, as will be demonstrated below. The idea of entire societal sectors becoming ‘disorganised’ is inferred from accounts of the political economy literature that address the interplay of the economic system and the socio-political organisation of social life broadly speaking. The respective scholarship has shown that, internationally, change in this interplay from the late 1970s onwards has produced ‘increasingly unstable, fragile and disorganized societies’, with one fallout being a reduced ‘governmental impact upon the structure and the performance’ of these societies (Streeck and Mertens 2013: 55–6). This connects with a new ‘pecking order’ in the economic system in which strong international corporations and the financial sector set the tune. A shrinking power or fragmentation of traditional member organisations (trade unions, professional and business associations) is a concurring trend according to this scholarship. Typical symptoms of disorganisation in this realm include a thinning out of industrial relations and, more generally, the erosion of coalitions that once had a remit to ‘coherently organise the socio-political systems of ... state capitalism’ (Offe 1985: 6). With a pluralisation of class structures and changing cultural representations taking place among the wider citizenry, so the argument goes, the ‘disorganisation of civil society’ is an essential ‘precondition of disorganisation in the state’ (Lash and Urry 1987: 7).

With some exceptions (see Shibata 2020: 21ff, dealing with Japan), this ‘holistic’ approach to understanding the epoch-making transformation of democratic capitalism tends to be sidelined by the more recent political economy literature. New concepts – such as network-based capitalism, digital capitalism, or creative capitalism – have gone viral instead. However, as spelled out in earlier work by this book’s author (Bode 2003b; 2006; 2010; 2017), the above approach helps uncover those mechanisms through which major welfare arrangements have become remodelled with the transition to the post-industrial configuration. The concept reveals how, during the last decades, shifting bonds between societal sectors – as well as change in the character of political interest intermediation – have combined with altered social policy frameworks to undergird a new architecture of organised welfare provision. It is noteworthy that, with the establishment of this architecture, there seems to no longer be a fundamental difference between non-liberal welfare regimes in mainland Europe and what Pierson once labelled the “‘disorganised” model of capitalism’ in the Anglo-Saxon world (Pierson 2001: 432). Rather, during the last quarter of the twentieth century and the first decades of the new millennium, all European societies have – even if to different degrees – undergone a multi-faceted restructuring of the above architecture under the influence of various movements of disorganisation (Greer 2013).

It holds true that, more recently, there has been debate about a comeback of *organised* capitalism in some parts of the world, that is, architectural characteristics reminiscent of conditions prominent between the 1920s and 1970s (Stråth and Wagner 2017: 167). Besides the political administration of China and of other state-driven capitalist economies in emerging markets,

influential political forces in Europe have come to endorse enhanced government control over the national economy, seeking options for (re-)building public infrastructure around a renewed industry base (Nölke 2017; van Apeldoorn and de Graaff 2022). All this seems to indicate an international counter-movement to the spread of a disorganised (and cosmopolitan) model of liberal capitalism, based on the conviction that twenty-first century governments should ‘organise’ the economy in more direct ways and also restrict the free global flow of human capital in some way. However, regarding the public governance of welfare arrangements, a sea change back to a more ‘organised’ approach is difficult to discern. The wide-reaching restructuring of the welfare state undertaken between the 1980s and 2010s in most parts of the Western world, aligning well with the shift to a more disorganised capitalistic economy, has had permanent consequences within the organisational settlement of European welfare states.

The notion of disorganisation also surfaces in some strands of organisational sociology, most prominently in contributions inspired by approaches rooted in the epistemology of social-constructivism (see the brief review in Part I of this book). Thus, Berti et al. (2021: 2), in their analysis of the paradoxical character of contemporary organisations in the Western world, comment that the latter are seldom ‘orderly, logical and predictable entities’ but grapple with permanent processes of disorganisation, under the influence of ‘competing goals, contradictory interpretations, and ambiguous causalities’. The authors echo Cooper (1986), who argued a while ago that these processes are quasi-natural in contexts in which various internal stakeholders recurrently seek to strike new balances and can only be domesticated by the use of hierarchical power. In a similar vein, (pragmatist) process theory suggests that collective action within organisations is repeatedly subject to ‘disruptive situations’ that ‘require disruptive responses which generate the non-linear temporality of events, threats, and opportunities’, with all these dynamics never being ‘completely under control’ (Lorino 2018: 278). Likewise, Herath et al. (2016) argue that organised collective action always requires some ‘non-organised’ spaces to enable flexible problem-solving – which implies that some degree of disorganisation is always needed to make organisations work. Thus, breaking with entrenched routine and dealing creatively with multiple challenges is an integral part of collective action in modern society and can be viewed as the ‘bright side’ of organisational inconsistencies (Berti et al. 2021: 44). This resonates with what Subchapter 1.3 has conceptualised as conservative praxis within contemporary welfare organisations. Under certain circumstances, drastic movements of disorganisation may even spark innovation and open some space for ‘transformative agency’ therein (Bode 2006b).

That said, classical approaches to modern organisations hint at the latter’s fundamental comparative advantage concerning their ability to make things happen on a regular basis – which is a performance difficult to achieve by other kinds of social action (Thompson (2017 [1967])). This very capacity is what modern thought considers as being cherished by an ‘enlightened’ citizenry – given the latter’s interest in a life with few(er) worries concerning material prosperity, health shelter and so on. As a result, from early industrialism until the late twentieth century, mainstream organisations in the Western world were shaped by repetitive routines and acts of formalisation to make collective action goal-directed. Within their confines, other human desires, such as spontaneous forms of socialising at work, were restrained in systematic ways. Modern society came to expect organisations to carry out specific missions, along with a deeply entrenched division of labour between different societal sectors and goal-specific organisations therein (Perrow 1991). Concerning organised welfare provision, the evidence

collected throughout this book suggests that, in the recent past, this overall configuration has not changed after the restructuring of relevant public regulation. While this regulation provokes procedural fragmentation in various instances, it is unlikely that collective action in typical welfare sectors is continuously chaotic, given the persistence of highly institutionalised environments and enforceable legal obligations. Processual flexibility and even subversive agency are often a ‘must’ in contemporary welfare organisations, yet pressures to rearrange activities come with expectations to institute a new ‘organised balance’ and to (re)establish capacities for delivering on an agreed purpose. Hence, accepting the tenet that all modern organisations live in a continuous state of disorganisation would be misleading.

Rather, when exploring dynamics of disorganisation, the devil lies in the detail, that is, the ways in which the mandate of organisations and sectors are ‘regulated’ or ‘managed’. Related mechanisms have repercussions on collective agency in work settings that are entrusted with the administration of welfare benefits or the provision of human services. It should be noted at this point that the phenomenon of disorganisation is not new to Western welfare states and has been discussed in earlier debates about the latter’s organisational foundations. This, for instance, pertains to large bureaucracies found to fail in treating ‘cases’ uniformly, due to red tape, mismanagement and informal arbitrariness (Brodin and Majmundar 2010). The evidence reviewed in this book, however, suggests that, since the 1980s, related distortions occur in a more systematic manner and materialise in erratic processes of service delivery, unsteady contractual relations, high staff turnover and operations through which users are shifted back and forth within and across welfare sectors.

Most obviously, disorganisation has made its way into those entities that orchestrate or deliver human services (Bode 2006b; 2017). Policy inputs are complex in this universe. As public bureaucracies, service providers and other stakeholders are involved here – for instance via networks and political negotiation – the wider scholarship has come to label the underlying arrangements as governance, arguing that they differ from mere governmental action. While, concerning these arrangements, various paradigms are currently ‘competing and co-existing’ (Torfing et al. 2020), the analysis in Chapters 12 to 14 has brought to the fore that the ‘legacies of New Public Management in Europe’ (Bezes 2018) have shaped efforts to change these arrangements by reducing the very scope of direct public intervention and making operations more business-like, even as – from the 1980s and onwards to the early 2020s – the achievement ‘of more with less’ has remained a strong storyline in the underlying discourse. NPM reflects a distinctive orientation towards navigating collective agency under public oversight, namely a culture of managerialism (Klikauer 2013). When applied to the governance of welfare states and welfare organisations, this notion stands for a combination of steering tools adopted from private businesses – for instance, product-based planning, customer orientation, differential remuneration – and faith put into (direct or indirect forms of) top-down oversight, such as focused controlling, sophisticated accounting systems or numeric performance evaluation. Moreover, such managerialism aligns with the doctrine of lean administration and the marketisation of intra-organisational relations within public service settings.

Connecting this characterisation with the theory review in the first part of this book, one can discern that the spread of managerialism is grounded in a more deep-seated movement of societal modernisation throughout the Western world. With this movement, the technologies by which societies seek to pursue agreed collective goals have been imbued with a special logic of rationalisation (Weber 1978 [1922]), geared towards modelling means-ends-relations

on the ‘principles of rationalized science’ (Bromley and Meyer 2017: 950). This pertains to public bureaucracies and capitalistic businesses alike. During the twentieth century, the former became a stronghold for goal-directed and planned administrative action, whereas the latter, driven by the search for surplus-income and greater cost-efficiency, invented sophisticated accounting schemes to monitor collective agency at the organisation level. On a global scale, this entailed movements of quantification and pervasive calculation throughout various societal sectors (Mennicken and Espeland 2019). The trend towards enhanced numeric control has become ever more fine-tuned over recent decades, given the proliferation of steering tools, such as ‘management by objectives’ and ‘pay for performance’, along with the spread of intra-organisational contracts and internal markets (Nies and Sauer 2018).

While novel forms of (bureaucratic) rationalisation may sometimes help to achieve emancipatory goals associated with modern thinking, the evidence collated in this book suggests that the rise of managerialism has brought considerable challenges to contemporary landscapes of organised welfare provision, given that managerialist public governance provokes movements of disorganisation in several ways. First of all, along with new governance models, the above landscapes have become fluid in recent times. True, in the twenty-first century version of the ‘society of organisations’ (Perrow 1991), the accustomed division of labour between societal sectors persists. Most prominently, this pertains to the split between the sphere of the ‘productive’ corporate sector, on the one hand, and organisations with a remit to develop or maintain human capital outside this sphere, on the other. However, many European governments have devolved delivery roles to formally independent providers, even as welfare reforms have altered the ‘terms of trade’ in those countries in which non-state service provision is a more traditional pattern (see below). In addition, private sector firms have invaded various welfare sectors, entering domains from which they had been widely absent in the last century (e.g., childcare, in-patient care, care for the elderly). This has fuelled the influx of ‘business thinking’ into areas sheltered from the latter during earlier times (Bromley and Meyer 2017; Mosley 2020, referring to the US). In this context, novel steering models have encouraged leaders and their subordinates to become entrepreneurial, question routines, work in temporary projects, and to accept risks when making decisions with economic implications (Reed 2019).

Secondly, the related governance approach has refashioned the previously established division of labour within the infrastructure for organised welfare provision, with this altering the roles of the involved parties (public authorities, inspection agencies, non-state service providers, etc.). In the new ‘disorganised welfare mix’ (Bode 2006b), managerialist public governance entails long(er) chains of potentially ‘biased’ communication (as stakeholders often behave in instrumental ways), volatile patterns of inter-organisational coordination (as collaboration becomes strategic and episodic), as well as extra needs for governments to ensure provider accountability and seamless service provision (Christensen and Lægred 2011). Changes in the interface between public bodies and non-profit providers has resulted in uneasy ‘state-third sector’ relationships (Bode and Brandsen 2014) – notwithstanding recent (but often inconsistent) attempts to make these relationships more collaborative (again), for instance by the help of more formalised network arrangements (Reiter and Klenk 2019). A major mechanism at play here is (quasi-)market-based arrangements, which contain a potential for destabilising collaborative relationships especially in the case of a formalised purchaser-provider split. A strong source of disorganisation in this context is competitive tendering, forcing welfare organisations to permanently file new bids and invent or revise

concepts. This also pertains to contracts under a ‘black box’ regime through which funding bodies or private charities seek to optimise (seemingly) commensurable outcomes in human service delivery (Considine et al. 2018, dealing with UK labour market policies during the 2010s). While being less heavy in terms of formal prescriptions, this regime provokes permanent disorganisation as (almost) no formal prescriptions apply while risks related to a given mandate are difficult to control. The same logic is contained within so-called social impact bonds, that is, mandates for social intervention offered to private firms or social enterprises in some European countries (Chiapello and Knoll 2020). Once providers miss targets, they are in danger of losing external support, with activities being shifted to other undertakings that (have to) start from scratch. This mechanism may equally be at work in countries featuring a more coordinated process of devolving services upon non-state providers (Pauly et al. 2021).

Thirdly, managerialist public governance is prone to disorganise the balance of power established within relevant welfare sectors. Thus, funders and commissioning bodies are at times led to define deliverables without paying attention to possible intricacies at street level. More generally, bonds between providers and exchange among contract partners tend to be thinned out (Bode 2017a). In many European welfare states, both administrative bodies at the apex of public administration and quangos with regulatory or inspection roles have encompassing control functions, often under strong pressures from higher-ranking governmental imperatives, which may resort to budget cuts (for instance). As a result, local in-house providers and non-state contractors, exposed to more standardised mandates and a ‘value-for money’ orientation, have less discretion at the frontline while being caught in situations they can hardly influence, for example, upturns and downturns on the side of users, volatile funding streams, and staff turnover in a low-pay labour market. In areas in which users receive direct (welfare state) payments and select their ‘own’ service provider, ‘makers’ of welfare are equally faced by greater needs to dis- and reorganise, given that the respective demand may ebb and flow. Consequently, those ‘makers’ of welfare who end up having less power than in earlier times are constantly pushed towards provisional solutions while being faced with reduced organisational slack – that is, capacity kept in reserve, for instance paid standby staff. True, a process perspective on organisations (and organising) directs our attention to the muddling-through potential of collective actors, bolstered by the mobilisation of cognition and intuition ‘when situations are complex and fast-moving’ (Lorino 2018: 256). Thus, under certain circumstances, welfare organisations under managerialist regulation may withstand external pressures and even achieve powerful positions in the ‘quasi-market game’, for instance by credible threats to withdraw from a territory in which competent providers are rare. As the evidence re-examined in the fourth part of this book suggests, however, this capacity is contingent on the degree of institutionalisation of partnerships between commissioners and non-state providers. Moreover, power games and related strategies produce volatility in inter-organisational relations, hence nothing is carved in stone.

Fourthly, managerialist public governance materialises in special forms of numeric rationalisation. While official goals continue to be inferred from external mandates, those ‘makers’ of welfare who put these mandates into practice are often faced with expectations to deliver measurable outputs (Bode 2019a) – for instance, a certain quota of job placements, a given amount of service contact hours, or success rates in terms of completed therapies – even when performing social interventions that will only produce outcomes in the longer term (if at all). Once benchmarks are missed, disruption is likely to occur. Echoing an interpretation

of Bromley and Powell (2012), this implies ‘means-ends decoupling’, meaning that ‘policies are thoroughly implemented but have a weak relationship to the core tasks of an organisation’ (ibid: 485). In this process, the search for market success and measurable results involves a stronger emphasis upon formal objectives concerning issues such as turnover, market position or portfolio structure. In other words, procedural goals are decoupled from missions even as welfare organisations are urged to permanently reshape practices according to changing requirements. To be sure, according to the evidence summarised in this book, collective agency at street level frequently carves out its own way of complying with formal prescriptions. As mentioned above, however, managerialist governance has forced many undertakings to reduce organisational slack. Moreover, inspired by doctrines encapsulated in slogans such as ‘buy, not make’ or ‘steering, not rowing’, it has encouraged public authorities to outsource service packages to non-state providers and devolve economic risks to the latter, including by using ‘pay-for-performance’ compensation models. The hidden agenda has often included attempts at cost-shunting, given that, in a post-industrial context of dismantled labour laws, commercial providers can be assumed to economise on staff expenditure by paying less and demanding more. All this has come with the proliferation of highly formalised accountability schemes that make it more challenging to adequately respond to the specific situation of users and beneficiaries.

Fifthly, managerialist public governance puts enduring strain on welfare organisations because the latter are torn between incompatible environmental expectations. While being urged to save time and money, they are simultaneously faced by pressures to deliver in tune with classical objectives – for instance, equal treatment for all, case-oriented practice and patient service provision – that have persisted. This nurtures ‘institutional complexity’ (Greenwood et al. 2011; Waeger and Weber 2019), with agents exposed to more variegated and sometimes incompatible management imperatives and ‘compelled to simultaneously adhere to different prescriptions’ (Sirris 2020: 58). Under such circumstances, members may try to conform to a distinctive institutional logic and disparage another one – and subsequently notice that the systematic neglect of one particular concern at the expense of others is impossible under the tough monitoring of institutional environments such as public authorities. This experience creates a permanent need for improvisation, as shown by various case studies (see Part IV of this monograph). Social interaction at the frontline is often absorbed with preserving ‘essentials’ while responses to substantial organisational challenges remain pending (see Andersson and Gadolin 2020, for the case of Swedish healthcare agencies). In this overall context, practices of dis- and re-organisation abound.

Having said all this, not all welfare organisations react in the same way to the challenges they are facing. Concerning the mechanisms at work within twenty-first century welfare sectors, two of the patterns charted in Chapters 12 to 14 – organisational idiosyncrasy and compliance with institutional prescriptions – endorse a more disorganised process of welfare provision in a context of managerialist public governance. A third mechanism, namely conservative praxis, may mitigate external pressures but is put under constant strain. Organisational idiosyncrasy comes into play with providers willing, or being forced, to manipulate their compliance with extant prescriptions. This particularly pertains to private companies entrusted with organising welfare arrangements. Throughout Western Europe, these market players often respond pro-actively to the mantra of numeric rationalisation and quasi-market competition. Some of these firms prove quite potent, for instance by creating elderly care chains or hospital com-

panies (Pieper 2018; Armstrong and Armstrong 2020). Harnessing human resource policies typical of businesses operating in post-industrial service markets – such as tight staffing, dense output control, low-wage employment and imposed working time flexibility – they often outperform public or non-profit competitors in terms of (short-term) cost-efficiency. Making ample use of private capital for developing or redesigning their business portfolios, their policies influence the terms of trade across entire organisational fields because many purchasing bodies prefer (seemingly) cost-killing contractors. Within these firms, power resources often lie with managers who seek, or are compelled, to set limits to the level of discretion their agents have in the production process at the frontline. Inter-provider competition as such increases the likelihood of such policies, whatever the type of provider. As the case study evidence reviewed in this book suggests, any competitive regime encourages providers to concentrate organisational efforts on lucrative users while neglecting others. In the field of active inclusion policies, for instance, related strategies are referred to as ‘creaming’ and ‘parking’. The counterpart in the healthcare sector is the propensity of providers to discharge users as early as possible, regardless of problems associated with this (in terms of post-acute care and patient recovery). Elsewhere, such mission drift is more implicit, for example in the case of social enterprises preoccupied by consolidating their market position. Where welfare organisations are chasing after attractive mandates and easy-to-serve clients, welfare missions often come second.

Strict compliance with institutional prescriptions can have a similar effect. As equally demonstrated in this book, regulation inspired by NPM ideas has tended to discipline collective agency even in highly committed welfare organisations. In many places, such organisations have been urged to embark on a ‘leaner’ and sometimes ‘tougher’ process of welfare provision. With fluctuating mandates and resources, agents have been led to adapt their frontline work to the new ‘rules of the game’ and to reorganise their practice according to fluctuating mandates. Faced with public bodies whose decisions vary over time and break with entrenched routine, contemporary service providers mess with complex funding schemes and inspection regimes – hence they incur the transaction costs of ‘outsourced austerity’ (Bach-Mortensen and Barlow 2021). To respond to these intricacies, novel management models have mushroomed, and these involve an extended span of internal control in order to implement just-in-time responses to the more disorganised orchestration of welfare arrangements. Frequently, working under these conditions has become more ‘streamlined’ in technical terms, for example in terms of formal quality norms, assigned time slots or reporting duties. In addition, the (middle) managers involved are often expected to take strategic market issues into consideration when fulfilling their core tasks, with an eye on lucrative users, attractive projects or contracts ‘on offer’. In this respect, disorganisation in the process of welfare provision directly emanates from institutional prescriptions.

‘Managerialist’ public governance equally poses important challenges to conservative praxis with ambitions to tease out pragmatic solutions to wicked problems within a given organisational setting. Under managerialist governance, attempts to raise synergies across units, cases and organisational boundaries clash with fine-grained accounting systems both at provider level and in the encounters between welfare organisations and funding bodies. The ‘makers’ of welfare are faced with tension-ridden external expectations, such as being cost-efficient (measurable ‘value for money’) and effective, that is, doing all that is necessary. Moreover, volatile and changing mandates do not only entail the frequent reorganisation of

routines but also require a fluid management of boundaries with external co-actors. At the same time, numerous human service providers are faced with ever more formalised expectations to liaise with fellow organisations and to intensify cross-sectoral collaboration (see, for instance, Breimo et al. 2017). The underlying agenda is often vague, missions are ephemeral and rapidly evolving, and inter-organisational relations are suffused with instrumental attitudes, given the more competitive atmosphere throughout contemporary welfare sectors. Hence, the collaborative endeavour risks becoming disorganised in recurrent ways.

What does all this imply in terms of outcomes? While the ‘quasi’-scoping reviews in Part IV of this book were not aimed at evaluating the social impact of disorganisation in the areas under study, they suggest that the above dynamics have had substantial ramifications internationally. Thus, it seems that, in a context of ‘managerialist’ governance, arrangements expected to increase human welfare actually impede service delivery on purpose as programmes geared towards empowering families and children, disadvantaged workers or frail elderly people are often operated by disempowered organisations (Bode and Moro 2021). This even occurs when these programmes are generous in terms of budgets and entitlements. In many places, highly formalised prescriptions feed into ‘frozen’ time slots per case, flawed performance control and biased information-sharing. With altered modes of policy implementation, much depends on local ingenuity or ‘chance’ when ‘organising’ social welfare, even as it becomes more challenging to achieve given objectives by tinkering with available organisational tools. Regarding case-oriented people processing and social intervention at the street level, more ‘streamlined’ work processes tend to inhibit sensitive assessments, patient case work, recursive practice and critical (professional) reflection. Concomitantly, work settings have markedly changed throughout many welfare sectors over the last decades, exposing many agents to burdensome employment conditions and, in extreme cases, to situations of in-work poverty (Emberson 2019). Thereby, welfare arrangements risk becoming less sustainable and less effective.

At least, faced with enduring dis- and re-organisation, the ‘makers’ of welfare face (extra) barriers when trying to treat all users and claimants equally, ensure impeccable benefit administration and provide a similar quality of service provision to anyone. Novel management models tend to delimit continuity and reliability in the service encounter, as does the expansion of market-based user choice or service commissioning. The relational factor inherent in both social interventions and the enactment of administrative norms suffers from frequent shifts in the orchestration of welfare provision. Importantly, market rivalry within a given welfare sector produces winners and losers, even as changing mandates imply staggering responsibilities and creating fluid task environments. Once organisational conditions differ across a regional cluster of, say, social care non-profits, active inclusion firms or home care agencies, outputs vary as a matter of principle. Some providers or organisational units may excel while others eventually end up as poor performers and face strong economic pressure with reduced opportunities for improvement. Users less inclined or capable of selecting (new) providers are then left with ‘disabled’ organisations and likely to be served less well than those who have more ‘luck’ because they are looked after by providers that are sailing through calmer waters. The interplay of managerialism and disorganisation tends to make many family welfare or employment services less likely to sustain users over a longer period or in ways that are respectful of personal self-direction. Likewise, old-age provision becomes less safe regarding the universal access to reliable elderly care services.



While the observations thus far primarily refer to the realm of human service provision, disorganisation has become an issue in the area of ‘organised’ income replacement as well. Concerning this area of organised welfare provision, more pronounced movements of dis- and re-organisation emanate from an altered interlinkage between the economic system and certain income protection schemes. A key driver here has been the transition to a deregulated financial services sector with ensuing volatilities in the trading of bonds and assets, entailing rapidly changing and disparate conditions for long-term saving arrangements concerning, most prominently, private healthcare and long-term care insurance plans as well as funded retirement provision. Internationally, private sector agencies have become a broker of income replacement schemes, via acts of buying and selling, investment and divestment, uprating and devaluation. Thus, the extension of ‘pension capitalism’ has bred a complex architecture of private and occupational retirement plans which have come to constitute a strong but unstable pillar of old-age provision internationally. Left to strategies of profit-seeking players and the vicissitudes of market interaction – including on the investors’ side – retirement provision is ever less coherently organised (Dixon 2008; Clark 2017; Bode and Lüth 2021). Policy-making in this subfield, rather than building and adjusting a collective system of pension entitlements, is increasingly concerned with defining management rules for risky and heterogeneous saving arrangements (Berry 2021). As contracts, market regulation and stakeholder strategies change rapidly, old-age provision in the twenty-first century is continuously dis- and re-organised, with uneven outcomes for plan holders as a result.

An overriding message to infer from all this is that, under conditions of managerialist public governance, one should not put too much faith in the ingenuity of the ‘makers’ of welfare. Apart from the fact that modern organisations are always vulnerable to idiosyncrasy, these conditions expose the ‘makers’ of welfare to pressures that sit uneasily with the vision of social modernity. Where institutional prescriptions are driven by ambitions to make welfare provision leaner or more rigid, the scope for goal-sensitive collective agency becomes more limited overall. In this case, given the resource-dependency of welfare organisations and various pressures in terms of accountability, opportunistic behaviour is likely to occur, whatever an organisation’s potential to defend entrenched routines and to find provisional solutions despite external restrictions. To be sure, the previously mentioned processes of dis-organisation may surface along with public commitments to ensuring human dignity or social justice. However, under the circumstances depicted above, it becomes more demanding to fully meet these commitments at the street level. In a quasi-market environment, the economic value attached to a given beneficiary tends to influence the organisational behaviour of those who allocate services to users, as illustrated by welfare-to-work providers that differentiate between easy-to-place job claimants and a clientele with greater handicaps. Current market values may also play a role where elderly care providers (have to) privilege self-payers who are easier to ‘manage’ than people entitled to means-tested public benefits. In addition, the right to individual autonomy is ignored when providers are driven (or become motivated) to avoid more time-consuming acts of social support that respect the will of parents, jobseekers or care recipients. In all these dimensions, the organisational factor endemic to modern welfare arrangements turns into a catalyst for regressive tendencies, rather than being a resource for the project of social modernity.

### 17.3 DISSOCIATION AND 'PERSONALISED' SOLIDARITIES

The evidence presented in this book points to paradoxical developments, bearing witness to both welfare state expansion and dismantlement, as well as to expanding organisational settings in which welfare arrangements become disorganised. A further observation to be inferred from the analysis in this book is that, over the last decades, European welfare states have developed with movements of dissociation, meaning that certain welfare arrangements have become dissociated from ecological contexts, adjacent programmes and collectivistic foundations. Driven by 'individualising' public policies and orientations of 'egocentric' welfare state stakeholders, these movements combine with disorganised programme implementation and dynamics of dismantlement to impede the flourishing of social modernity in many instances. An important mechanism here is 'personalised' solidarities fraught with ambivalences inherent in the development of advanced modern societies, as discussed by various contemporary sociologists (see Chapters 1 and 2 of this book). Related trends are heading in different directions at the same time, hence the influence of emancipatory Enlightenment ideas on current welfare arrangements turns out to be uneven.

Basically, dissociation is a psychological concept to describe a condition of pronounced personal inconsistency, but it is rarely employed for grasping dynamics in social life and larger collectivities. Shildrick and MacDonald (2013) use the concept to elucidate the lack of solidarity among poor people; the notion also figures in Castel's (2000) work on processes of disaffiliation among marginalised sections of the post-industrial labour force. To some extent, the concept is consonant with accounts postulating an 'age of dualization' (see Emmenegger et al. 2012) in which so-called labour market insiders (can still) identify with classical social protection schemes while other parts of the citizenry feel excluded from them. While such cleavages are often less clear-cut than it seems, they indicate that welfare programmes have become (more) dissociated from each other concerning their respective internal logics. Dissociation can also occur when unchanged institutional arrangements fail to meet evolving circumstances in their wider ecology, for instance where public programmes become ill-adapted to post-industrial life courses. In part, this observation tallies with the 'new social risks' approach to welfare state problems which gained prominence in the early 2000s (see Bonoli 2005). Among other things, this approach suggests a partial misfit between extant institutional arrangements and ongoing social change. Irrespective of the fact that many of these risks are not that new and result from political interventions, this line of thinking hints at complexities inherent in post-industrial societies which make it more challenging to cast welfare arrangements from the same mould.

From a sociological perspective, the notion of dissociation can be used to characterise the interrelation of cognitive orientations and the texture of the wider social fabric of post-industrial societies. Bauman's (1995) tenet of a 'life in fragments' is an important signpost here. In Bauman's understanding, fragmentation occurs when basic (moral) principles, although persisting in formal terms, cannot be brought to fruition in 'real' human life as the latter has split into a set of isolated experiences in the spheres of work, family and politics. For many sociologists, related tensions are produced in the encounter of capitalism and the ever more individualistic life course of Western citizens (Fevre 2016). This chimes well with earlier accounts in critical theory that have argued that capitalism 'seduces' these people to define personal identities in relation to fetishised items while involving them in a compet-

itive battle for social recognition based on such items. More recently, Reckwitz (2021) has argued that a growing number of people have plunged into ever more ‘personalised’ worlds of consumption in order to flag out their ‘singularity’ and difference to others. As discussed briefly in Chapter 8, this attitude is assumed to be especially prominent among better-educated middle-class citizens. While the extent to which related orientations dominate the mindsets of contemporary Europeans remains open to empirical scrutiny, it stands to reason that this type of individualism makes citizens become (more) disinterested in collective public affairs.

Concerning all these processes of dissociation and their impact upon welfare arrangements in the post-industrial configuration, five overarching dynamics can be inferred from the analysis in this book. First of all, we can discern an individualisation of social welfare commitments through which some of the above arrangements lose reach while others become more accentuated – meaning that some values contained in the vision of social modernity attract increased interest whereas others appear less popular than in earlier times. In various respects, the above commitments reflect a more ‘personalised’ type of solidarity with fellow citizens. Thus, developments in civil society indicate that, among those social groups that are key players in this sphere, feelings of social compassion have increasingly become assigned to distinctive life situations or emergencies. In many instances, they are also cast in ‘marketable’ and consumer-ready products. Charity businesses and donation campaigns – which have a longer tradition in Anglo-Saxon societies – are recast in new forms and feature sophisticated tools to address fellow citizens with an intention to ‘help others’ on a spontaneous and voluntary basis (Lloyd 1993). In these contexts, solidarity is selective and connects with individualised forms of social engagement, for example project-based volunteering (Hustinx and Lammertyn 2003). Activists or donors are committed to enhancing the well-being of fellow-citizens, but these commitments are dissociated from the wider ecology of social problems and often run counter to the idea of institutionalised rights. More recent expressions of this pattern include the practice of charitable crowdfunding and the interest in ‘buying for good’ (Le Grand et al. 2021), that is, ethical consumerism. While attracting much interest, all these initiatives tend to sidestep the structural context of social disadvantages and personal misery – including the modern insight that human life is largely structured by supra-individual factors which can be influenced by public institutions writ large. This feature of the post-industrial configuration appears highly paradoxical: more than ever before, feelings of solidarity address unknown fellow-citizens and spark a willingness to support the latter on an anonymous basis. However, their personalisation implies that publicly institutionalised devices for ensuring such support are less likely to occur.

‘Personalised’ solidarities also seem to govern more formalised welfare arrangements – which hints at a second movement of dissociation within contemporary European welfare states. Indeed, certain provisions have been decoupled from both the genuinely collective or systemic character of social risks and those realms in which such risks are engendered. Welfare programmes aimed at improving individual welfare have expanded in many places, yet, at the same time, other institutions often fail to inhibit the (re-)production of social risks and incapacities to handle them. Thus, internationally, governments have enacted ambitious family policies as well as early childcare and education programmes, yet many parents continue to cope with deregulated labour markets, which put strain on their day-to-day lives and their own capacity to care. Furthermore, European welfare states have invested in employment services and active inclusion measures but, simultaneously, the power structure endemic to the

post-industrial organisation of labour produces revolving-door dynamics as opportunities for decent work are often narrow and unequally distributed. Likewise, efforts to boost personal care for frail elderly people peter out to the extent that, in many instances, target groups and caregivers must individually grapple with situations of ‘precariousness’ (Fine 2020). This is due to the limitations of extant care markets and the complexities intrinsic to post-industrial family structures, both conducive to an incalculable private care burden. In this vein, forms of social support that were once conceived of as categorical rights applied to collective living conditions have partially eroded, with welfare programmes being transformed into entitlements contingent on individual circumstances or (monitored) personal behaviour. While this particular logic had already impregnated programmes developed during the twentieth century (e.g., means-tested welfare benefits), it has become more intrusive with welfare reforms enacted in recent times and nowadays applies to a larger set of life situations. In some countries, family and child welfare systems have come to follow this logic on a greater scale and focus on (assumed) individual ‘deficits’ of their clientele. Individualising policies also affect situations of unemployment lasting longer than a few months or chronic work incapacity. Concerning income replacement, pay-as-you go arrangements – through which achieved standards of living are nearly maintained – protect a lower proportion of jobseekers than they did in earlier times, given that many beneficiaries have been transferred to social assistance or work activation programmes. The dismantling of relevant regulatory frameworks – for instance, the curtailment of benefit periods, the facilitation of short-term work contracts and reduced protection against dismissals – downgrades the role of collective schemes which have long been considered as ‘normal’ among wider sections of the (wage-dependent) working population. Importantly, this trend also touches upon the so-called labour market insiders since the above-mentioned welfare reforms signal future threats and may serve as a tool for disciplining workers – at least in contexts of high unemployment or for occupations subject to strong ‘in-work recommodification’ (Dukelow 2021: 127–8). Concerning the organisation of later life, the extension of funded (defined contribution) pension plans at the expense of classic social security schemes and defined-benefit arrangements reflects a similar trend. Notwithstanding that entitlements to basic pensions have expanded in many jurisdictions, this movement implies an individualisation of retirement provision and indicates a shift to a regulatory state that shapes contexts for welfare provision rather than outcomes (Leisering 2011). The intricacies of the post-industrial labour markets (featuring low pay and interrupted careers) combine with an erratic financial sector to produce considerable uncertainty concerning a worker’s income in later life. Citizens are expected but often fail to operate as ‘wise’ consumers, be it on the private savings market or as a member of an occupational (defined contribution) pension plan. This also pertains to the field of private care insurance since long-term care systems, despite their recent extension, have remained deficient in most countries.

A concurrent, third movement of dissociation – which overlaps with the aforementioned development – materialises in mismatches between different welfare programmes taking effect in one and the same ecological universe. This is most salient in child and family welfare systems. Thus, throughout most European welfare states, efforts to develop both family benefits and early education services are geared towards empowering disadvantaged children whereas programmes enacted in parallel involve a potential disempowerment of parents in their working lives. For numerous fathers and mothers, some of these programmes come with increased risks of social deprivation which are endemic to more intrusive means-testing

and imposed ‘activation’ measures. Thus, in a context in which many adults are faced with tough challenges, such as family disruption and union (re)building, welfare arrangements addressing disadvantaged children become dissociated from policies addressing their parents (Bode and Moro 2021). Other programmes imply similar contradictions. For example, most European jurisdictions have extended personal rights for disabled citizens – such as options to use personal budgets – without interference of others. However, this has often occurred in a context of more coercive activation policies (Aucante and Baudot 2018; Bambra 2019). Moreover, to the extent that such ‘personalisation’ comes with a thinning out of more classical forms of institutionalised social support (such as professional case management), extended liberties may come with a loss of reliable help (Mladenov et al. 2015). A similar mismatch has occurred with the expansion of long-term care entitlements along with the marketisation of service infrastructures, which tends to penalise citizens unable to act as informed consumers on a complex and volatile care market. Here as well, ambitions to provide citizens with new opportunities (and greater individual choice) clash with other policies enacted in parallel.

Fourthly, in the new millennium, welfare arrangements are valued differently concerning the different stages of the post-industrial life course. Indeed, discrepancies between generation-specific welfare programmes hint to yet another dimension of dissociation, with ‘personalisation’ playing a role here as well. Public commitments to child empowerment have remained strong or have even been growing internationally. According to a widely held conviction, children are ‘innocent’ and deserve equal starting points. International bodies such as the United Nations view the empowerment agenda as corresponding to what they understand as inalienable personal rights. Contemporary commitments to early education and child welfare follow this logic, as indicated by the popularity of the social investment hype among political elites in Europe. Concerning the stage of old age, the attachment to ideas of human dignity remains solid – but related commitments appear less wide-reaching and are often confined to basic levels of welfare provision. Indeed, twenty-first century welfare states in Western Europe have seen a partial ‘divestment’ in collective institutions aimed at protecting the aged. The concept of social security has lost ground as pension policies in the new millennium are less eager to preserve a once achieved standard of living throughout the silver years. The most striking contrast to the child empowerment agenda is found within welfare arrangements in the area of work-related welfare programmes. Many European countries have seen a wide-reaching re-commodification of employment protection, epitomised by downsized unemployment insurance schemes and work-first policies (see above). In light of this, the vision of decent work for all seems to have faded with the transition to the post-industrial configuration. While, concerning this stage of the life course, institutionalised collectivism has remained strong when it comes to medical treatment and work-related rehabilitation, many contemporary Europeans in their working age are faced with less scope for personal self-direction and increased market dependency, which sets limits on norms of social justice in the sense defined earlier.

A fifth movement of dissociation is located in the realm of politics and corresponds to ‘personalised’ solidarities in yet another way. It has surfaced under circumstances that Fraser (2017) has encapsulated in the notion of ‘progressive neoliberalism’ (for a critical review, see Joppke 2021) and connects with the proliferation of ‘identity politics’ (see Bernstein 2005). The related agenda is rooted in social movements calling for a rigorous acknowledgment of human diversity, for instance in terms of gender, sexual orientation, ethnic background or

personal (dis)abilities. Concerning organised welfare provision, policies echoing this claim have committed themselves to fostering the welfare of citizens with distinctive traits in the above dimensions. These policies may be employment-related – and proclaim, for instance, a priority of workers from these groups in recruitment processes (by ‘affirmative’ or ‘positive action’, as it is labelled in the Anglo-Saxon world). They may also materialise in special arrangements for these groups within educational or social care institutions. Notably, this overall agenda has stretched out into the world of private business, as many companies have flagged out diversity-oriented human resource policies and ‘corporate social responsibility’. This trend is sometimes understood as a signpost of a new ‘woke capitalism’ (Rhodes 2022) in which corporate elites are led to take a stance against social discrimination along ethnic and biological lines.

In general, identity-based policy approaches harbour elements of dissociation in that they draw a line between social inequalities produced in the wider economic system, on the one hand, and social discrimination due to personal traits, on the other. The emphasis lies on individual rights to enter into market competition on a level playing field – which, once again, signals a strong influence of the idea of ‘personalised’ solidarity. At the same time, policies under the influence of progressive neoliberalism accept that norms related to meritocracy and market competition become more influential in the engine room of democratic capitalism, glossing over the properties of the capitalistic economy which tends to make life course opportunities inequitable in systematic ways. Hence identity-based policy approaches – and welfare arrangements inspired by them – promote certain Enlightenment ideas while stripping off others, including some of the principles contained within the vision of social modernity. Their pledge for both a more rigorous defence of human dignity and a greater scope for personal self-direction is motivated by – thoroughly modern – insights into the role of social forces which operate beyond individual discretion (e.g., collective discrimination) and impact upon the welfare of people. At the same time, however, this logic is not applied to other sources of social inequality.

Meanwhile, it has been argued that ‘progressive neoliberalism’ has lost ground, given the rising influence of right-wing populism and its opposition to any progressive thinking (Fraser 2019). In most parts of Western Europe, however, the ruling political establishment has remained ‘on track’ concerning this philosophy (Raschke 2019). As shown in Part III of this book, various policies have addressed people subject to social discrimination because of certain personal traits, fostering, for instance, the professional career of skilled women through measures facilitating access to higher positions in post-industrial labour markets, or social minorities via special educational programmes. In contrast, few political initiatives during the last decades have tackled the ‘impersonal’ dynamics working behind the (re)production of socioeconomic hardship, for instance rising power differentials in wage-setting processes due to reduced capacities of collective agreement systems – which also affect these minorities as well as numerous lower-class women and their families. Likewise, European countries have seen increased efforts to ban any differential treatment of foreign-born individuals and people of colour (see the contributions to Solomos 2020), yet they have barely engaged with those dynamics through which disadvantaged citizens – including many immigrants – become entrapped in underclass positions (due to the spread of precarious work contracts, for instance). Overall, identity politics have hardly challenged the mechanisms through which dis-

advantaged people, such as school-leavers or lower-class (including female) workers, become pawns of powerful market players.

Importantly, the rise of right-wing populism in Western societies during the last decades suggests that, in the post-industrial configuration, identity politics clash with concerns of ‘traditional’ social milieus who feel ignored by ‘their’ state (Iversen and Soskice 2019). While perceptions of these milieus have often become imbued with regressive political orientations, they echo a movement through which government action with emancipatory ambitions is dissociated from other policy agendas. A case in point is immigration policies since the 1990s. Notwithstanding various restrictions for foreign-born citizens to work and live in Western Europe, governments have welcomed the arrival of certain groups of immigrants, for instance those stemming from Eastern EU countries, refugees leaving a war region and skilled workers. Driven by both humanitarian concerns and economic interests in cheap human capital, a selective ‘open-border approach’ has become hegemonic in many European jurisdictions, endorsed by broad coalitions including mainstream academics, social democrats, centre-right parties and wider sections of the economic elites (Streeck 2018). It holds true that this alliance has floundered more recently, for instance in post-Brexit UK, Italy or in the Nordic countries. Moreover, the EU seems to have become more restrictive concerning the admission of refugees. The ‘supply’ of immigrants remains high, however, and some Western governments (e.g., Germany) continue to run campaigns to recruit skilled workers from the Global South. Importantly, the above approach dovetails with the erosion of nationally entrenched systems of income distribution within European nation-states. Expressed in capitalist language, ‘low performers’ from the native population – once covered by (comparatively) generous social protection frameworks – have come to confront ‘high performers’ from abroad who (initially) accept poor working conditions and modest welfare arrangements. True, immigrants frequently become entrapped in lower-class positions while providing a net benefit to the welcoming society. That said, over the last decades, immigration has been found to exacerbate social divisions in some parts of Europe, in part because it fuels the competition for decent jobs in the lower social strata (see Slettebak 2021, with an overview of the general debate and data for Norway). Under certain conditions, this accommodates the interest of employers in avoiding wage increases due to a lack of workers. At least from the perspective of many native ‘insiders’, public policies have abandoned the idea of a national ‘social welfare community’ and replaced it with expressions of international solidarity which, while aligning with progressive values rooted in anti-racism, centres on individuals with specific (e.g., ethnic) traits.

All in all, given the multi-dimensional drift towards ‘personalised’ solidarities, we can discern a fragmentation of human progress and a bifurcation of the project of social modernity. In the new millennium, commitments to values associated with that project vary considerably with perceived problems and life situations. Indeed, trends have not been ‘the same across all welfare state programmes’ (Jensen et al. 2019: 689), and contemporary Europeans can sense ensuing inconsistencies across their entire life course – in their roles as a parent, waged worker and (fragile) pensioner – or may observe them as a member of an extended family or in their circle of friends. In general, it seems that, over the last decades, the interplay of economic, political and cultural dynamics has entailed an increasingly incoherent assembly of welfare arrangements, putting the above project under ‘systemic’ strain – which begs the question whether this development is irreversible.

## 18. Options for the future

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The final chapter of this book will discuss possible options for the future in light of the above diagnosis. It probes the fate of social modernity by discussing prospects of welfare reform that, being consonant with values of human dignity, social justice and (considerate) individual autonomy, exhibit a progressive character. The starting point for this endeavour is the set of observations made in Chapter 16, namely the contention that, given the evidence presented throughout this book, ideas borrowed from the vision of social modernity are deeply engrained in contemporary Western European societies. The fact that this vision remains alive and in demand in important dimensions, as well as the ‘technical’ feasibility of interventions inspired by that vision, suggest that these societies are not clueless when it comes to safeguarding and amending emancipatory welfare arrangements, or developing new measures in line with progressive aspirations. Discussing concepts for welfare reform that circulate in contemporary Europe appears an appropriate avenue when gauging the prospects of organised welfare provision in this world region. Indeed, such concepts ignite debates in academic or political circles, including at EU level. A good example is the report drafted a while ago by a group of experts seeking to explore ways of ‘ensuring the future of social protection’ in Europe (European Commission 2023). Written on behalf of a pan-European policy body, this report puts forward suggestions which sound progressive in the above sense, for instance those aimed at achieving ‘enhanced social cohesion’ and ‘inequality reduction’ (ibid: 23). According to the report, vehicles for this include, for instance, bold public support in the area of childhood education and care services, better access to social protection regardless of a person’s employment status and progressive taxation to fund welfare state activities more generally. However, as will be set out in greater detail below, not all suggestions under debate are game changers and accord well with the vision of social modernity. Hence, in what follows reform concepts are put to a test regarding their potential fit with the set of principles charted in this book’s theory section – starting with those approaches that eventually will not pass this test (18.1). Thereafter, the focus is placed on more ambitious ideas, showing a potential to propel social modernisation (18.2). Finally, we should engage with the conditions that would have to be met for these ‘truly’ progressive concepts to be rolled out in the near future – given the fact that reforms need to be embedded in the post-industrial configuration of twenty-first century European societies (18.3). The quintessence of all this is that for those sympathetic to socially progressive ideas, ‘optimism tinged with realism’ (Delanty 2021: 31) would be a smart choice – provided that we ponder available options by ‘anchoring future possibility in the present’ (ibid).



## 18.1 RE-VISIONING SOCIAL MODERNITY AND CAPTURING THE PITFALLS OF SEMI-PROGRESSIVE SOLUTIONS

As noted, social modernity can be viewed as a promise which up to present times nourishes aspirations of wider sections of the European population. Certainly, the principles that this book has defined as benchmarks for assessing the fulfilment of this promise are rather vague. Moreover, concretisations of this promise may not always find vast public support. Proponents of critical theory suggest that in the social world(s) we are living in many citizens are impeded from openly discussing these concretisations and, more generally, the value base for agreements that would govern their common public affairs. Scholars from this camp assume that these citizens, once provided with sufficient cultural and political ‘capital’, would be willing to embark on the process of finding a more balanced distribution of material wealth and life course opportunities, notwithstanding the plurality of interests and normative perspectives among a given citizenry. Voters from underprivileged backgrounds – in terms of education or personal wealth – would be particularly interested in this process and endorse concepts that provide them with better outcomes. Some parts of the population, these scholars would admit, will never share the value base underlying the vision of social modernity, for instance, because they defend a highly meritocratic organisation of the economy and deny that social positions arise from supra-individual dynamics unfolding in the wider society (including the subtle exercise of power under the lead of economic elites). ‘True’ democracy might nonetheless involve a fair(er) deal for all citizens concerning their capability to shape their lives according to extant preferences and without penalising weaker members of society. Hence there is a case for exploring available options.

In doing so, critical realism invites us to start from what already exists in the imaginary of current societies, rather than embarking on attempts to build a ‘utopia’ from scratch. This is a good entry point for re-visioning social modernity, to apply a notion employed by Jessop (2000) in his reflections about the future development of Western welfare states amidst a global capitalistic order, which, as he reminds us, continues to depend on a non-capitalist infrastructure. Concerning this infrastructure and the latter’s institutional as well as organisational foundations, the ‘here and now’ comprises resources that can be used to shape future social development. These resources are also ideational in kind, meaning that various concepts for (re-)shaping welfare state institutions circulate in the public sphere. Some of these concepts have influenced recent agendas by centre-left political forces, as well as academic circles in their environs. In what follows, five of them will be put to a theoretical ‘test’ concerning their fit with the vision of social modernity as defined earlier. This ‘test’ will bring to the fore that these concepts align with elements contained in that vision, but they come with various pitfalls which are crucial to identify. Eventually, these concepts can be conceived of as ‘semi-progressive’ approaches which may contribute to make social modernity flourish (again) once further provisions are made.

To begin with, various reforms in European welfare states have drawn on the idea of blurring boundaries between the state and the market, with related legislation being justified by both their alleged impact upon personal self-direction and assumed benefits in terms of cost-efficiency – that is the state’s capacity to offer citizens a maximum level of social support (Le Grand 2007). Two approaches are outstanding in this line of thinking, namely, public–private partnerships imagined as a project-based collaborative arrangement between

commercial firms and public sector entities and the model of citizen-consumer choice, which has been a centrepiece of New Public Management (NPM)-driven policies (see above). The common denominator of the two approaches is the strategic use of institutions established in the capitalist economy – namely, for-profit businesses and open competition – for welfare ends, in order to orchestrate or organise the delivery of public goods.

Public–private partnerships have often been viewed as an instrument to boost welfare state capacity. In essence, they serve as a funding model for the building and management of public sector facilities including areas of organised welfare provision, such as care homes or hospitals (Hodge and Greve 2018). In contrast to mere privatisation, the state maintains institutional authority over these facilities, but for-profit firms bring in their own expertise and capital to strengthen them. In a slightly different understanding, public–private partnerships are also viewed to be at work with arrangements through which statutory entities and commercial (or sometimes also non-profit) organisations join forces for the delivery of a distinctive service or activity, such as urban regeneration, the training of disadvantaged young adults or occupational pension provision. In all cases, such arrangements have a potential for intermingling different skills, approaches and experiences in order to create win-win situations. That said, they come with various downsides when seen in the light of the vision of social modernity. Thus, the above funding model is fraught with unfulfilled promises concerning the calculated savings for the public purse, as well as with the problem of limited public control over the fulfilment of contracts (which concerns, for instance, the management of facilities constructed by private firms on behalf of public authorities). The collaboration between corporate actors and the state may also have more subtle ramifications. In many places, partnerships have been justified by the management skills of private sector professionals and related options to develop new shared knowledge. A potential effect of this, however, is the crowding out of the public sector rationale by a ‘corporate spirit’, which turns citizens and public servants into mere human capital. In terms of professional culture, the emergence of ‘corporatized politics in the public sector’ is prone to elicit a ‘dissociation from the public service identity in favour of subjectivation to the market’ (Abildgaard and Mølbjerg Jørgensen 2021: 2; 4; 7). This affects the value base of the involved welfare organisations insofar as the latter are driven to sidestep issues of social justice, the case for human dignity, or ambitions to promote personal self-direction.

The idea of ‘citizen consumer choice’ (Teodoro et al. 2022: 38) is inextricably linked to the establishment of welfare markets as depicted earlier (see also Clarke et al. 2007). In these markets, choice concerns public goods which citizens ‘consume’ with the help of welfare state entitlements. This general approach, resonating with the modern idea of personal self-direction, translates into an institutional arrangement in which providers of these goods are pitted against each other via a benchmarking tool, even as beneficiaries receive direct payments or tax breaks to buy preferred services (Ledoux et al. 2021). Such arrangements, proliferating in various parts of Western Europe since the 1990s, have often been endorsed by social movements, for instance spokes(women) of disabled citizens or political forces sympathetic to extending individual social rights. As shown in the Parts III and IV, however, the contribution of welfare markets to making social modernity more vibrant appears modest. Their emancipatory potential is selective as many users of ‘marketised’ welfare programmes do not conform to the imagined figure of the informed and wise consumer. Furthermore, concerning the action of ‘makers’ of welfare, human dignity is not a priority under market

pressures – let alone in the domain of rent-seeking enterprises. The case studies portrayed in Chapters 12 to 14 have shown that human service delivery under such pressures often involves service disruption and disorganisation. Related collective experience may create public distrust concerning the regulatory capacity of public bureaucracies. Concerning ‘outsourced’ welfare arrangements more generally, it thereby undermines attempts to bring the state back in (see Teodoro et al. 2022, who have explored this for the provision of drinking water in the US). In addition, under a competitive procurement regime, poor ‘market performance’ – for instance in terms of lost contracts or unfilled places – reduces a welfare organisation’s capacity to develop alternative strategies and to cater for users who have not (yet) changed their provider. Hence, while citizen consumer choice may entail new options for some sections of the population, others risk paying the bill. Likewise, concerning income replacement schemes which citizen-consumers purchase on the financial market, the experience with the pension industry and the private healthcare insurance sector suggests that uneven outcomes in terms of coverage and asset security are very likely to occur. In this universe, market value eventually matters more than personal dignity or the respect for human effort, that is, the idea of social justice.

A related approach to welfare reform (writ large) is, thirdly, public action to promote what is encapsulated in the idea of civic solidarity and the ‘co-production’ of social welfare. In recent times, concepts inspired by this idea have been quite popular as a reaction to rising inequality, social exclusion and crumbling communities across Western Europe (Evers and von Essen 2019). Internationally, a well-known expression of civic solidarity has been independent charitable action and voluntary work. Related initiatives have an extensive tradition in the Anglo-Saxon welfare mix where they have long been seen as being independent from government. Across mainland Europe, activities in this realm have equally played an important role during the establishment of the modern welfare state, albeit alongside distinctive institutional arrangements. In some European jurisdictions, non-profit organisations have grown as partners of public authorities and as places for professional practice; elsewhere, they have been conceived of as social cooperatives, or associations of welfare state stakeholders without productive roles. In all contexts, volunteering has been an important building block and an expression of private commitment to common causes. From the 1990s onwards, the Western world has seen the proliferation of models or policies fostering non-commercial and non-state welfare provision as an alternative to public sector-based arrangements, or at least as a strong add-on. A more recent version of these concepts has consisted of developing emancipatory practice (further) under the banner of social enterprise (Laville et al. 2015; Hall et al. 2016). This has been paralleled by a discourse promoting the ‘co-production’ of public services by stakeholders and users, that is, lay people (Voorberg et al. 2015; Loeffler 2021). In all these contexts, the thrust in civic solidarity relies on citizens who embark on voluntary work, pro-social engagement or self-help in the welfare field. While social entrepreneurship in its various forms is expected to identify innovative responses to virulent social problems (Jenson 2017), more classical voluntary action may be bolstered by for-profit businesses interested in show-casing ‘corporate social responsibility’ (Frynas and Yamahaki 2016). As for ‘co-production’ projects, civic solidarity may mobilise groups of public service stakeholders who embark on collective activities to improve their own well-being with (material or logistic) support from public authorities – although it should be clear that this often presupposes altruistic support from volunteers to people unable to help themselves. More generally, the concept of

co-production also contains commitments to enable democratic participation in the design of welfare programmes. Arguably, different varieties of such civic solidarity undergird collective effort aimed at promoting disadvantaged populations. Related initiatives mirror the interests of wider sections of the Western European population in combating distortions arising from the modernisation processes under democratic capitalism. In this sense, they signal a diffuse attachment to ideas contained in the vision of social modernity. Furthermore, activities in the above contexts impact upon public opinion and can be considered as laboratories for inventing new forms of social intervention. Historically, this practice – often couched in the term social innovation – has often emerged in the universe of grassroots action inspiring new institutional solutions to pressing social problems (Cohen et al. 2017). Under such circumstances, civic solidarity may ‘crowd in’ welfare state activities and contribute to ‘organizing hope’ outside the state and beyond (conventional) market transactions (Ericsson and Kostera 2019).

Yet do activities in this universe fully conform to the principles of social modernity? One is tempted to have doubts, at least when taking the vision of social modernity as a yardstick. Indeed, the imaginary of civic solidarity and co-production being the silver bullet for solving issues emanating from the vagaries of post-industrial societies has eminent shortcomings. Charitable and lay action can never replace social rights, as it rests on arbitrary decisions. Furthermore, concerning social enterprises, their managers are permanently at risk of privileging short-term income generation over tenacious and patient practices of social intervention, given the fact that, at some point, they can be faced with serious economic hazards. In addition, these organisations are likely to exhibit a democratic deficit. Especially within competitive markets populated by commercial firms which expose such organisations to the ‘danger of being sucked into the race to the bottom’ (Johanisova and Wolf 2012: 565), they fail to become part of a ‘system of checks and balances on economic power and support for the right of citizens to actively participate in the economy regardless of social status’ (ibid: 564). Apart from this, social entrepreneurs and sponsors who donate greater amounts of money bring their personal – and possibly idiosyncratic – preferences to bear. Likewise, co-production projects presuppose the input of private resources in terms of time and money, which are unequally distributed throughout the wider population. Initiatives from this wider universe are often dominated by middle and upper-class citizens and have no wider democratic legitimation. This may clash with emancipatory values, given the strong political affinity of wealthier people with the inegalitarian status-order of democratic capitalism (see Arndt 2020). There are further risks of ‘voluntary failure’ (Salamon 1987), namely, insufficient resources to meet demands on a greater scale, a particularistic definition of target groups (along ethnic, religious or ideological lines, for instance), as well as limits in developing professional credentials and specialised knowledge needed to provide effective services. Similar limitations apply to co-production projects in which volunteers work with (local) state agents to provide and improve services or programmes. Such volunteers may not be available when needed most, they may defend values of distinctive social milieus and – given the potentially capricious character of unpaid benevolent action – their activities will rarely be as effective as those of mainstream organisations based on paid and specialised staff. In the context of twenty-first century Western Europe, moreover, civic solidarity frequently stands and falls with market success. Charities are involved in competitive fundraising activities whereas social businesses depend on the behaviour of market rivals, including those who are indifferent to benevolent purposes. As for non-profit organisations involved in human service provision, an increased

pressure to become business-like has entailed problems with maintaining and developing their civic potential (see Bode 2013; Alexander and Fernandez 2021). Concerning the impact of corporate social responsibility, the benevolent action of private firms risks being corrupted by hidden business interests, resorting to strategies of ‘woke washing’ (Rhodes 2022: 8) in order to ‘gain customer support and ultimately commercial gain’. What is more, such action may serve to strengthen the political influence of the corporate elites (ibid), with their philanthropy turning into an ‘exercise of capitalistic power’ (ibid: 166). Under all these circumstances, it is difficult to see how human dignity can be guaranteed by private actors, how social justice can be endorsed by social businesses without considering market constraints and how personal self-direction can be fostered in sustainable ways under conditions of arbitrary voluntarism, selective engagement and an unpredictable ‘moral marketplace’ (Singh 2018). Things are different with institutionalised partnerships – referred to as ‘third party government’ by Salamon (1987) – between public authorities and professionalised non-profit organisations employing specialised staff. In this universe, non-state initiatives are interwoven with state action and reach beyond volatile approaches to improve the well-being of disadvantaged people – hence they cease to be essentially private. Under these very conditions, co-production projects may yield positive results for greater constituencies over a longer period (see below).

A fourth ‘trendy’ concept for achieving human progress in purposeful ways that is gaining prominence in recent times is the paradigm of social investment. Propagated by the European Union and various member states, it has gone viral with the onset of the new millennium and remains influential in politics as well as parts of the academia (Garritzmann et al. 2022). Basically, the concept stipulates extended welfare state expenditure for areas such as childcare, the educational system or programmes to enhance the employability of workers, according to an agenda ‘under which policies strengthen people’s current and future abilities’ (European Commission 2023: 35). As this implies stronger public responsibility, the concept is often presented as an alternative to neoliberal austerity policies. Indeed, social investment strategies involve greater collective efforts concerning organised welfare provision and have a potential to enhance the well-being of certain groups of citizens. This pertains to parents (above all mothers) who are given new options when shaping their life courses in terms of work-life balance and job careers, but also to disadvantaged children who might benefit from additional learning opportunities and an ensuing upward levelling of educational (and social) inequalities. All this may improve opportunities for personal self-direction among the wider population and reduce the dependence on welfare programmes aimed at preserving human dignity.

That said, the social investment paradigm exhibits important flaws. On the one hand, it signals that public policies can enhance social equality by shifting welfare state budgets to arrangements expected to enhance the productivity of human capital – for instance, early education curricula and job training schemes. It is assumed that this will cascade into higher states of well-being across the entire population. However, as such, improved (job) skills do not automatically change the status order in a given society, nor do they necessarily produce a labour market equilibrium amenable to higher pay or less precarious jobs (Parolin and van Lancker 2021). Social investment policies might increase the output of human capital, but, with everything else remaining unchanged, the social divisions endemic to the post-industrial configuration are likely to persist in a context within which work-related welfare arrangements remain dismantled and waged employment is highly (re-)commodified. On the other hand, the

social investment agenda is overly selective as it tends to concentrate all public efforts on those parts of the population deemed to be able to develop their human capital further. Numerous welfare state stakeholders – the chronically sick, the disabled, the old, the socially marginalised – are easily overlooked because ‘investment’ in these people appears futile according to the above paradigm (Laruffa 2018). Altogether, this implies that human dignity and personal self-direction become subordinate reference points of welfare reform. Thereby, the underlying approach risks impeding attempts to conciliate extant human concerns with the economy by adapting the latter to the former, for instance through efforts to de-escalate dynamics of toxic educational competition and extend job choice options of workers by (more) comprehensive social security schemes.

Both the social investment agenda and the promotion of civic solidarity have become understood as a remedy against soaring poverty. Concerning this phenomenon, however, a much more radical proposition in the social policy debate internationally has been the introduction of a universal basic income – which is a fifth, increasingly popular concept that might be understood as being highly consonant with the vision of social modernity. Importantly, this concept counts on the mobilisation of collective solidarity enforced by the state, rather than on voluntarism or the (alleged) virtues of the (regulated) market. Despite being an old idea, it has attracted new interest in the post-industrial configuration (Torry 2021). Increased poverty rates, widespread precarious work conditions, and the experience with workfare programmes have made the concept appealing to progressive movements and academics – notwithstanding that it has also gained support among proponents of economic liberalism, with hopes that it might replace complex welfare bureaucracies, help curtail job protection rules or even reduce welfare state expenditure in total. In some ways, moreover, the hype around this concept resonates with the growing importance of minimum benefit programmes in Western Europe. As set out in Part III of this book, these have partially substituted income replacement schemes that mean benefit levels depend on previously earned salaries and periods spent in waged employment.

Unlike extant minimum benefits, a basic income is expected to be unconditional and non-withdrawable. It is mostly conceived of as a public allowance at subsistence level with no further strings attached and is paid automatically to all members of a given national community. Hence beneficiaries are not obliged to engage with gainful employment, even as – at least according to some models – the allowance may be combined with comprehensive entitlements to human services (health; social support etc.). Since the allowance is paid over an entire life, it also replaces minimum pensions. Internationally, there have been various (local) experiments with a (fixed-term) payment of such a benefit, with the aim of evaluating implications concerning the well-being of recipients and their behaviour on labour markets. A panoply of models has been under debate, which makes it tricky to discuss all details and problems associated with them at this point. It appears obvious, however, that the overarching objectives of all these models are the reduction of extreme poverty, on the one hand, and the creation of enhanced liberties to engage with work activities, whether paid or unpaid, on the other. Apart from contextual issues, an unconditional basic income can obviously contribute to respecting human dignity since each beneficiary is acknowledged as a full person with rights to participate in public life without any further condition. Moreover, it is prone to enhance personal self-direction. To some extent, its introduction would also resonate with social justice values since a community awarding such a benefit would honour all sorts of activities in an

individual's life course, regardless of the market value attached to them. From this vantage point, a universal basic income seems to conform to all of the principles this book argues to be inherent in the vision of social modernity.

That said, once this concept is placed in the wider context of post-industrial democratic capitalism, this congruence with the imaginary of social modernity appears questionable in a couple of respects. This becomes most obvious when turning to those citizens who are deemed the primary target group of the concept, namely poor or precarious people in their working years (Birnbaum and De Wispelaere 2021). One concern with the basic income concept resides in the fact that the chances for its implementation are growing to the extent that other social programmes are curtailed or abolished, simply because it seems politically unlikely that a generous basic income scheme would be introduced on top of the current welfare state apparatus. Given the enormous implementation costs and the widespread reluctance of powerful ('net') taxpayers to fund it, other forms of income replacement may not survive the introduction of such a scheme. These forms may be replaced by commercial arrangements paid for privately, for instance in the areas of long-term care insurance, retirement provision and social care for 'average citizens'. As these arrangements are based on a market rationale, citizens with higher risks and lower 'market value' (that is, income) would lose out and enjoy less protection or pay relatively more to receive adequate services which, arguably, would constrict the space for self-direction in their lives. In this context, furthermore, the power of employers over workers, especially the aforementioned target group of low-income earners, would rather increase than shrink, as political initiatives against the maintenance (let alone the extension) of standard employment protection might rapidly surface. More generally, collective responsibility for ensuring decent work for all could appear less legitimate, with everything else remaining unchanged. Rather, once a (low-level) safety net for all is put in place, employers 'may enthusiastically welcome opportunities for enabling part-time, temporary or low-paid jobs instead of offering stable and adequately paid employment as part of a broader agenda of shedding labor costs' (Birnbaum and De Wispelaere 2021: 920). Under these circumstances, a basic income would hardly provide precarious workers with opportunities to find a better job. Social divisions could turn out to be more, rather than less, pronounced – which would undermine efforts to ensure human dignity by public interventions as well as social justice based on the respect for human effort throughout a working life with periods in undervalued or underpaid occupations. After all, much depends on the design of a given minimum income scheme and the way it is intertwined with further forms of organised welfare provision. For example, the above perverse effects might be less pronounced when entitlements are bound to distinctive life situations (such as being a young parent, a long-term jobseeker, a disabled person) and incorporated into a comprehensive social security scheme with mild conditionality (see below). Be that as it may, campaigns and initiatives advocating a basic income scheme signal new expectations towards the state as a distributor of economic resources. Unlike concepts relying on civic solidarity, markets and private sector involvement, such a scheme re-emphasises the role of the sovereign in shaping those agreements by which contemporary European societies might regulate common affairs. From this perspective, the idea of an unconditional safety net is thoroughly modern.

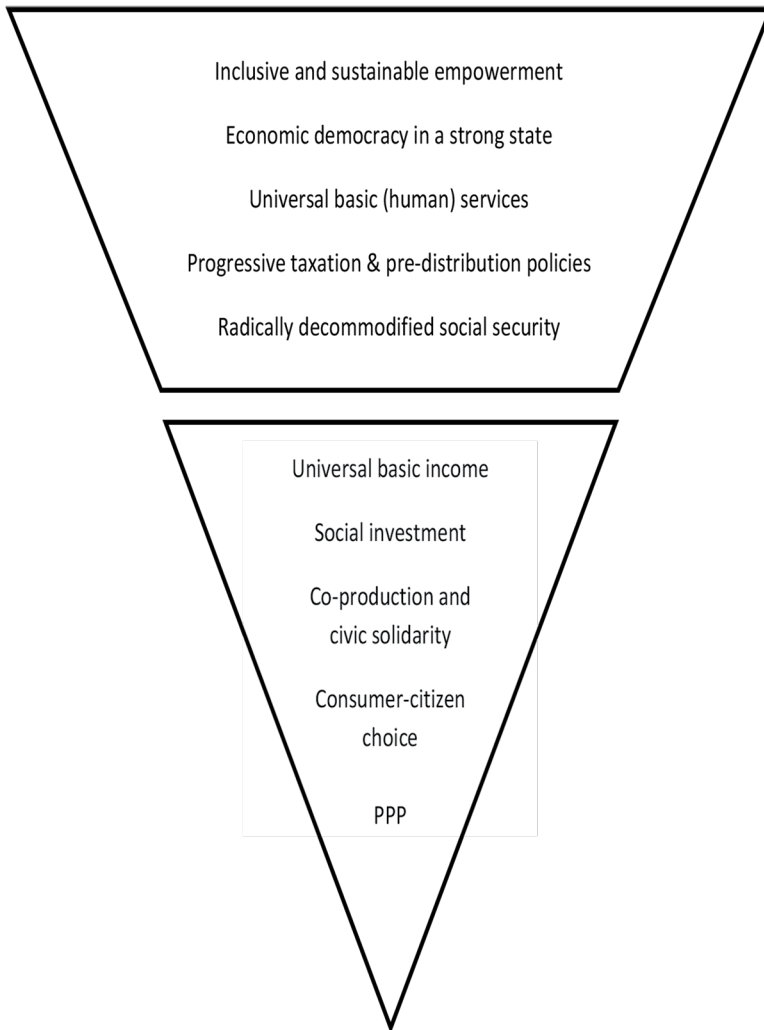
## 18.2 TRULY PROGRESSIVE CONCEPTS, OLD AND NEW

The concepts dealt with thus far contain elements that may contribute to (re)vitalising the principles of social modernity. As noted, however, they have shortcomings that set limits to the effectiveness of these principles. In this sense, they fail to be ‘truly’ progressive. In what follows, five further concepts, which appear more promising in this particular respect, will be examined. In some ways, they resemble ‘old hat’ approaches to social modernisation, but they must be adapted to the more recent transformation of European societies. The ‘truly’ progressive concepts add to – and partially intersect with – the above ‘semi-progressive’ approaches, yet, as we shall see, the propositions presented hereafter correspond more neatly to those emancipatory values that this book considers as cornerstones of the vision of social modernity. Concomitantly, the existence of these concepts reflect the timeliness of emancipatory modern thought and signals that contemporary European societies host a rich repertory of ideas, which – while often remaining a slumbering potential – constitute solid groundwork upon which future national and international collectivities can build when seeking to ensure human progress. The preconditions for the underlying ideas to flourish are considered in Subchapter 18.3.

Figure 18.1 charts the various concepts discussed throughout this chapter in the form of an inverted pyramid, which should be read from the bottom to the top. All concepts contained in that pyramid can contribute to making social modernity thrive, but those located at the top are more ambitious and promising in this respect. Part of these propositions focus on monetary benefits whereas others are concerned with human service provision. The five concepts presented in Subchapter 18.1 are placed at the bottom of the inverted triangle, given that they have some emancipatory flavour while exhibiting characteristics that run counter to the principles of social modernity (as explained above). The elements placed in the middle of the pyramid below and above the demarcation line stand for instruments that borrow most from the ‘traditional’ stock of welfare state policies in democratic capitalism. However, between the 1980s and late 2010s, these instruments have been applied only in selective ways or have even lost ground within the landscape of organised welfare provision. As will be argued in what follows, their revival could be a way station en route to (re-)establishing socially progressive forms of organised welfare provision. Meanwhile, the two sets of arrangements on the top of the triangle indicate that innovation leaps are needed to make organised welfare provision in Europe fully conform to the vision of social modernity in the post-industrial configuration.

The first concept that can be considered as being ‘truly progressive’ in the sense above is decommodified social security. ‘In response to socially constructed states of need’ (Adler 1991: 9), modern societies have invented various devices imbued with this rationale. During the last century, these devices were developed with intentions to shield human life not only against the vicissitudes of natural forces but also against human-made disruptions, especially when the latter were caused by dynamics in the economic system. Although Western elites had introduced such devices for tactical reasons, a major driving force was people’s interest in long-term security which became interlocked with the idea that institutionalised forms of social protection should be cast in ‘a contract between the individual and society’; this contract should rest on mutual commitments among the involved stakeholders and come with entitlements to ensure ‘personal independence’ and some form of social equality (Rys 2010: 2; 3). Schemes invented for these purposes constitute cornerstones in the ‘philosophy’ of social modernity.





*Note:* PPP = public–private partnerships.

*Figure 18.1 The inverted social modernity pyramid*

In many parts of the Western world, the term ‘social security’ denotes income replacement schemes covering a large range of life situations, basically illness, impairment, a special (family) care burden, unemployment and old age. The term has also been used to baptise concrete institutions, for instance the public pension fund in the US or the state-regulated set of social insurance schemes in France and Belgium. Elsewhere, ‘national insurance’ schemes fulfil similar roles. The mission of these schemes consists of securing income streams and reliable social protection during life events that are not under the control of individual benefi-

ciaries. In essence, this is accomplished by means of institutionalised guarantees that markets are unable to provide. Social security schemes are funded by payroll contributions or taxes and address waged workers with the aim of replacing a loss of income under specific conditions (concerning contribution periods, the sum of contributions paid, the reasons for income loss, etc.). The form of this conditionality can vary greatly. Besides national citizenship, typical conditions include having been in (but losing) gainful employment, showing readiness to look for a suitable job, or having paid into a scheme for a long time while being employed and wage-dependent. Importantly, social security programmes may embrace non-contributory elements related to pre-defined life situations (e.g., being a student or a young jobseeker, a lone parent, a disabled older person, etc.). In Western Europe, some programmes de facto address the entire population, by covering (part of the) costs for the protection of non-waged beneficiaries, notably in areas such as healthcare and long-term care. Thus, social security schemes can go beyond actuarial insurance models and the conditionality attached to them (see Blank 2020, for the case of Germany). As shown earlier in this book, the conditionality endemic to contemporary income replacement schemes can be very high, urging beneficiaries to accept all kinds of activities proposed by public bureaucracies. In this case, social security offers a reduced level of what is referred to as decommodification by the welfare state literature. According to a classic definition, a life situation is decommodified ‘when a person can maintain a livelihood without reliance on the market’ (Esping-Andersen 1990: 21–2) and, by extension, without abiding by pressures from (more) powerful market actors. Institutional regulation here may include things other than benefit-related provisions, for instance, protective labour law and ensuring ‘in-work decommodification’ (Pintelon 2012: 8; 5), for example in terms of working hours. To be sure, European welfare states have never offered a complete protection for salaried workers against corporate power and market forces, even as the degree of decommodification has always varied between welfare regimes. The fact remains that major regulatory frameworks reviewed in this book are predicated on the idea of making life choices partially independent from what may be required from a wage-dependent worker (for instance, accepting a job far away from home). Such frameworks organise ‘social security’ in the sense that employees, when (temporarily) unable to work, can (roughly) maintain the standard of living achieved prior to this inability. Concerning full-time employees and countries with a limited mean variation of wages, most benefits paid revolve around the median salary, minus a certain deduction. On paper, the ‘service’ element of social security – that is, medical and social care as well as health-related rehabilitation and advice to jobseekers – is equal for all. The financial burden is shared among enrollees (and employers in many cases) according to a pay-as-you go formula. Whereas the aforementioned ‘service’ element often involves strong redistributive dynamics, the distribution logic is more proportional in the case of cash benefits, given that payment levels depend on previous earnings and pay-roll contributions. Obviously, the quality of such social security is a dependent variable of the income distribution across the wider society. Even with low conditionality, the level of income replacement can be very modest once it is calculated on previously earned wages which may be extremely humble. At the same time, social security schemes can – and do, or have done, in some jurisdictions – comprise both a minimum floor and upper caps which provide for some degree of redistribution among scheme members.

When organised in this more egalitarian way, social security schemes chime well with two of the principles contained in the vision of social modernity. First, they incarnate the value

of social justice, derived from the idea that society should honour human effort regardless of (current) market values, and secondly, they express a collective commitment to provide unconditional collective support to people faced by exceptional hardship (e.g., illness, invalidity), which corresponds to the idea of human dignity. It holds true that such schemes tend to delimit the degree of solidarity by providing benefits contingent on previous contributions and for limited periods. Accordingly, in these arrangements, norms that imply a respect for human effort are complemented by a meritocratic rationale according to which high-income earners should receive more generous benefits. This hints at ambiguity concerning the role of social justice norms. While social security entitlements commonly are inalienable personal rights, much depends on how human needs are constructed and which conditions apply. Thus, where established, minimum benefit floors make insurees feel 'secure' insofar as brutal social deprivation due to 'bad luck' on the labour market is ruled out. However, to ensure a more radical form of de-commodification, future social security schemes would have to be more inclusive than many of those established from the late nineteenth century onwards. Reforms may be inspired by temporary amendments made during the twentieth century, expanding the range of beneficiaries or decoupling contributions and benefits to some extent. Overall, the degree of de-commodification inculcated into a given social security scheme is a critical factor. To conform to the third principle of social modernity – which calls for arrangements enabling (considerate) self-direction – a 'truly' progressive social security scheme must be lenient concerning the conditionality of cash transfers. For instance, such a scheme would either pay benefits that enable the unemployed to seek a new job in line with personal aspirations and previous work conditions, or offer beneficiaries (with their consent) paid training opportunities conducive to a new occupation. Disabled citizens would be entitled to receive payments that cover all costs occasioned by a given health condition, regardless of whether expenses arise in the private sphere or there are requirements for adaptations in a workplace. The precise terms of de-commodification would have to be agreed among all stakeholders and pay credit to the social rather than individual reasons behind most human hardship. This is anything but trivial, given that, in contemporary Western societies, non-individual reasons are widely acknowledged when it comes to health issues whereas adversities encountered in the labour market are more easily attributed to factors relating to individual behaviour. However, any individualisation of social risks collides with emancipatory modern values insofar as most of these adversities emanate from supra-individual processes. This is notwithstanding the mitigating influence of personal taste and human will, for instance the readiness to accept changes in one's life course and to engage with an unknown future.

Having said all this, options for both self-direction and the respect of human work are inextricably associated with the level of primary income received by a given citizen. In contemporary European societies, social inequality within the working population is largely determined by the distribution of pre-tax (and pre-payroll contribution) revenue within the wider economy (including the public and non-profit sector). Hence progressive taxation and pre-distribution policies embody a second variety of 'truly' progressive concepts according to the approach defended in this chapter. In a sense, the two instruments form communicating vessels when it comes to allocating societal resources to the different strata of a given (national) community. Taxation is an important vehicle of policy-making as it permits both the redistribution of private wealth and funding for public institutions under conditions of democratic capitalism. For the sake of social modernisation, many of the above concepts for welfare reform, like any

socially balanced agreement on creating and maintaining public institutions, require a system of progressive taxation. Various instruments are available for this, for instance, inheritance and (net) wealth tax, levies on financial market transactions or taxes on high market income. Given the strong rise of social inequality during the last decades, bold fiscal reforms using such instruments appear indispensable to enabling human progress in the years to come (Piketty et al. 2022).

However, as taxes are widely unpopular in the Western world and provoke a political discourse that often mystifies the nature and background of ‘real’ social struggles, pre-distribution policies are a promising add-on. Pre-distribution is a versatile notion that became popular during the 2010s as a reaction to soaring inequalities throughout the Western world (Diamond et al. 2015; Saraceno 2019; O’Neill 2020). The term addresses a range of welfare state activities that go beyond providing public benefits, such as acts of financial and corporate regulation, public intervention into infrastructural sectors (housing, energy markets, transport), or legal rules in the field of industrial relations (affecting the bargaining power of workers and trade unions). Mandatory minimum wages are a further instrument, although they must connect with a strong system of collective bargaining to avoid the outcome that ever-greater sections of the workforce are shifted to the bottom of the wage scale. Basically, the pre-distribution agenda seeks to deal with the root causes of social inequality rather than combating it *ex-post* and at the expense of ‘average’ taxpayers. As with decommodification, the insight that distributional norms are socially constructed is fundamental here (for an early formulation of this observation, see Wootton 1955). Orthodox economists tend to argue that, within capitalist economies, the level of wages depends on demand-and-supply dynamics, that is, arcane rules of the marketplace. However, sociological wisdom tells us that these dynamics are embedded in pre-established social structures, meaning that wages are partially influenced by values attached to: occupations and educational trajectories, wealth used to influence others (e.g., by lobbying and advertising), or the power of making decisions on working conditions. Markets are often shaped by such influences. With regard to contemporary welfare sectors, it springs into view that the value assigned to certain occupations is derived from deep-seated normative (and gendered) orientations, which becomes obvious when considering the low status of care work in many parts of Europe. Awareness of such mechanisms is thoroughly modern and a major reference point for those who argue that, in order to organise a fair(er) share of wealth, complex societies need public interventions based on democratic deliberation in order to pay credit to principles of social justice. In the context of capitalistic institutions, pre-distribution policies work by demarcating corridors for rewards that people retain from a given economic activity. Besides creating a guaranteed revenue floor, they aim at establishing a more compressed income distribution throughout the wider society and avoid market forces generating too much disruption in the flow of revenues. Once these policies manage to rearrange the allocation of primary income, they reduce the need for interpersonal redistribution through welfare benefit schemes, concerning, for instance, retirement provision, in-work benefits or unemployment compensation. A ‘pre-distributive market design’ (Saraceno 2019: 39) would also include generous standards of employment protection – as long as firms are in good shape – and provide limits to the flexible use of human labour by employers. It may also encompass efforts to ensure that workers can defend their interests with little economic risk. Finally, pre-distribution policies are expected to entail better access to public services (O’Neill 2020: 66–8). In some way, this orientation resembles the concept of social investment (see

above), given that it implies efforts to boost service sectors deemed relevant to the production of human capital. However, social investment concepts are hardly interested in interfering with the flow of primary income – and, unlike the pre-distribution agenda, they do not tackle the concentration of capital and wealth in the hands of economic elites, in order to provide the working population with greater power resources.

That said, this last element of the pre-distribution approach chimes well with a third concept, which one might consider as ‘truly progressive’, namely the idea of universal basic services (Gough 2019). This concept stands for publicly regulated activities that help people maintain or redevelop capabilities to conduct their lives in a self-directed manner and under conditions of human dignity, whatever their personal background. Hence it accords well with key principles of social modernity. Aimed at enabling all citizens to fully participate in the wider society, such activities are basic in the sense of being ‘essential and sufficient rather than minimal’ and universal, with services being delivered ‘regardless of ability to pay’ for them (ibid: 534). The public delivery of such services can be regarded as a ‘social wage’ or ‘social guarantee’ that is awarded to all citizens regardless of their ‘market value’ (Coote 2022). Besides classical public amenities, the range of the respective benefits in kind can be large and may include services needed to run a private household, to raise children (including those faced with developmental impediments), to cater for chronic health conditions or to look after incapacitated people. In Nordic countries, several of these services have been available for a considerable time now, despite some budget cuts in some places. Elsewhere, the respective infrastructure appears rather incomplete, given the experience of waiting lists, co-payments or lack of sustainable support. Universal public services are meant to guarantee the ‘basics’ of modern human life, such as ‘security in childhood’ and the establishment or maintenance of equilibrated ‘primary relationships’ (Gough 2019: 355) – which also applies to frail elderly people who, despite some progress, still receive a limited amount of personal care in most European jurisdictions (see Chapter 9). This includes a ban on arrangements through which services are delivered by ‘third parties’ unable – or unwilling – to supply services in an effective manner, either because providers are concerned with making money or due to insufficient funding. While the concept of universal basic services places the emphasis on collective responsibility for ensuring ‘life’s essentials’ (Coote 2022: 229), state ownership of service facilities may not be a ‘must’. However, public oversight to enforce obligations in the general interest is viewed to be indispensable, as are initiatives to overcome the fragmentation of extant service systems, as well as disparities in terms of access options and quality outcomes. The key rationale consists of ‘pooling resources, sharing risks, and investing collectively – through government institutions – in social and material infrastructure’ (ibid). Again, the nature and scope of the services would have to be agreed by all stakeholders, which implies the (re)invention of certain forms of democratic governance, rather than putting all trust in abundant state bureaucracies (Büchs 2021; Quinn 2022). In settings where personal interaction is fundamental to the process of service provision, professional discretion needs to be preserved since effective social support is largely contingent on individual casework that is sensitive to evolving life situations. A shared commitment to universal basic services requires investment in facilities and (wo)manpower – including for users whose human capital is unlikely to boost a nation’s material wealth. All this would have to build on a public management model that differs markedly from practices established in the early twenty-first century. This new model would feature a resource base evolving with observed needs, bureaucratic control centring

on equal treatment and the preservation of social rights, and accountability systems that give a voice to both users and workers. Concerning the interface between regulators and service providers, it would also instigate an open dialogue about outcomes that is free of fear and acknowledges the limitations of numeric performance evaluation.

In general, a welfare state architecture in tune with the vision of social modernity presupposes both a powerful public administration and ‘a well-developed civil society where multiple stakeholder groups have significant input into economic decision-making across strategic sectors especially (e.g., health, social care, ..., education)’ (Cumbers et al. 2020: 688). In other words, social modernity builds on economic democracy in a strong state – which brings us to a fourth ‘truly’ progressive concept for ensuring human progress in twenty-first century Western Europe. Concerning the role of the state writ large, European societies have recently seen a growing interest in direct public intervention, that is, activities that go beyond taxing and funding welfare benefits or human service provision. After many years of privatisation and lean administration, recent mega-events, such as the financial crisis of the late 2000s or the Covid-19 pandemic between 2020 and 2022, seem to have prompted a shift away from the idea of a mere regulatory state that confines itself to setting rules for independent (market) actors. Claims for a ‘return of the state’ (Konzelmann et al. 2021, dealing with Britain) address, among other things, the wider infrastructure for organised welfare provision. True, it would be misleading to argue that the state was absent from the organisational settlement of European welfare states during the last decades. Drawing on tax money and legal prerogatives, public authorities orchestrated welfare arrangements in many respects, and in some instances, the state became ever more intrusive, for example by imposing conditions for eligibility to access social support (see above). Proponents of a new intervention state, however, want public authorities to interfere with economic processes in a larger way. They also focus on the role of public organisations within the wider welfare state infrastructure and, more generally, on strengthening emancipatory orientations therein. What is sought for is an increased public investment into, and control of, services of general interest. A case in point is the ‘re-municipalisation’ of health and social care facilities (Paul and Cumbers 2023, referring to Germany).

Indeed, the re-visioning of social modernity cannot work without reconsidering the role of the state as an active player in society. Fostering this role of public entities would set limits to idiosyncratic agency deployed by profit-seeking organisations in various welfare sectors. However, enlarged state ownership and public investment alone will not suffice to promote human progress in accordance with the vision of social modernity. The wider debate about the rise of ‘state capitalism’ in some world regions, as well as nationalistic policies under the influence of right-wing parties that re-emphasise certain monitoring functions of the state, indicate that giving more power to public organisations is not inherently progressive (Kurlantzick 2016; Nölke 2017; Alami and Dixon 2020; van Apeldoorn and de Graaff 2022). Notably, in the recent past, many state-controlled corporations, while remaining publicly owned, were often transformed into market-oriented businesses (Plank 2020: 52f). Public sector agencies, after having widely been perceived as ‘aloof’ bureaucracies during the post-war decades, began to apply instruments and strategies that resembled those of their private sector counterparts, with this prompting an unequal treatment of users in some instances. Given this experience, state-owned agencies should be developed into a ‘new civic bureaucracy’ (Quinn 2022) based on a governance model giving a voice not only to users but also to street level agents and committed professionals. This would strengthen a welfare organisation’s capacity for adapting

practices to situations encountered out in the field, through deploying what has been coined ‘conservative praxis’ in this book.

Moreover, in order to ensure that state intervention aligns with public values, including those contained in the vision of social modernity, the systematic involvement of citizen groups in the design and implementation of welfare programmes appears useful. That said, soliciting ‘ordinary’ (lay) people to participate in the technocratic management of a given welfare sector has serious limitations, among which are their availability and level of knowledge. Regarding activities of the state, economic democracy requires effective forms of user representation within those bodies that are responsible for overseeing social support systems. Councils and boards open to public interest groups (for instance health-watch organisations, lobbies for disabled people, parent associations) could serve as public forums in which relevant issues are discussed from time to time. To some extent, such forums have been established in previous times, yet their functions were often diluted after the advent of NPM. Among other things, such civic ‘oversight’ of public sector action also lends itself to reducing the risk of idiosyncratic agency within the realm of state bureaucracies. When considering the infrastructure of current welfare states in Western Europe, non-state organisations can ensure various forms of ‘popular engagement’, including via an ‘involvement in more institutionalised practices’ (Evers and von Essen 2019: 2). Drawing on their distinctive expertise, they may even contribute to the ‘co-creation’ of new approaches in the realm of human service provision (Ansell and Torfing 2021). Once they have access to some secure core funding, civic boards are prone to raise stakeholder perspectives in direct and constant ways. Civil society and community organisations may also (continue to) run special or mainstream human services, provided they employ skilled professionals and are committed to addressing a wider range of users on behalf of public authorities. Importantly, this function requires organisational stability and robustness, which would be best achieved by long-term public mandates and a constant flow of resources. Avoiding both permanent economic pressures and command-and-control relationships between state and non-state providers, this partnership would lay the ground for the deployment of what has been termed a welfare organisation’s ‘transformative agency’ in this book. This does by no means exclude provisions that make these organisations accountable to the wider public, for instance, via reporting routines or a formal obligation to revise activities if deemed necessary by relevant stakeholders.

The concept of economic democracy goes even further and challenges the current social organisation of democratic capitalism. This leads us to a more utopian set of ideas geared towards tackling the ‘democratic paradox’ (Malleon 2014: XIII) of Western societies. This paradox resides in the fact that, within these societies, an important part of social life is (more or less) detached from extant arenas for democratic decision-making. In fact, non-state organisations are governed either by small elites (owners, managers) or – in the case of voluntary associations – by representatives of enrolled members. In both cases, the organisations’ workforce remains excluded. Concerning the realm of organised welfare provision, this is most salient in service-delivering private sector firms. More generally, the above paradox affects the task environment of welfare organisations, given that many social problems are produced or exacerbated by capitalist firms free from democratic control. Classic solutions to the above paradox – tried out to some extent in parts of Europe – include procedures for co-determination as well as employee representation by local shop stewards, work councils, and so on, which all have a potential to improve both opportunities for personal self-direction

and the respect of human work. However, given the ‘weakness of existing collectivist forms of economic democracy’ (Cumbers et al. 2020: 682) in the post-industrial configuration, more ambitious initiatives may be needed. Beyond the extension of the above procedures, economic democracy can also be fostered by creating a ‘deliberative public sphere where economic ideas and narratives become the subject of debate’ (ibid: 687). The concept then refers to the macro-level of collective decision-making where big issues are at stake – and have a bearing on the nature and scale of those needs to which welfare organisations must respond. At this level, ‘social partners’ (representatives of employees and employers), but also (other) public interest organisations, could be involved in designing economic and public policies at round tables or in big forums organised by the national government (see Malleson 2014, chapter 4.2). Issues to deal with in these arenas could comprise public budgeting, legal market regulation and a control of large-scale investment, including by huge private sector firms. The respective agreements may also have direct implications for organised welfare provision, for instance when it comes to regulating financial markets and long-term saving arrangements meant to facilitate a safer old age. Importantly, concerns of social groups that are often sidestepped in classic processes of public opinion building should receive particular attention – for instance, the issue of un(der)paid care work, the interests of students and pupils, or problems of (frail) elderly people. A further vehicle of economic democracy is consumer protection schemes with strong feedback loops (Bostan et al. 2010).

However, to provide any citizen with opportunities for (considerate) self-direction, all these procedures and institutions would be insufficient insofar as democratic participation presupposes capabilities which, considering the social fabric of twenty-first century Western Europe, are not equally distributed throughout the wider population. As mentioned earlier in this book, the bulk of contemporary civil society organisations exhibit a strong bias towards activists who are rooted in the academic middle class; and some are on good terms with the economic elites. More generally, the social stratification inherent in post-industrial societies, as well as exacerbated movements of segregation affecting the above fabric, suggest that, in order to achieve human progress in tune with the principles of social modernity, these societies must make extra efforts to establish emancipatory structures throughout. Apart from classic social benefits or mainstream human service provision, they need bold welfare arrangements geared towards inclusive and sustainable empowerment. These arrangements embody a fifth approach to making social modernity thrive in more substantial ways. When using the term empowerment, we – once again – are dealing with a versatile notion (Perkins and Zimmerman 1995; Martínez et al. 2017; Moro 2021). Empowerment works through activities that help people gain ‘control ... over their own lives in their life contexts’ (Martínez et al. 2017: 408). Critical theory suggests that the powerless often accept distressful social situations because they lack information or have internalised a culture of silence. Therefore, they need external support to develop attitudes and capacities that make them more independent from oppressive forces (Marston and Davidson 2020). Such support is geared towards letting people discover what is in their best interest and how to transform available resources into means of personal self-direction. Consequently, welfare arrangements following this rationale must be inclusive in a twofold sense. On the one hand, they should provide the disadvantaged with revenues at a level not too far from the average wealth of all citizens belonging to a given (national) community – given that extended democratic involvement is unrealistic in a context of strong and persistent social inequality. On the other hand, citizens become included in this community



only if they have sufficient cultural capital at their disposal. Ultimately, they need ‘capability for democratic participation’ (Bonvin and Laruffa 2021: 74) which comprises a feeling of substantive individual freedom to contribute to balanced agreements in a given community. Drawing on ideas of the Indian philosopher and economist Amartya Sen (1993), one can argue that social policies promote inclusive societies only to the extent that they ‘score’ on both dimensions. Related activities should be sustainable in the sense of being available across various social spheres and not only episodically (for instance in people’s early years or during transitions in the educational system). Understood in this way, empowerment is about creating institutionalised forms of social intervention through which the powerless either overcome extant impediments (‘handicaps’) or can process these in ways allowing for (considerate) individual autonomy and human dignity, without consideration of their ‘market value’. Obviously, the educational system is a pivotal place for instilling such capabilities into people, and given this system’s highly segmented character in advanced Western societies, progressive policies must address this sphere in the first place. However, the related agenda must go further and extend to work organisations, for instance by creating better opportunities for self-directed life-long learning and new rights to (freely chosen) ‘supported employment’ (Frøyland et al. 2019: 317–20).

Modern societies have invented a specialised form of intervention which can have more direct empowerment effects, that is, social work. Often conceived of as an instrument to contain ‘anti-social’ behaviour and make citizens conform to mainstream norms, activities run under this label (can) nonetheless play an important role in empowering disadvantaged citizens (see the contributions to Payne and Reith-Hall 2019). That said, the sheer quantity of human distress, material deprivation, social exclusion and risks of personal disruption in twenty-first century Western Europe all call for bold efforts when it comes to accompanying and working with citizens, broadly speaking, in trouble. Hence, to make social modernity thrive, a ‘new deal’ for social work is needed internationally, with additional resources put into forms of interactive support that are sensitive to the wider contexts of a given situation of misery, blend practical help and therapeutic intervention, and engage with ‘gap mending’ (Beresford 2019: 96) when communicating with social administration and the wider public sphere. Given the dynamics of social marginalisation and the strong pressures on lower-class citizens in the post-industrial configuration, interventions should, wherever possible, be organised as ‘embedded’ social work, that is, a set of activities run in ‘normal life’ contexts, for instance in early education institutions, schools, youth clubs, settings for domestic support to ‘stressed’ families, healthcare organisations, services to the frail elderly and also in ordinary firms. Such action might then become ‘a leading participant in the creation of a new economic and social order’ (Jordan 2021: 79). In many instances, it would go beyond current welfare state missions, with related efforts being persevering and long-term, even after recognising missed opportunities, in order to leave no one behind. Moreover, to give power to this empowerment machine, the organisational settlement of the social work endeavour – like any kind of organised welfare provision – must be freed from managerialist thinking. Enhanced space is needed for astute street-level discretion and experimental innovation without economic threats. Also sought for is an accountability model based on an open dialogue between regulators and providers so as to enable a meaningful use of realistic sources of evidence. In the encounter with target groups, enacting punitive actions would be confined to borderline cases, with the general rule being supportive interaction with users performed on a level playing

field. Furthermore, any intervention would follow a ‘zero-tolerance’ rationale concerning dynamics of social marginalisation. As activities would be undertaken whatever someone’s past or future contribution to economic wealth, such an empowerment agenda goes much further than the social investment concept, even though it shares with the latter the idea of enabling human development on a greater scale.

Thinking this agenda through thoroughly to the end, inclusive and sustainable empowerment would need to entail measures to reorganise contemporary social life in more radical ways. For example, with a decreasing availability of ‘underclass’ workers in the wider economy, European societies would have to rethink the current share of the ‘care burden’ and the handling of ‘dirty’ work tasks, for instance in private households. They would also need to find novel ways to make a much greater quantity of citizens’ benefit from ‘quality work’ by reducing the number of ‘lousy’ jobs. Among other things, this calls for a change in the mindset of upper- and middle-class citizens who, for instance, may have to accept cleaning their homes themselves – provided they are in good shape – or to reduce online shopping activities in order to restrict the quantity of delivery jobs, which could then be intermittent work performed by high school and university students, for instance. As for old and new forms of manufacturing and agricultural work, strong efforts would be needed to render them less burdensome (as long as such work is unavoidable). Job enrichment for those at the bottom of the social ladder would be a permanent policy agenda, and better-skilled employees might have to accept some tasks they hitherto used to (or are obliged to) delegate to subordinate workers. All this certainly presents a challenging mission and goes far beyond the realm of organised welfare provision – but this arena would have to be addressed if the aim consists of forging arrangements that make life (more) decent for all, guaranteeing human dignity and promoting social justice.

To be sure, within the confines of this book, the various concepts delineated thus far cannot be spelled out in greater details, concerning, for instance, further technicalities, potential caveats or necessary safeguards. Moreover, the sample of concepts should not be understood as a coherent package for renovating systems of organised welfare provision. While some of the concepts overlap and can be combined, this package also contains elements that, at a certain point, are mutually exclusive. In addition, some elements fit one national situation better than another. More generally, many of the above concepts challenge the established social and economic order of Western societies, as they are predicated on profound shifts in how collectivities at national or even international level organise themselves to (re-)invent socially balanced solutions for living together. All in all, there is no easy way from the here and now to a world in better harmony with the principles of social modernity – but this should not prevent us from examining the hurdles and signposts ahead on this path.

### 18.3 BARRIERS TO ADDRESS – AND PRECONDITIONS FOR SOCIALLY PROGRESSIVE CHANGE

Overall, this book must retain a low profile in charting a possible future for Western societies and the prospects for ground-breaking change towards conditions that correspond to the vision of social modernity in more comprehensive ways. That said, the analysis thus far suggests that, in the new millennium, much of what is contained in that vision remains feasible not only in technical terms, but also in light of entrenched ideational foundations and available concepts for welfare reform. In this sense, the account provided in this monograph is intended to be ‘realistic’. This final part of the book presents a few reflections about the opportunity structure for such concepts to flourish in the years to come, especially those that have been labelled as ‘truly’ progressive. These reflections should incorporate insights into those economic, political and cultural developments that, during the last decades, have occurred on the ‘backstage’ of organised welfare provision and can be understood as a sounding board for any welfare reform. Bearing these developments in mind, the analysis below provides some clues in relation to capturing both the most essential barriers that currently exist with respect to social modernisation and the preconditions for such modernisation proceeding in a more holistic and less bifurcated manner.

Barriers for implementing such concepts are obvious, given the processes of dismantlement, disorganisation and dissociation that have been depicted above. Indeed, shifts in political authority, the advent of managerialist technologies and the spread of ‘personalised’ solidarities seem to prevent the project of social modernity from shining brighter. Engaging with the evolving cultural political economy of contemporary European welfare states appears useful to elucidate basic mechanisms behind these processes. As for economic dynamics, those endemic to capitalism (Glyn 2006) – although losing momentum in the years after 2010 – have left deep traces in the institutional set-up of these welfare states, given the transformation of major regulatory devices developed during their ‘golden age’. While this ‘golden age’ was far from being a paradise, it seems that the post-industrial configuration, taking shape from the 1990s onwards, exhibits a less ‘conciliatory’ economic environment for social policies in tune with the principles of social modernity. Typical manifestations of this include a reduced share of wages in the overall distribution of primary incomes and fiscal reforms that have reduced the ‘tax load’ for the rich. The corridor for social redistribution has thus been narrowed down, which runs counter to the spirit of most of the progressive policies portrayed above. Moreover, in the new millennium, major welfare programmes and organisations are infused with the logics of the market and private business, which implies procedural barriers to emancipatory welfare arrangements (as described above).

Such restrictions do not fall from heaven. Rather, politics and the architecture of civil society play an important role for social development. A major factor here is the ‘distributive structure of prospects for political influence’ (Offe 1972: 76) – and, as argued earlier, Western Europe has seen much change in this respect over the last decades. Those sections of the population that have traditionally backed the expansion of classical welfare programmes appear less influential in contemporary politics, at least when comparing the situation in the early 2020s with that which prevailed in the late 1960s and 1970s. Internationally, different factors have combined to produce this trend. As discussed above, capital owners have found

new opportunities for bringing their interests to bear, for instance by strategies reinforcing the fragmentation of the workforce, anti-labour policies or pressures on the public sector to out-source various activities. In this vein, capitalist firms have also won a stake in various welfare sectors, as witnessed by the international rise of private sector provision in the area of health and social care for instance. As argued by many public policy scholars (see e.g., Heyes 2019), a major catalyst for all this to occur was the pervasive discourse on the globalised economy, evoking the (alleged) cross-border mobility of private capital and deterring welfare state stakeholders from claiming reforms that would have a potential to contain corporate power. The discursive production of anxiety is an important factor here (Betzelt and Bode 2017). In this context, the social forces that might support the instigation of universal public services, bold efforts to empower the disadvantaged, as well as policies to extend economic democracy are ailing. In this context, past welfare reforms have entailed a 're-commodification' of both work and private life (Dukelow 2021), with differences of degree between European jurisdictions. Pitting individuals against each other in one way or another, these reforms had complex implications in terms of social divisions. Under conditions of re-commodification, those compelled to accept poor quality jobs must comply with the constraints of what Azmanova (2020: 157) refers to as 'precarity capitalism'. The more protected part of the post-industrial workforce appears less vulnerable in this respect, but numerous employees in the private sector are subject to extensive pressures to deliver promptly, break even with tight budgets or outperform competitors. Other social groups, such as 'mainstream' pensioners or informal caregivers, are affected by the above trends in more indirect ways – for instance through increased poverty risk or the detrimental effect of imposed work flexibility on the capacity of accomplishing care work – and therefore have other worries. Against this background, large-scale collective action to defend common social rights has become more difficult to organise.

That said, socio-cultural dynamics come into play as well. First of all, in advanced Western welfare states, particularistic orientations among the wider citizenry tend to complicate societal agreements on how to achieve a fair deal for all. On the one hand, they provide fertile ground for the proliferation of the managerialist technologies in relevant organisational settings of twenty-first century welfare states, given a growing belief in 'market solutions' and numeric rationalism. On the other, they feed into novel social divisions that impact on policy processes. Thus, regarding contemporary European citizens on an average income, the collectivistic nature of socially inclusive and redistributive welfare systems often clashes with a feeling of being a 'net contributor' to these systems. In their voting behaviour, part of this group is guided by (narrow) self-interest in an 'achievement-performance model' in the sense of Titmuss (1974: 30–2), according to which welfare entitlements reflect a beneficiary's (past) performance and productivity (see also Pierson 1994). Concomitantly, exacerbated competition for publicly distributed resources has fuelled claims to penalise the poor and to withdraw social benefits from 'strangers' (see below). Attitudes of this kind are particularly prevalent among low-income earners keen to distinguish themselves from socially excluded populations (Hofmann 2016). Simultaneously, wealthier segments of the citizenry frequently oppose universal social rights, led by ambitions to defend their own prerogatives. Western European countries have come to display a positive correlation between a person's income level and scepticism regarding the utility of welfare state institutions (with the exception of Scandinavia, see Kevins et al. 2019). The academic middle class, which has been rapidly growing in Western societies, seems to show limited interest in traditional welfare programmes, at least

when considering the importance attached to other political issues (Gethin et al. 2022). While being sympathetic to an expansion of certain public services, citizens rooted in this milieu have often accepted, or even welcomed, market-oriented welfare reform turning them into ‘citizen-consumers’.

Importantly, these trends are intermingled with complex adjustments in the social fabric of twenty-first century European societies. Thus, educational expansion has accelerated over the last decades, yet current cohorts must fight hard to find and keep prestigious and well-paid jobs in a context in which the corridors for social ascent have narrowed overall – notwithstanding the enhanced permeability of labour markets for some groups of the working population (e.g., better-skilled females). Wider sections of the (academic) middle class feel inclined to participate in tough competitive races for attractive positions in the job market, thus defending values of economic liberalism. Such dynamics side with more diversified disparities that took shape after the transition to the post-industrial configuration and make themselves felt with, for instance, less uniform private life-worlds, poor informal support from family members due to the latter’s increased geographical mobility or the (partial) decoupling of educational achievements and personal income. Throughout middle-class households in particular, life concepts have become increasingly diverse, not just with regard to family and gender issues. In part, this coincides with strong(er) desires for social distinction (Reckwitz 2021). The understanding of what constitutes personal freedom has ‘turned increasingly individualistic’ internationally, whereas the idea that self-direction is widely predicated on collective institutions ‘rarely finds consensus any longer’ (Stråth and Wagner 2017: 193). Indeed, higher levels of individualism may imply less support for welfare state responsibility (Toikko and Rantanen 2020). This accords well with the transformation of civil society as portrayed in Chapter 6. Interest groups and social movements that are frequently dominated by middle- (and upper-) class citizens in twenty-first century Europe rarely liaise around social policy objectives related to the life situation of ‘ordinary’ people. The agenda of ‘identity politics’ (see above) remains an important driving force here.

Cultural tensions also arise from divergent attitudes towards social minorities. Such tensions have become extremely virulent in recent times, giving rise to authoritarian anti-establishment movements and what is widely referred to as right-wing populism. Apparently, growing ethnic diversity has become a strong vector of political conflict in many countries. Wider sections of both the traditional middle-class and lower-class (precarious) labour force show negative attitudes towards ‘strangers’ such as refugees and immigrants from the Global South. In part, this trend is intertwined with ‘separatist’ dynamics, given that some groups of immigrants have been found to form distinctive communities shaped by tightly knit networks of kinship and co-ethnic relationships (see Saggar 2021). At the same time, numerous immigrants (especially more recent cohorts) live under exceptional social conditions – for instance, a dirty work environment, involvement in tiny, unprofitable businesses, informal employment – all unfamiliar to the bulk of European-born citizens. In most parts of Western Europe, immigrants constitute the majority of the ‘post-industrial underclass’, but even those non-native inhabitants higher up the social ladder are often viewed as outsiders by part of the local population. ‘Welfare chauvinism’ (see Kros and Coenders 2019), that is, open reluctance of the native population to share national resources with members of these communities, appears widespread. Interlaced with ‘metaphysical’ values invoking ‘the nation’ or the alleged virtues of a given ethnicity (white, Christianised people), these orientations ignite conflicts about welfare expenditure on

‘foreign’ people instead of ‘fellow’ citizens. Such symbolic distinction is anything but new, yet it has become more salient in many Western welfare states in the new millennium. Related attitudes are infused with anxieties concerning the rapid change and diversification of cultural habits, as well as technological innovation, which is often perceived as being overwhelming. Referred to as cultural backlash (see Chapter 1 and Subchapter 2.1), this movement has prompted the formation of new political bonds (Gethin et al. 2022) as, in many European countries, traditional upper middle-class voters have formed a *de facto*-alliance with ‘native’ citizens from lower strata to back right-wing populists – which results in intricate political constellations and a structural weakness of ‘truly’ progressive political forces.

In sum, considering all the (economic, political and cultural) dynamics underway in contemporary Europe, it is tempting to assume that most of the ‘truly’ progressive concepts for developing modern welfare arrangements (further) would not attract sufficient political support. The values that undergird major arrangements of organised welfare provision seem to have become less influential, even as many stakeholders of these arrangements tend to distrust the universalistic promise inherent in extant public institutions. Moreover, important sections of the European population stick to meritocratic norms which, at least partially, sit uneasily with the principles of social modernity. Others set non-material priorities, be it as a voter or in order to further their life’s plans. Nowadays, even among those sympathetic to socially progressive welfare programmes, a majority is unwilling to invest in collective action amenable to (more radical) policy change, in part because it does not feel as being part of a larger ‘community of fate’. Strong political alliances advocating for more radical welfare reforms – for instance, economic democracy challenging corporate power, free universal basic services, enhanced vertical income redistribution to expand emancipatory welfare programmes – are out of sight. Hence, initiatives breaking with the prevailing policy logics are ridden with prerequisites, to say the least.

Will the vision of social modernity crumble into dust then? It may come as a surprise, yet the overarching message of this book is that this vision does nonetheless have a future. Indeed, from a critical realist perspective, the existence of the previously mentioned stumbling stones does not exclude developments through which ideas inherent in that vision become revitalised. A good indicator of this is the actuality of the very principles of social modernity, despite many years of neoliberal ‘rule’ across large parts of Western Europe. As argued above, recent history suggests that, in many respects, these institutions and organisations have remained impregnated with these principles. Thus, relevant sections of the waged workforce can be assumed to share a common interest in decommodified social security and to subscribe to core values such as human dignity and social justice regardless of what the logic of the market implies. More generally, the fact that modern societies continue to breed concepts for policies in tune with these values is indicative of the ‘energy’ contained in the above vision. Key elements of that vision have remained ingrained in the cultural DNA of Western Europe and constantly impact upon the latter’s history – notwithstanding the fact that they have been declared outmoded so many times.

Therefore, it seems worthwhile to reflect upon the conditions under which the barriers identified above could be overcome and ponder which might be fertile preconditions for progressive welfare state change in our times. One special aspect to consider, even though it goes beyond a mere social-scientific reflection, is the issue of costs and economic dynamics more broadly. It holds true that the most vigorous objection against the concepts sketched

above would be the lack of (public) money. Indeed, most of these concepts require resources which would have to be levied on primary income and profits in one way or another. In this debate, it should not be forgotten that, over the last decades, the distribution of societal resources has become more unequal internationally, with capital owners and economic elites having increased their share in substantial ways (see van der Hoeven 2023). Regardless of the moral side of this development, macro-economic arguments in favour of reversing this trend may convince larger segments of the European population at some point. In recent times, heterodox economic thinking that endorses social redistribution has received greater attention internationally. It implies that, with a greater proportion of socialised money, consumption patterns would necessarily change, given that citizens who benefit from such redistribution have special priorities – yet this money would not be lost. Rather, income set free by this might be used to fund special types of services (for instance, professional care) at the expense of other outlays (e.g., for big cars). The result would be a different economic circuit, rather than economic decay. True, taxpayers or workers making payroll contributions are often expected to oppose such shifts (in some countries more than in others), driven by a widespread worry according to which higher taxes and enhanced social redistribution may motivate ‘rich’ income earners to invest money abroad rather than at home. That said, options for shifting capital from a national (or pan-European) economy to other places in the world (including tax havens) result from political decisions, hence much depends on social representations concerning these issues. These representations can change, however. Thus, to some extent, the upswing of anti-globalist orientations internationally can be read as a vote for taking back control over the above transactions.

More generally, the history of democratic capitalism has seen various stages of worker-friendly legislation on welfare issues, and once put in place, such legislation has shown a potential to weaken the hegemony of economic elites, given that it encourages people to resist the ‘laws’ of capitalism to some extent. Socioeconomic dynamics can help here. For example, change in the supply–demand ratio for salaried labour, that is, a shortage of workers in important industries, can trigger shifts of power to the benefit of wage-dependent people, as illustrated by international trends in the early 2020s. Apart from this, under the conditions of democratic capitalism, attitudes towards state regulation are largely influenced by public debates. It holds true that a good deal of the mass media in contemporary Western Europe is owned and influenced by higher income groups, which provides the elites with ample opportunities for disseminating arguments against progressive social policies. The built-in ‘power play’ is more complex, however. Apart from the fact that the media landscape is not monolithic (which also applies to the new social media), the echo that the economic arguments find in the wider public is crucial. Elites in European welfare states have often felt a need to comply with expectations running counter to their short-term interests, given the threat of hostile reactions if they fail to do so, such as consumer boycotts, industrial action or mediated public protest. Thus, the orthodox Marxist verdict, according to which powerful capitalists stymie human progress in all instances, underestimates both the intricacies of politics and the historical windows of opportunity for propagating socially progressive concepts for welfare reform. As social power and political authority in modern society have discursive foundations that can be challenged by the sense- and meaning-making of citizens (including lower-ranking groups), the key question is about how relevant constituencies think about opportunities and constraints when it comes to forging welfare agreements. In terms of critical theory or concepts of cul-

tural political economy, this perspective on political dynamics implies adopting a Gramscian perspective on institutional change (Brighenti 2019), meaning a reflection on the interplay of social representations outside the realm of the ruling elites, on the one hand, and the dynamics in the regulation of economic power, on the other.

A reflection about conditions that enable the blossoming of the principles of social modernity under democratic capitalism must start from here and pay attention to two overarching factors: processes of historical learning on the one hand, and evolving belief systems, on the other. In this line of thinking, progressive reforms would require, first, certain forms of historical learning, meaning a collective rediscovery of critical prerequisites of social modernisation in the past. According to Sum and Jessop, who looked at the evolving social organisation of capitalism, people living in modern societies make use of imaginaries that can ‘lead to learning based on ... successive experiences’ (Sum and Jessop 2013: 170, drawing on Rupert), even though there is a need to periodically refresh these experiences, including those pertaining to settled social agreements. Regarding the development of democratic capitalism, institutionalisation from above has been one of these experiences. The recent history is replete with examples of this mechanism causing human progress, including when it comes to organised welfare provision. Throughout Western Europe, the statutory enactment of welfare arrangements and state responsibility for overseeing them have been key vectors of social development. However, publicly regulated welfare arrangements have become taken for granted during the second half of the twentieth century, and it seems that their historical background has been fading from the collective memory of European nations. To some extent, the recent Covid-19 pandemic has turned the page again, as it has yielded strong commitments to protecting vulnerable citizens by institutional means. In this instance, European societies have (re)discovered the virtues of a strong public sector, despite the hegemonic mantra according to which capitalistic economies are less dynamic with a greater involvement of the state.

The issue of state involvement deserves some more attention. In the recent past, public bureaucracies have often been seen as a place for ‘idiosyncratic agency’ (see Part IV of this book), exhibiting low productivity when compared with capitalist businesses. Related experience is difficult to ignore. In part, however, the performance gap between private firms and the public sector is often due to both extended worker rights in this sector (concerning social protection standards and space to resist pressures from employers) and different requirements in terms of democratic accountability. Contemporary public organisations are not necessarily ‘lame ducks’, as examples from advanced European countries show (Grönroos 2019). In addition, an extension of their role – which is inherent in some of the ‘truly’ progressive concepts for welfare reform delineated above – may grease the economic machinery of these countries, given that these concepts boost its human capital base or the infrastructure needed to make a post-industrial economy work smoothly. Bearing this in mind, twenty-first century European societies may be prepared to accept potential ‘collateral damage’ of bold state intervention (in terms of inefficiencies or time lags) once citizens (re)gain deeper insights into both the overall functionality of such intervention and the distinctive preconditions for public (sector) organisations to provide collective benefits.

Historical learning for human progress is relevant at yet another level of collective action. Indeed, a further historical precondition for socially progressive policies to thrive has been pressure from below, meaning organised interaction by citizens with a stake in welfare policies attuned to the vision of social modernity (Steinert and Pilgram 2003; Vaz et al. 2022). As



already noted, Western democracy is anything but equilibrated concerning people's access to mass media conveying political messages and to the public debate more generally. However, the history of democratic capitalism in Europe has shown that the polity can be led to consider claims of tenacious social movements, particularly when these movements morph into well-organised political or non-profit associations. The past is rife with examples of welfare state stakeholders – such as disabled people, care workers or (future) pensioners – speaking up to claim government action that institutes, consolidates or extends social rights. In many European countries, public interest groups defending disadvantaged or poorer sections of the population have managed to take a stance in the political sphere, at least temporarily. When rediscovering available opportunities, involved activists can easily find allies in the wider society. Thus, typical welfare sectors are composed of agencies and professionals with a vested interest in developing welfare programmes and facilities. As substantiated in this book, the 'makers' of welfare often perform roles that go beyond the mere execution of public mandates. Many of them are employed by non-profit organisations pursuing a social mission; others work for public agencies imbued with professional ethos. Once all these social forces gather around common agendas – for instance a better deal for both care workers and care recipients – and achieve a critical mass, the voices raised have a good chance to find an echo in the polity. Such agendas may also be carried forward by broader inter-organisational networks whose initiatives may be taken to scale at critical junctures of welfare state development.

Importantly, given the capitalistic organisation of the Western European economy, it is hard to imagine that socially progressive welfare reforms can be launched without a revival or consolidation of trade unionism. To achieve human progress, strong unions alone are no panacea, yet they can be a strong factor when it comes to ensuring the building of equitable welfare arrangements, including for retirees. No doubt, in twenty-first century welfare states, the conditions of waged labour continue to be largely influenced by how workers are represented in their encounter with employers, concerning both opportunities for collective bargaining and power positions in the workplace. True, strong unions may come with the risk of closed shops, meaning that groups of workers exclude others to defend their particular(istic) interests. Historically, industrial relations regimes have differed concerning the proclivity of labour organisations to embark on this model. In many instances, however, the European labour movement of the twentieth century defended more inclusive welfare (state) arrangements. Some trade unions have even become specialists in relation to social security institutions, most prominently in countries in which they participate in the latter's management. True, internationally, the political and economic power of unions is lower than in earlier periods of democratic capitalism. Although the early 2020s have seen some more ambitious attempts to embark on industrial action (again), a high proportion of workers remain uncovered by collective agreements even as numerous private companies have withdrawn from employer associations. Learning processes are crucial here as well. Some European countries have seen initiatives to build 'inclusive unions' (again) (Durazzi 2017) which seek to be (more) responsive to precarious workers, the traditionally non-unionised occupations (e.g., female care professionals), and lower status groups more generally. In recent years, some unions in Europe have also paid greater attention to the situation of lower-class workers by claiming lump-sum wage increases and embarking on industrial action to achieve this goal. Given the fissuring of workplaces and corporate strategies of union busting in various economic sectors, new approaches to developing the rank-and-file base may invert the long-term tendency of

membership decline. Grassroots organising campaigns have recently been one of the preferred options. Organisational forms that go beyond shop floor representation or the attachment to one sole industry may be equally helpful. Unions can even turn into schools for social solidarity (Rosetti 2019) once they constitute an open forum in which members discuss common concerns across organisational and sectoral boundaries. This may be facilitated by ‘labor-civic networks’ (Lee 2016, for the case of Asia) in which unions liaise and exchange viewpoints with other civil society organisations, for instance professional associations and public interest groups advocating for the concerns of marginalised populations.

Apart from these processes of historical learning, a second overarching precondition for socially progressive welfare reform to flourish is evolving belief systems among larger sections of the European population, providing dynamics of social modernisation with an innovative impetus. Related trends may emanate from the above learning processes but may also be rooted in other dynamics of social change. This assertion, which is part and parcel of a cultural political economy perspective (Sum and Jessop 2013), follows from the observation that regulatory ideas are made hegemonic and can become discredited at certain stages of social development. Under conditions of democratic capitalism, changing mindsets across various social milieus may open new routes to social modernisation, and this holds in various respects. To begin with, those movements of disorganisation and dissociation that have been portrayed above are deeply ingrained in the rationalistic culture of advanced modern societies but often sit uneasily with preconditions for socially progressive welfare reform. The firm belief in routines of rationalistic management – which is widespread at least among the better-educated segments of the contemporary European population – is often incompatible with concepts that seek to empower disadvantaged, care-dependent or ‘troubled’ citizens in a sustainable manner. Accordingly, to become effective, the implementation of ‘truly’ progressive concepts would require that overly rationalistic forms of steering work organisations in welfare sectors and elsewhere – that is, the mantra of managerialist governance – become discredited and are replaced by more lenient approaches that organise emergent organisational praxis in more coherent ways, for instance by institutionalised forms of professional supervision or more systematic routines for collegial decision-making. This ‘mind-shift’ would also have to address the encounter of regulators and welfare organisations, to open space for more interactive forms of accountability and eye-to-eye exchange on evaluative evidence. Importantly, this would require both enhanced trust in the ‘makers’ of welfare and a ‘briefing’ of regulators to make them acknowledge the limits of the governance models established during the heyday of NPM. Among other things, a more equilibrated dialogue about organisational performance involving various stakeholders could attract support from professional milieus of various welfare sectors, as well as from numerous service users or patients. Concerning regulation in this spirit, much depends on those middle-class sections which, in the recent past, have often welcomed a more consumerist and market-oriented governance in various welfare sectors. Understanding the downsides of NPM-driven forms of service delivery, some might be led to put greater faith in a mode of public governance which, rather than exposing stakeholders to anonymous and often uncontrollable (quasi-)market dynamics, (re)establishes more holistic (non-numeric) forms of accountability and a long-term interface with public or not-for-profit provider organisations.

An innovative impetus to extant belief systems might be essential in further respects as well. Recent times have seen a new type of ‘moral individualism’ among economic elites and

occupational groups in their ambit (clerk managers, creative professionals, leading figures in politics and higher education, etc.). The related discourse, epitomised by the buzzword of ‘social responsibility’, comprises ‘voluntary’ commitments to respect human dignity and development goals aligning with the international human rights agenda. Admittedly, there are good reasons to distrust the promises of this ‘woke capitalism’ (Rhodes 2022), and it is questionable whether many profit-seeking corporations will walk the talk. That said, the invoked imaginaries may form a new reference basis that both public policies and civil society organisations can draw upon when addressing the behaviour of economic elites and trends in public regulation. More generally, the repercussions of related ‘moral approaches’ are contingent on the further development of ‘post-material’ attitudes throughout the wider population, especially the academic middle class. While, in recent times, such attitudes had a rather individualistic imprint and were often antagonistic to the collectivistic elements inherent in the vision of social modernity, modern individualism does not necessarily exclude commitments to more institutionalised forms of social solidarity (Achterberg et al. 2013). People seeking to develop and demonstrate their own tastes and lifestyles may, nonetheless, be interested in whether fellow-citizens enjoy the same opportunities – which, under certain conditions, could be a door opener to (re)new(ed) collectivistic welfare arrangements. Indeed, in-depth studies into the mindset of contemporary Europeans reveal patterns of what Taylor-Gooby et al. (2019b, for the case of the UK) refer to as a reluctant individualism, that is, an often-fatalistic acceptance of private responsibility for welfare provision. The current lack of enthusiasm for the extension of public effort, it is observed here, connects with the perceived absence of ideas concerning ‘collective approaches to social issues’, alongside perceptions ‘that state welfare faces major challenges’ and that, under these conditions, ‘individual responsibility in some areas is the only way forward’ (ibid: 109–10). At the same time, the growing support for the public enforcement of human rights – including those that may benefit communities far away from home (in the Global South) – signals widespread commitments to collective responsibility for the well-being of fellow citizens. These commitments may grow stronger once people discover the potential of socially progressive welfare reforms for empowering all citizens to build a self-directed life course, especially when hit by human hardship. The relatively strong – though not unanimous – international support for the concept of universal basic income suggests that many younger citizens in Western Europe endorse this kind of reasoning (Vlandas 2021). Also, experience with the Covid-19 pandemic may facilitate the development of commitments to more collective welfare arrangements, including among the better-educated sections of the middle class which have partially approved the dismantlement of welfare state institutions in the recent past (see above). This may align with the cognitive re-appropriation of the collective foundations of individual freedom – in the labour market, in shaping a life course, concerning the access to public services – alongside an enhanced sensibility for the concerns of ‘underclass’ citizens for whom the range of such freedom proves to be particularly narrow in current times. This spirit may also spill over to the sphere of industrial relations. Many workers in contemporary Europe, even when they are sympathetic to the defence of social rights, grapple with paying contributions to unions or accepting the line hierarchy endemic to modern mass organisations. The much-debated model of selective incentives (that is, certain frills or wage increases reserved for affiliates) has a potential to increase membership rates but risks instilling a consumerist attitude into a union’s rank and file. Indeed, labour organisations can fail to meet extant expectations; moreover, consumerist members may not

be willing to support long-term and large-scale political projects. However, if larger sections of the population came to acknowledge the civic character of union action spanning various topics and covering all types of workers, there might be a higher chance for the enforcement of public policies that provide institutionalised support to member organisations in this realm. This support could include public core funding or more ambitious initiatives for making sectoral collective agreements binding for entire industries through statutory bargaining extensions that are common (albeit contested) in some European countries (see Paster et al. 2020).

Finally, changes in current belief systems are crucial when it comes to social divisions along the lines of cultural identity. As argued above, negative attitudes towards both immigrants and ethnic diversity undermine collective initiatives for launching more universalistic welfare programmes in contemporary Western Europe. The proliferation of ethnically diverse communities has spawned distrust among populations worldwide (Putnam 2007: 147, referring to the US), even as the imaginary of multiculturalism – while being internalised by well-educated supporters of the ‘Brahmin left’ (Gethin et al. 2022) – deters many lower-educated citizens on a subpar income from voting for socially progressive political parties. With a growing ‘polarization on the sociocultural axis of political conflict’ since the 1970s (ibid: 30), broader alliances endorsing universalistic welfare reforms are unlikely to occur in the near future. That said, political sympathies with right-wing populism, although they often twin with a narrow understanding of personal self-direction, do not imply a rejection of all principles of social modernity as such. Ironically, in some parts of Europe, the upswing of right-wing movements has been propelled by perceptions that these principles have been infringed by public policies (Churi 2022). To be sure, the proliferation of ‘welfare chauvinism’ among larger sections of the European population, including previously left-leaning electorates, as well as the ‘cultural backlash’ associated with it, runs counter to fundamental Enlightenment ideas, given the underlying propensity to exclude people from access to public institutions. Nevertheless, while identity issues are often deep-seated and coincide with a limited ‘cognitive’ openness to cultural diversity, economic and political contexts matter. As Kymlicka noted a while ago, the heyday of progressive neoliberalism in the 2000s and 2010s was impregnated by a political discourse that admonished citizens ‘to better respect migrants and minorities’ while simultaneously proclaiming a need ‘to gut their social protection schemes’ – which implied that ‘the meaning of “equality” was being reduced’ (Kymlicka 2015: 7). Concomitantly, to some extent, the spread of chauvinistic orientations seems to be contingent on perceived economic threats (Kros and Coenders 2019). They are also accommodated by public policies that elicit feelings of anxiety by curtailing programmes providing for social security (Betzelt and Bode 2017). However, when threats are discarded, cultural divisions might become less virulent. The same effect could arise from shared insights into the limits of ‘identity politics’, with their middle-class stakeholders acknowledging that established forms of positive (or affirmative) action might find greater acceptance in the wider society should public policies on the whole become more sensitive to social impediments under post-industrial conditions. As for ‘native’ Europeans feeling uncomfortable with immigration, tensions might decrease with the experience that extant fears emanate from configurable factors, for instance the political governance of labour markets. People may also realise that once ethnic (and other) majorities invest in the same institutions as the ‘native’ population does, they contribute to the creation or cultivation of a common heritage. This can feed into what Kymlicka (2015) has termed ‘multicultural national solidarity’, that is, a political resource in battles for progressive welfare reform. Over

time, there are good chances of post-industrial societies ‘becoming comfortable with diversity’ (Putnam 2007: 159), especially when ethnic minorities have firmly settled within a given nation-state (which is also suggested by international research on the coexistence of religious communities, see Ramos et al. 2019). Thus, Western Europe could see ‘a reconstruction of diversity that does not bleach out ethnic specificities, but creates overarching identities’ (Putnam 2007: 164). This process may be endorsed by educational expansion, given that support for right-wing populism seems to correlate negatively with the attained level of education (Gethin et al. 2022). The fallout would be transcended identity boundaries in the social fabric of twenty-first century Europe.

A key question for the near future of organised welfare provision is whether current European societies can give birth to a ‘redistributive political coalition’ (Abou-Chadi and Hix 2021: 72) in tune with the principles of social modernity. It may take a long time until pro-welfare sentiments of ‘backlash’ groups merge with the universalistic orientations held by a good deal of better-educated citizens on a decent income – but this is not unthinkable. To the extent that supporters of right-wing populists claim more comprehensive social protection, they are not yet lost from the project of social modernity. At the same time, part of the academic middle class expresses sympathies with socially progressive ideas, although it is obvious that these milieus insist on paying attention to other, non-economic agendas (climate change etc.) as well. Middle-class citizens may also develop new perspectives on the public organisation of welfare arrangements writ large. Importantly, some social trends inherent in the post-industrial configuration might facilitate the formation of the above coalitions, given that – notwithstanding the previously mentioned (new) divisions – Western European societies have seen new commonalities among groups from different milieus (see Chapter 5). This includes a common experience of status insecurity across social classes or a widely shared frustration arising from the dismantlement of employment protection or pension schemes. Similarly, the cultural mass industry, while distracting people from ‘real’ problems in many instances, has come to make media recipients share experiences of ‘innocent victims’ of public neglect (poor children, frail elderly people) and increases the likelihood of collective outrage across social class boundaries.

In a nutshell, the fate of social modernity is unclear, yet there is no reason to trumpet the end of history. From the perspective of what has been referred to above as diagnostic realism, it is crucial that some commitments contained in the ‘truly’ progressive concepts as discussed above are ingrained in the cultural heritage of modern Europe. Although public policies often only pay lip service to these commitments, the imaginary of social security, the promise of human dignity for those hit by life accidents, and the respect of individual autonomy have remained relevant to welfare arrangements in many twenty-first century nation states – and to some extent, this imaginary has even sustained initiatives to amend such arrangements. While many countries have seen setbacks over the last decades, distinctive processes of historical learning and altered belief systems may become game changers, due to mechanisms located at different layers of the cultural political economy of advanced Western societies – such as new approaches to organising dissimilar groups of workers, a mind-shift in the growing social stratum of the academic middle class and, even among the elites, a growing awareness of the perverse effects of market-oriented meritocracy, along with a more ‘realistic’ acknowledgement of non-individual factors in the building of productive human capital.

Admittedly, human progress cannot be fully conceived of without adopting a global perspective. This begs the question as to how (far) social modernity in Europe can and will inspire social modernisation elsewhere in the world. The theory section of this book has contained succinct reflections concerning this issue, arguing that Western Europe – while having been the cradle of colonialism and maintaining a widely unsustainable ‘imperial mode of living’ (Brand and Wissen 2018) – was a forerunner in developing institutionalised welfare arrangements of which some were transferred to other parts of the world. The specification of conditions under which such a spill-over could be more comprehensive and more equitable in the future is beyond the scope of this book. The fact remains that, when regarding the immense universe of organised welfare provision, our historical experience suggests that the vision of social modernity in its European version has inspired numerous social movements around the globe – which implies that insights into its fate are useful when considering options for human progress worldwide. As this vision sustains numerous socially ‘progressive’ institutions and organisations, it has never been mere utopia. True, as this book has shown, the underlying agenda has overall become more selective and bifurcated when compared with institutional designs at the end of the ‘golden age’ of Western European welfare states. For those who disbelieve in the enduring power of modern ideas, however, history may have further surprises in store.

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