

**Activating labour market policies and their impact on the welfare
triangle and gender – a tentative conceptual framework**

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Sigrid Betzelt

Research associate, PhD
Centre for Social Policy Research (CeS)
Bremen, Germany
sbetzelt@zes.uni-bremen.de
<http://www.zes.uni-bremen.de>

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Abstract:

The paper develops a conceptual framework for systematically comparing different national activation policies with regard to their implications for the welfare triangle between state-market-family. This means to examine *first*, the complex interdependencies between those institutional and cultural contexts shaping gender relations in a society, and the specific country variant of activating labour market policies, and *second*, the different outcomes of this interplay in terms of social inequality especially with regard to gender and class. More precisely, the paper discusses two main research questions: *1. How does the individualised concept of activating labour market policies influence the national patterns of welfare and gender regimes?* Hypothetically, the variance of “institutional fit” of activating policies depends on the welfare/gender regime: In rather gender egalitarian adult worker models, activating strategies should conform to existing institutions and social structures. The activation turn would not require fundamental structural change, but only gradual adaptation (e.g. case of Denmark). In strong or moderate breadwinner models, activating strategies probably produce inconsistencies with existing institutions and social structures. The activation turn would therefore either entail fundamental structural change to form a consistent political strategy, or the implementation of activation would necessarily remain fragmented and contradictory (case of Germany, UK).

2. What consequences do the nation-specific types of activation have for patterns of social inequality, esp. with regard to gender and class? The individualising activation paradigm could result in enhancing gender equality or rather impeding it, particularly with regard to two aspects: (a) *gender segregation of labour markets*: Hypothetically, activating labour market policies might help to *alleviate* gender segregation if they were accompanied by measures of “flexicurity”, securing transitions between different states of employment and non-employment, and if they entailed enabling programmes that were allocated equally between genders and social classes, thus empowering people to participate in properly paid employment and earn their living. But activation might as well *aggravate* gender segregation if such provisions were either lacking in cases of pursuing a “workfirst” approach, or if enabling measures were distributed and allocated socially unequal between genders and social classes. Such a variant would most likely result in increasing social inequalities and even social polarisation. The second critical aspect is (b) *the “care gap”*: The universal labour market availability inherent to the activation paradigm in principle raises a conflict with care needs for dependants not able to earn their living (children, frail elderly people). The typical answer to this conflict within the activation paradigm is defamilialisation and a commodification of care, i.e. to outsource informal familial care work and allocate it either to the public sector (Scandinavian model) or to the market (Anglo-saxon model). However, from a citizenship point of view, there is both a citizen’s “*right not to care*”, that is, to be free from caring obligations to be enabled to do paid work, but also the “*right to care*”, that is, to participate in familial care work and receive social recognition in the currency of time and subsistence rights. Therefore, the question arises, (how) *do the different types of ALMP address these conflicts between the “right not to care” and the “right to care”, and what are their implications for the social citizenship of men and women, notably fathers and mothers?* Of particular interest here are the regulations of work obligations for persons with caring responsibilities, the degree of (de-) commodification of care work, and the more or less gender equal practice of implementing activating policies.

The paper proposes an analytical framework to operationalise these questions in a theoretical context of ‘social citizenship’ and recent typologies of activation policies. It then draws conclusions from a case study of German activation policies in which this analytical framework was used. These are briefly discussed in the light of some other comparative data.

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I. Introduction

The widespread European paradigm shift to “activating” labour market policies as a core part of welfare state restructuring is based on the concept of the individual adult worker model, the (re-) commodification of every adult worker citizen which is supposed to enhance employment growth and reduce unemployment rates. However, despite such a seemingly universal political strategy of “activation”, research has revealed that there are different national patterns of “activating” labour market policies (ALMP), influenced by and embedded in the respective institutional settings of welfare state regimes, producing different outcomes (Barbier and Ludwig-Mayerhofer 2004; Andersen and Guillemard 2005; Larsen, J. E. 2005; Clegg 2007; Serrano Pascual 2007; van Berkel and Valkenburg 2007). What has also been reflected so far, though not too often and not exhaustively, is the influence of the activation paradigm on gender relations and in particular on changing responsibilities for informal care work within different national settings (Knijn and Ostner 2002; Lewis 2002; Siim 2005; Skevik 2005; Saraceno 2007). This issue is highly relevant as the activation idea affects the classical triangle of welfare production between state–market–family: The degree of availability of women, notably mothers, for the labour market is first of all a dependent variable of institutional arrangements around informal care work in the family, including available care infrastructure, fiscal incentives and benefits for families etc., strongly influenced by cultural norms of gender relations and family values.¹ The individualised concept of activation should therefore have a considerable impact on these arrangements. Moreover, according to these nation-specific patterns, the starting points for ALMP were quite different throughout Europe. There is a wide variety of gender regimes², ranging from an already more or less realised adult worker model with dual full-time earners and mainly publicly organised caring (e.g. Denmark), to strong or moderate breadwinner models of a male full-time earner and a female part-time earner and carer, among them different sub-types depending on the role of the State and the market respectively (e.g. France, UK, Germany). However, what seems to be a still underdeveloped field of research are, *first*, the quite complex *interdependencies* between those institutional and cultural contexts shaping gender relations in a society and the specific country variant of activating labour market policies, and, *second*, the different *outcomes* of this interplay in terms of social inequality

¹ Of course, individual preferences do play a role too for decisions relevant to labour market participation (cf. (Hakim 1998; Ostner 2004) but are very much framed and structured by institutional, economic and cultural environments.

² The theoretical concept of gender regimes was developed by feminist comparative welfare state research, critically referring to Esping-Andersen’s welfare regime typology (Lewis 1992; Orloff 1993; Sainsbury 1999). These early conceptualisations have been continuously refined to much more complex theoretical constructs which include various dimensions of policies, culture and social practices, usable for multilevel analyses (Pascall and Lewis 2004; Pascall and Kwak 2005; Walby et al. 2007). A short definition of this complex concept of gender regimes is given by Heather MacRae: „*Gender regime*’ refers to a set of norms, values, policies, principles and laws that inform and influence gender relations in a given polity (...). A gender regime is constructed and supported by a wide range of policy issues and influenced by various structures and agents, each of whom is in turn influenced by its own historical context and path.” (MacRae 2006): 524-525). For a short overview in German language see (Betzelt 2007).

especially with regard to gender and class. The paper attempts to tackle these issues, dealing with *two main research questions*, formulating already some first hypotheses:

1. *How does the individualised concept of “activating” labour market policies influence the national patterns of welfare and gender regimes and vice versa?*

Presumably, trends of commodification and de-familialisation induced by the “activation turn” shift responsibilities from the State to the market, and from the family to the individual – but will such a convergent shift hold true against different national starting points and path-dependencies? Hypothetically, the variance of “institutional fit” of ALMP depends on the welfare/gender regime:

- In rather *gender egalitarian adult worker models*, activating strategies should *conform* to existing institutions and social structures. The “activation turn” would not require fundamental structural change, but only gradual adaptation. This could be assumed for universalist welfare state types like Denmark or Sweden.
- In *strong or moderate breadwinner models*, activating strategies should produce *inconsistencies* with existing institutions, social structure and social practices. The “activation turn” would therefore either entail fundamental structural change to form a consistent political strategy, or the implementation of “activation” would necessarily remain fragmented and contradictory. Such constellations could be assumed for the case of Germany and the UK, with differing roles of the State and the market respectively.

Turning the research perspective around, what are the *consequences* of these different social and political constellations for the *specific activation type* of each country, its consistency and the interplay of “activating” labour market policies with interrelated fields like family policy? We will come back to this question and further hypotheses on the relation between gender regimes and activation types in the theoretical part II of this paper.

2. *What consequences do the nation-specific types of “activation” have for patterns of social inequality, esp. with regard to gender and class?*

The individualising activation paradigm could have gender equalising effects on the one hand, but on the other, there are some severe reasons for scepticism:

a) *Gender segregation of labour markets:*

In most industrialised countries, labour markets are horizontally and vertically gender segregated with regard to the distribution of occupations, pay, working hours, career prospects, social security etc.. The question is here, whether ALMP aggravate or alleviate these gender segregations (and other social inequalities). Hypothetically, ALMP might help to *alleviate* gender segregation if they were accompanied by measures of “flexicurity”, securing transitions between different states of employment and non-employment, and if they entailed ‘enabling’ programmes

equally allocated between genders and social classes, thus empowering people to participate in properly paid employment and earn their living.³ But activation might as well *aggravate* gender segregation if such provisions were either lacking in cases of pursuing a “workfirst” approach, or if ALMP were distributed and allocated socially unequal between genders and social classes. Such a variant would most likely result in increasing social inequalities and even social polarisation.

b) “Care gap”:

The “activating” paradigm means that the complete commodification of all adults able to work is required. This universal labour market availability raises a conflict with care needs for dependants not able to earn their living (children, frail elderly people). The typical answer to this conflict within the “activation paradigm” is defamilialisation and a commodification of care, i.e. to outsource informal familial care work and allocate it either to the public sector (Scandinavian model) or to the market (Anglo-saxon model). However, as the feminist strand of the debate on social citizenship has pointed out, this seemingly “simple” answer is neither satisfying nor even practicable (see part II): From an inclusive citizenship point of view, there is both the citizens’ “*right not to care*”, that is, to be free from caring obligations and thus enabled to do paid work – for women and notably mothers not fully realised in most societies – , and the “*right to care*”, that is, to be de-commodified to some extent in order to participate in familial care work and receive social recognition in the currency of time and subsistence rights. The awareness for the latter right takes account of the impossibility – and social undesirability – to completely commodify care work (Lewis 2002; Saraceno 2007). Between these two social rights and the entailed individual earning and caring responsibilities is a certain tension which should be resolved by finding an acceptable balance between both spheres of socially necessary work, thus aiming at a socially inclusive version of citizenship (Hobson and Lister 2002; Lister 2007). This target also raises the issue of an equal distribution of the remaining “uncommodifiable” care work at the household level. Now, the “puzzle” in our discussion here is, (*how*) *do the different types of ALMP address these conflicts between the “right not to care” and the “right to care”*, and what are their *implications* for the social citizenship of men and women, notably fathers and mothers? Of particular interest here are the regulations of work obligations for persons with caring responsibilities, the degree of (de-) commodification of care work, and the more or less gender equal practice of implementing ALMP.

To sum up, the issues tackled in this paper are twofold: On the one hand, the activation paradigm with its one-dimensional employment-centred path to social integration causes problems as it does not meet the requirements of families and the society on the whole, ignoring uncommodifiable social needs and other than employment related paths to social cohesion. On the other hand, it is highly questionable whether activation strategies actually contribute to equal

³ We refer to the normative concept behind this hypothesis later in part II.

opportunities of labour market participation for all individuals which would require to take account of different individual needs and to counteract labour market inequalities, or whether they rather prolong or even enforce such inequalities due to selective practices (Crespo Suárez and Serrano Pascual 2007). The answers to these questions will result in very different evaluations of activation policies with respect to their implications for social cohesion and the gender regimes of societies.

With regard to the Call for Paper to this Conference, the paper thus addresses both the *methodological question* of how to assess the success and failure of “activation”, distinguishing between genders and the earning-caring roles in society, and the question of the *outcomes* of activation policies regarding gender and class segregations and the target groups of “activation”. Far beyond attempting to answer these complex questions here, the paper first pinpoints the posed issues within a theoretical context around the discourse on social citizenship (part II), before proposing a tentative analytical framework to research these questions comparatively (part III). In the fourth part of the paper, we draw some conclusions from a case study on the German “activation” type in which this analytical framework has been applied, summarising first empirical results of contextualised evaluation studies and labour market statistics.⁴ Instead of the originally planned truly comparative study which was not yet possible due to missing gender-specific data, the findings from the German case study are then just briefly discussed in the light of some recent comparative research. However, more comparative gender sensible work on specific aspects of activation will be further developed by the author and other members of the research network “*RECWOWE – Reconciling Work and Welfare in Europe*”.⁵

II. Theoretical Context: Social Citizenship and Activation Regimes

The paper refers to the debate around the impact of ALMP upon citizenship (Barbier and Ludwig-Mayerhofer 2004; Andersen 2005; Andersen et al. 2005; Serrano Pascual 2007; van Berkel and Valkenburg 2007), employing a gender sensible perspective that takes account of the feminist strand of the debate (Lister 1997; Hobson and Lister 2002; Siim 2005; Skevik 2005; Ben-Ishai 2006; Bothfeld 2007). Two important findings within both discourses were *first*, that ALMP as a major part of welfare state restructuring is changing the relationship between the State and its citizens with significant effects on the citizen’s civil, political and particularly social rights which, however, are divergent due to different types of “activation” and welfare states,

⁴ A more detailed paper on the German case was presented at the last year’s ESPAnet Conference in Vienna (Betzelt 2007). In contrast to that paper, in the following the theoretical concept and analytical framework is further elaborated.

⁵ RECWOWE is a European Network of Excellence within the Sixth Framework Programme of the European Commission. For further information, please, visit the website: <http://recwowe.eu>. There is ongoing research on activation policies within Work Package 1 (“Flexibility and Security”), referring to institutional and social aspects like gender or longterm effects (Task 1.11, co-ordinated by the author together with Giuliano Bonoli, IDHEAP), and within Work Package 4 (“Toward Employment Friendly Welfare States”).

each referring to different political discourses and normative ideals; and *second*, that the state-citizen relationship is not gender neutral but historically has had different implications for men's and women's rights which the "activation turn" has brought back on the agenda: The individualised adult worker model inherent to the activation approach ignores the social reality of *gender inequalities* (distribution of unpaid care work, gender segregated paid work) and the impracticality and social undesirability of a complete commodification of care work (Lewis 2002). Therefore, drawing on the recent work of Skevik (2005), the impact of "activation" has to be analysed with respect to two gender relevant main aspects: (a) *the rights and obligations linked to the integration of earning-caring responsibilities*, and (b) *the right to individual autonomy*, defined as "the right to pursue one's chosen life projects, the freedom from unwanted and intrusive guidance on the 'right way to live'" (Skevik 2005: 51). The latter goes back to earlier normative measures of realized gender equality, developed by feminist comparative welfare state research, assessing the "women friendliness" of welfare states by the degree of female independence from a male breadwinner as well as from commodified labour (Crompton 1998; Sainsbury 1999). Ben-Ishai (2006) has refined this definition of autonomy by emphasising its *relational quality* that takes account of the interdependencies of all humans and the relevance of acquiring the *capacities* to lead one's own life. Ben-Ishai states that autonomy cannot be developed in isolation but only within relationships that "assist us to develop capacities for autonomy" (Ben-Ishai 2006: 23), and concludes that *appropriate social services* are necessary that enable individuals to act autonomously, which, so the author, is not possible if service delivery is characterized by relations of domination.⁶ In this sense, we refer to a normative concept of "activation" which means *to empower citizens to strengthen their autonomy by enabling them to act autonomously* and live according to their plans which *includes both earning and caring responsibilities*. The underlying notion of *reciprocity* between individual and collective responsibilities is not constrained to gainful employment but acknowledges social responsibilities such as family care work (Valkenburg 2007). It relies on a *capabilities approach* (Sen 1999; Bonvin and Farvaque 2007) that insists on the individual freedom as the relevant informational basis for public action, i.e. people's capabilities (what they actually can do and be) and choices. According to this normative framework,

"...fostering people's responsibility is achievable only if adequate means and valuable opportunities, via the implementation of collective responsibilities, are defined and supplied. This is in line with a 'forward-looking' and 'task-oriented' perspective of responsibility, rather than a 'backward-looking' or 'blame-allocating' one (Goodin 1998) (...) Implementing collective responsibility in the field of labour market policies thus implies providing jobseekers with real capability for work, that is, with real access to a valuable job (which of course does not coincide with the elimination of any form of constraint or practical limitation, but with the necessity to build the most valuable combination of individual and collective responsibility (...)" (Bonvin and Farvaque 2007).

⁶ The underlying concept of "autonomy" is discussed on the Conference in more detail by (Bothfeld 2008).

This concept of capability or empowerment goes much beyond the mainstream idea of activation aiming at “employability” (Crespo and Serrano 2007) as it does not follow a “blame-the-victim” ideology in the attempt to combat unemployment, but insists on public responsibilities for macro-economic policies. This notion of empowerment is very different from the dominant concept of “employability” used in the mainstream discourse on activation which is usually based on a narrow, economist and ultimately gender biased citizenship concept. The widespread term of “employability” ignores not only the institutional barriers that impede the development of and practical demand for individual capabilities (Gazier 2001; Promberger et al. 2008), but also leaves those capacities and orientations out of consideration that are not directly related to the labour market. Hence, this normative capabilities based concept of empowerment could be used as a yardstick or benchmark to evaluate activation policies. According to this, jobseekers should be allowed and supported to bring in their own ideas and plans of how to cope with their responsibilities, and their not market related capabilities and competences, their implicit knowledge and experience should be accounted as valuable resources and potentials to realize their plans. In the context of this paper it is moreover necessary to assess whether and to what extent “activating” and “empowering” policies are applied in a *gender sensible way*, i.e. taking account of structural differences in the situation of men and women (on the labour markets and in the domestic sphere), and whether and how *equal opportunities policies* have been implemented within the activation strategy.

To examine these questions, we particularly refer to some recent work of a group of authors that provides a promising approach to our research perspective as these authors emphasise a reciprocal view of a ‘*social contract*’⁷ as a normative ideal (Serrano Pascual and Magnusson 2007; van Berkel and Valkenburg 2007). They analyse and typologise actual political strategies of activation as well as the normative foundations of underlying social-political discourses (Valkenburg 2007), and have established a typology of “*activation regimes*” using two dimensions (Serrano Pascual 2007): The first dimension are the “*modes of managing individuals*” in activation policies. Here Amparo Serrano Pascual and her colleagues distinguish two different main types of modes, one that is directed towards the individual’s behaviour in a moral-therapeutical way, blaming the unemployed as not willing or not able to fulfill their responsibilities, and one that aims at *matching up workers to market demands* by adaptive skill-management and / or reducing labour costs, thus attempting to improve the functioning of the labour market. The second analytical dimension in this typology comprises the contents and the reciprocity of the *social contract* between the unemployed and the State, in other words the “*quid pro quo*” of the individual’s rights and duties (*quid*) and the welfare state’s obligations (*quo*) which is more or less equally balanced and moreover based on different levels of welfare

⁷ The term ‘social contract’ could suggest a balance of power between citizens and the State. However, the theoretical work we refer to is well aware of structural imbalances of power in this relationship which is analysed in their considerably different degrees within activation regimes.

state spending. As a result, five ideal types of activation regimes have been identified within this two-dimensional matrix to which the seven empirically examined national activation types could be more or less assigned: The regime types are the “*economic springboard regime*” (UK), the “*civic contractualism regime*” (Netherlands), the “*autonomous citizen regime*” (Sweden), the “*minimalist disciplinary regime*” (Czech Republic), and the “*fragmented provision regime*” (Spain). Some of the examined activation types have been classified as more or less hybrid regimes (Denmark, France, Portugal, Czech Rep.).⁸

For our discussion on the gender implications of activation types, this typology could be very fruitful. We have tried to make use of these works when elaborating a tentative analytical framework (see part III), though it would afford more systematic, comparative research to fully grasp its analytical potential for our purpose. However, what already seems to be clear so far, is a certain affinity between the ideas of an inclusive citizenship, individual autonomy and empowerment as explained above, and the type of “autonomous citizenship regime” described by Serrano Pascual and colleagues:

“This regime is typified by its focus on both individual and collective responsibility with a view to achieving self-determination. (...) While the job-finding process is still contractualised, in this case the contracts contain a significant degree of reciprocity and many things are left to the individual’s discretion. The main focus is on a training-based approach resulting in the predominance of measures geared towards investment in the workforce.” (Serrano Pascual 2007: 306).

What remains nevertheless open to further analyses is to what extent and under which conditions this activation regime allows the unemployed enough room of manoeuvre for exercising the social ‘right to care’, considering the comparatively high degree of defamilialisation in Sweden’s welfare state.

Another, for our research questions seemingly very useful analytical work refers to the normative foundations of different activation policies, namely the different *concepts of individualisation* on which activation policies are based (Valkenburg 2007). The empirically recognized broad trend towards individualisation of social policy, in particular of activation policies, is “*neither clear not unifocal (...), but an expression of various discourses*” (Valkenburg 2007: 26) which partly even contradict each other, and which lead to different consequences and hence to more or less successful activation policies. Ben Valkenburg argues that “*the most fundamental issue in this discussion is whether or not the individualisation of activation policies enables people to be in charge of their own life*” (ibid), thus referring to a quite similar normative ideal as quoted from the feminist strand of debate on social citizenship. The author then constructs a theory-based typology of these individualisation discourses and identifies five ideal types which of course are interrelated: (1) the discourse on the “*erosion of the traditional family*”,

⁸ The authors of the national case studies were Colin Lindsay (UK), Rik van Berkel (Netherlands), Flemming Larsen and Mikkel Mailand (Denmark), Eskil Wadensjö (Sweden), Jean-Claude Barbier (France), Jorge Aragon and colleagues (Spain), Pedro Hespanha (Portugal), and Tomás Sirovátka (Czech Rep.).

(2) the “*differentiation and flexibility of social and economic life*” discourse, (3) the “*privatisation and free market regulation*” discourse, (4) the “*shift in rights and duties of welfare state and citizens*” discourse, and (5) the “*growing reflexivity of individual and social life*” discourse.

While in this paper there is not the space to dwell on all these discourses, we just would like to briefly explain the fifth discourse type as it is seemingly most compatible to the idea of an inclusive, egalitarian citizenship: In this understanding, individualisation is interpreted in terms of growing reflexivity of individual and social life, as analysed and theorised by prominent authors of modernisation theory (Giddens 1990; Giddens 1991; Beck and Beck-Gernsheim 2002). This discourse acknowledges the permanent creation of new knowledge in modern society, taking place in a reciprocal process of everyday interaction in which people develop their individual identity as a ‘reflexive project’: As users as well as producers of new knowledge in different contexts, their identities are in a flow, and “*what is ‘true’ for their everyday life today may become ‘untrue’ tomorrow*” (Valkenburg 2007: 31). To take account of these modernisation processes, according to this discourse “*individualisation of activation policies means that they should link up with and do justice to the reflexive projects of individual people*” (ibid.). This discourse implies a *reciprocal, client-oriented approach* which means that citizens should be enabled to take charge also of the process of activation, requiring to take into account “*the position from which the individual starts, their daily life, their strengths and competences*” (Valkenburg 2007: 33). In consequence, this understanding implies that “*Tailoring activation policy to the differentiated and flexible life is possible only if and when the individual citizen plays an active role in this process. This active role implies that the individual should be in a position to contribute their own definitions of problems, analyses and solutions to the process.*” (ibid.; emphasis added) Such a strong position of the individual in a reciprocally defined activation process, not entailing complete freedom of action but taking charge of one’s own life, would theoretically allow to pursue present life plans and exercise the ‘right to work’ as well as the ‘right to care’ within certain defined margins between individual and collective responsibilities. As the author himself says in this respect:

“*...the conclusions in this discourse become more open-ended. From this perspective, for some mothers paid labour may contribute to their autonomy, for others it may not. In this situation mothers themselves may well have a lot to say with regard to the route that should be followed. This approach is based on the assumptions that the consequences of single parenthood are not uniform for all, but different for each individual*” (Valkenburg 2007: 40).

As this recognition of very different situations and needs of individuals who are in the same social situation is a necessary ingredient of a client-oriented approach, from a feminist point of view that considers the *structural character* of gender inequalities on labour markets as well as in the domestic sphere, such ‘purely’ individualised policies may not be sufficient: There remains nevertheless the requirement to create real options for choice to get into decent jobs by equal opportunities policies that take effect against structural disadvantages.

Now, how could this recent theoretical work of typologising activation policies – with regard to their different implicit understandings of individualisation and their different approaches towards the individual within a ‘social contract’ – be connected to the gender regime typology? In other words, what are the interdependencies of a certain activation regime with the specific normative, institutional and political patterns forming gender relations in a society? And what are the implications for social inequalities and the opportunities for an inclusive social citizenship then? Sound answers to these questions could only be given on the basis of more systematic theoretical as well as empirical comparative research. However, in the light of available findings some *first tentative hypotheses* may be permissible although they do not yet get a grip on the complexity of both regime typologies. As a first attempt, our hypotheses formulated earlier in this paper (part I) are accentuated a bit differently now:

- First, ‘conservative’ gender regimes largely based on strong or moderate breadwinner models and with a limited relevance of equal opportunities policies could be understood as not (yet) having completely realized the individualisation process of modernisation. The predominating discourse of activation is therefore less likely to refer to a growing reflexivity of individual and social life as a consequence of individualisation processes in modern societies. Hence, countries of such a profile probably have a closer affinity to those activation regimes that are more paternalistic and grant their citizens less individual autonomy, involving less reciprocity between policy process and citizens. Most likely other activation regimes than the ideal type of an “autonomous citizen regime” are established here. Rather, a combination of different discourses – like privatisation and free market regulation, a shift of rights and duties – is likely to result in inconsistent activation strategies, implemented within an institutional, political and cultural setting that contradicts the individualised activation paradigm. Fragmented and hybrid activation regimes might be the consequence. With regard to the effects on social inequalities of such activation regimes, gender inequalities would not disappear due to the existing institutional barriers impeding an equal labour market participation. The same is probably true with respect to class inequalities which might even be exacerbated due to an unbalanced ‘social contract’ towards the citizens’ duties’ side.
- Second, more universalist, egalitarian gender regimes based on the individual adult worker model clearly have realized a higher degree of individualisation, at least in the economic sphere of labour market participation, as in this regime type every citizen is in charge of their economic sustainability. It is rather obvious that such a starting point is much more compatible with the activation paradigm as such, or to put it more bluntly, the (economically) active citizen is a quasi natural precondition of these universalist welfare states (Larsen, J. E. 2005), and this normative *Leitbild* of an ‘active society’ is pursued consequently in the institutional and political settings of society. This also implies a rather reciprocal ‘social

contract' between the State and its citizens which probably results either in an "autonomous citizen regime" of activation, or – if a more moral-therapeutic regulation of individual behaviour predominates – in a "civic contractualism regime". Social stratification, being less prominent in these welfare states anyway, might be evened by this type of activation as, for example, public spending on 'enabling' policies can be supposed to be high. However, individual autonomy is first of all related to economic activity, and hence it is highly questionable whether and to what extent a status of 'inactivity', esp. due to care responsibilities, is recognized and remunerated in such regime types.

Of course, these assumptions need to be further differentiated, considering the whole scale of different dimensions of both activation regimes and gender regimes. As a first step, the next part of the paper sets out a tentative analytical framework with a number of dimensions considered as useful and necessary for further comparative research on gender and activation.

III. Activation Policies and Gender: Towards an Analytical Framework

In this section, we attempted to set up an analytical framework that allows to examine the raised research questions on the background of the presented theoretical context. It is based on earlier works of Barbier and Wolfgang Ludwig-Meyerhofer (2004) and Barbier (2005), applying rather descriptive analytical dimensions, and was furthermore fueled by the quoted recent theoretical work of Serrano and Magnusson (2007) and van Berkel and Valkenburg (2007). The following listed analytical dimensions could therefore be understood as a gender sensible extension of existing work. Listed are those analytical dimensions with respective indicators that were identified as particularly relevant for a systematic analysis of the implications of activation policies for gender relations and vice versa, while the specific gender relevance of each dimension is briefly explained, without referring to every indicator in detail here. However, the list is probably neither complete nor is its analytical value limited to gender issues.

Analytical dimensions and indicators for a gender sensible analysis of activation policies:

1. Income support

a) eligibility criteria:

- social insurance contributions (related to individual work history) or means-tested benefits

b) degree of individualisation:

- definition of neediness: related to individual or household; thresholds of allowances for household revenues (income, assets)
- where applicable: definition of "household" as the relevant unit for means-test (degree of inclusion of (step-) children, partners, relatives, other persons)

c) generosity and duration:

- basic (subsistence level) or generous level (approx. next to minimum wage)
- form of benefit: flat-rate and / or extra benefits for special needs or situations
- duration open-ended or fixed-term

These features of the income replacement system for the unemployed is relevant for a gender sensible analysis of activating policies not only to measure the general degree of de-commodification and their potential gender-specific effects – e.g. the exclusion of mostly female ‘atypical’ workers from status-related benefit systems – , but also because the eligibility criteria for cash-benefits in some welfare states (e.g. Germany) practically define the actual access to activating programmes.

2. *Mix of rights & duties (type of ‘social contract’, degree of reciprocity)*

a) *‘duties package’:*

- work obligations: universal or selective with regard to gender, age, ethnicity, personal situation (esp. care responsibilities, household context) of benefit claimants
- definition of a ‘suitable job’ with regard to skill-level, wage, mobility requirements, quality and duration of offered job/work opportunity (working hours; sustainability; social security), personal circumstances
- sanctioning infringements: degree of rigidity in legal provisions and in practice; universal or selective appliance of sanctions
- degree of administrative discretion of frontline-staff in handling the ‘duties package’

b) *‘rights package’:*

- individual entitlements to services: legal, actionable provision of service delivery or discretionary provision (of counselling, vocational training, settling-in allowances etc.)
- degree of the individual’s discretion and range of defined options (choice): involvement in the activating process according to individual preferences (within a defined range of options), e.g. in job-finding plans, Individual Action Plans
- legal provisions of rights of objection against administrative decisions; conditions for the individual to take court actions (e.g. level of law charges)

This dimension is meant to measure the balance of ‘social contracts’ and the degree of individual autonomy and choice, assessing the modes of regulation of the individuals’ behaviour. With regard to a gender sensible analysis (and also with regard to disadvantaged groups in general) it is of particular importance whether and to what extent formalised rights and entitlements of the unemployed are provided within activation policies which practically can be enforced by the individual. For if these legal provisions are lacking and ‘activating services’ are delivered only on discretionary terms, there is not only the risk of endangered citizenship due to missing individual autonomy (Barbier and Ludwig-Meyerhofer 2004), but also the risk that gender stereotypes are transported in the daily practices of interaction between frontline-staff

and clients: The practice of enforcing work obligations or sanctioning infringements does not necessarily follow formally gender-neutral legal regulations, but may be influenced by cultural gender norms that contradict the objective of gender equality. The same might be true for other stereotypical assumptions that are more based on general prejudices than on real social practice, e.g. with regard to ethnic minorities. However, it is true that legal provisions of entitlements alone would not guarantee that disadvantaged groups are actually able to exercise their rights. Legal entitlements could rather be seen as necessary, but not sufficient conditions for equal opportunities, which should be accomplished by further 'enabling' measures (see dimension 3 and 4).

3. *Equal opportunities policies, target groups and access to ALMP*

a) *equal opportunities policies* implemented in activation strategies: existence of such policies (e.g. gender quota, guidelines for frontline-staff); governance and implementation of Gender Mainstreaming; controlling

b) *access to ALMP programmes*:

- universal or selective access to 'enabling' programmes: legal provisions (eligibility criteria), incentive structures for disadvantaging groups with (supposed) low employability; differentiating programme type according to its quality (duration, training elements, labour market relevance etc.) and costs per client
- actual conditions for participating in 'enabling' programmes: timetables (part-time programmes?), extra benefits during participation (e.g. for childcare)

c) *specific programmes for target groups*

- existence and level of public spending on specific programmes for vulnerable groups like longterm unemployed, low-skilled, migrants, single parents, parents of young children, women returners on the labour market etc.
- effective participation rates of target groups in all 'enabling' programmes in relation to their respective unemployment risks; outflow from unemployment to employment (of which quality?)

d) *gender-specific data*

- sufficient gender-specific official data base on all these issues, to be delivered by public administration
- gender-specific evaluation of activation policies, to be commissioned by the government

This dimension should grasp the existence and 'degree' of more or less serious and consequent equal opportunities policies within activation regimes, as well as the specific approach towards vulnerable target groups of activation. We go into more detail of this dimension as up to now there is not much research available on this subject. – As some authors have already shown for other policy fields (Larsen, T. P. 2005), the norm of an adult worker model does by not

necessarily entail a political orientation towards equal opportunities policies, but might for example be constrained to policies aiming at the reconciliation of 'work and family', leaving aside issues like equal pay or gender segregated labour markets. The same is true for activating policies: While they are (more or less) oriented towards the adult worker norm, this does neither mean that both genders are actually *treated equally* by activation policies, for example in offering the same job opportunities or in imposing the same sanctions, nor is it self-evident that activation policies imply *proactive strategies* against structural discrimination. These would comprehend, for example, creating equal opportunities for disadvantaged groups (like mothers of young children, migrant women) by offering 'enabling' programmes that take account of personal circumstances and needs (e.g. family responsibilities). Such proactive anti-discrimination policies would also imply attempts to alleviate the gender segregation of labour markets, for example by defining a 'suitable' job in terms of adequate social security and equal pay.

Hence, to assess the existence and quality of equal opportunities policies of activation regimes both legal provisions and implementation practices must be examined at least in three respects: *First*, the question is whether and how *equal opportunities policies* have been implemented, governed and controlled: e.g. existence of gender quota of participation in 'enabling' measures of all types as related to reasonable reference parameters⁹; responsible, competent officers for gender mainstreaming in public employment services; binding equal opportunities guidelines and gender training programmes for the frontline-staff; effective controlling measures of meeting gender target lines; degree of priority for equal opportunities policies set by chief executive officers in public employment services; etc. *Second*, it has to be examined whether the *access to 'enabling' labour market measures* is universal or selective by legal provisions and in actual practice, this also includes to assess whether there are (fiscal) incentive structures for service deliverers to disadvantage social groups with (supposed) low employability; the access conditions have to be assessed for different types of measures according to their quality and costs per client. *Third*, the question is whether and to what extent there are appropriate programmes for vulnerable target groups, considering also the concrete conditions for participation which should take account of the personal circumstances and needs of these groups. The outcomes of such equal opportunities policies can be measured, for example, by the effective participation rates of women in general and specific target groups, and by the outflow from unemployment to employment, ideally considering the quality of jobs.

Of course, to examine activation policies in this broad and explicit sense affords very detailed and *gender-specific data* which often are not available. It is therefore a further gender relevant evaluation criterion whether official statistics have to deliver the appropriate data basis to

⁹ Such reference parameters may be the female share on the whole labour force, the female share of unemployment, the relative unemployment rate of women, each applying another standard of 'equal' opportunities policies.

undertake such specific analyses, and whether special gender evaluations of activation policies are commissioned by the government.

4. *Quantity and quality of “enabling” services*

- a) *government spending on labour market related personal social services* (education and training, counselling, job creation measures, settling-in allowances etc.)
- b) *duration and quality of ‘enabling’ schemes* (e.g. training elements, participation conditions), spending per client, degree of individualisation of services (tailored services by case-management or standardised service delivery)
- c) *quality and funding of personal social services delivery* not directly related to the labour market, but to social or psychological problems (childcare needs; domestic violence; drugs; debts; psychological problems; etc.): consideration of such problems in the activation process, effective support with appropriate measures or relegation of clients to other actors / service deliverers; sufficient or insufficient funding of these services (e.g. available places)
- d) *distribution of ‘enabling’ services among client groups* related to their respective unemployment risks: universal or selective distribution

This dimension concerns the type of activation regime in the sense of a more “universalist”, ‘enabling’ type, aiming at matching up the skills of the unemployed and enhancing their capabilities, or a more “workfirst” type, aiming first of all at a quick insertion into the labour market (Dingeldey 2007), which of course must be seen in the context of the “rights & duties package”, i.e. more or less client-oriented, reciprocal activation processes. With regard to gender, this dimension is highly relevant as a low level and quality of ‘enabling’ policies reproduces social inequalities and impedes upward mobility of disadvantaged groups. Apart from these directly employment related services, this dimension also includes the quality and funding of other personal social services delivered to the unemployed that concern social or individual problems. This criterion refers to a capabilities approach and asks whether activation strategies are suitable to enable people to be in charge of their own life, and whether appropriate, tailored services or only standardised measures are delivered. With regard to gender, it is particularly relevant whether and how problems of lacking appropriate childcare facilities are considered and actually resolved within the activation process. Moreover, the distribution of ‘enabling’ services among client groups – universal or selective – is also important to assess whether women in general and vulnerable groups specifically are supported in the same way as the majority and in appropriate quality. This criterion is overlapping with the fourth dimension of equal opportunities policies, however, it is broader in terms of the generally universal or selective orientation of activation policies.

5. *Matching of labour supply and demand*

- a) *micro-level*: matching of job-placements and ALMP measures with skill-levels and other personal characteristics of the unemployed
- b) *macro-level*: relevance of supply-side measures (education and training to upgrade skills) and demand-side measures (e.g. lowering labour costs by reducing social security, deregulating wage calculation and labour law)

The purpose of this dimension is, additional to the fourth dimension, to assess the profile of activation policies with regard to a more supply-side or demand-side approach in regulating labour markets. In terms of a gender sensible evaluation, this dimension attempts to grasp the effects of employment and labour market policies on the segregation of labour markets, esp. gender segregation. As indicators are relevant the quantity and quality of job creation or job placement, esp. in terms of pay and social security, and the social distribution of these jobs / work opportunities according to gender, class, ethnicity and other categories.

6. *Implementation conditions of activating policies*

- a) *governance structure*: degree of de-centralisation/devolution, degree of co-ordination or competition between operating agencies
- b) *governing principles* of implementing activating policies: predominance of social policy principles (social inclusion) or business management principles (cost-effectiveness, marketisation of services etc.)
- c) *overall funding and resources of public employment services*, caseloads of frontline-staff, skill-levels of frontline-staff

Though in most dimensions the implementation practices of policies have already been addressed, an explicit analytical dimension of the *overall implementation conditions* of activation policies are highly relevant as empirical research has shown (Serrano Pascual and Magnusson 2007; van Berkel and Valkenburg 2007). Rather than conceptualising these conditions as marginal, the implementation of policies has been recognized as the continuation of the policy making process (Hill and Hupe 2005). It is therefore very important to assess the implementation conditions as they say a lot about the actual quality of activation policies. The gender relevance of this dimension lies in the interplay of these conditions with the general profile of activation policies: The concrete conditions of funding, governance structures and operating principles often make the difference between more 'enabling' or more 'workfirst' policies, with their explained gender implications. However, due to a lack of space as well as specific expertise on governance structures, we cannot go into more detail here regarding the gender implications of particular implementation conditions. What seems to be clear so far, is that conditions allowing for tailored services – i.e. sufficient funding, manageable caseloads, skilled frontline-staff, social policy governing principles instead of business management

principles – are to be preferred with regard to a client-oriented approach enabling individual autonomy as explained in part II of this paper.

7. *Interplay of Activating Labour Market Policies with broader policy context*

- a) *institutional regulation* in different policy fields setting positive and negative incentives for the labour market participation of women and men, mothers and fathers, i.e. family policies (financial transfers, leave schemes, job guarantees for returners etc.), income taxation (e.g. income tax splitting), social security (old-age, sickness, disability)
- b) *quantitative and qualitative aspects of the market for personal social services*, esp. of childcare facilities and schooling (*quantity*: coverage rates for different age groups, *quality*: opening hours, skill-level and number of personell, price structure, vicinity to place of parental residence etc.); market structure of providers (public, private, non-profit), regional disparities of service delivery (geographical regions, urban and rural areas)

To assess the gender implications of activation policies it is important to consider the broader policy context in which these are embedded as this context sets the institutional and political conditions for the labour market participation of women and men, mothers and fathers (Dingeldey 2003). There may be positive, but also negative incentives for the labour market participation of women set in different policy fields, esp. regarding family related policies like income taxation, leave schemes and family benefits, more or less individualised social security entitlements, and last but not least the quantity and quality of the market for personal social services, esp. of childcare (indicators see above). The coherence of an activation regime very much depends on these ‘surrounding’ context factors which are largely determined by the society’s general gender regime, including family values and gender role models (Betzelt 2008; Bothfeld 2008). The profile of activation policies, their implementation, and their outcomes with regard to gender effects is much influenced by this interplay as it is either consistent or inconsistent with the activation paradigm. This again has effects for the individual citizens who may have to meet congruent or contradictory demands. The analysis of these important context conditions of activation policies is demanding as it requires to cover a range of different policy fields, and as sufficient empirical data are not always available for evaluation. The collaboration with experts in these fields, however, might offer good opportunities to resolve this problem.

Researching these seven analytical dimensions allows to draw conclusions on the effects of a certain activation type on social inequalities, in particular with regard to gender, and on the interdependencies of activation types with gender regimes. As a result, it should be possible on the one hand, to make substantial assumptions about the consistency of an activation type and its gender implications. On the other hand, the analyses could reveal whether potential changes

of a gender regime due to activation strategies may be assessed as path-breaking or not, of just incremental or rather fundamental quality, and perhaps in what future direction these changes may point. The next section summarises some tentative conclusions from empirical research on the German case of activation in which the proposed analytical framework has been used.

IV. Lessons to Learn From the German Case

The German case study was based on a gender sensible analysis of the institutional regulations of the most recent ALMP legislation, official labour market statistics and evaluation studies, using the above described analytical framework as far as data were available. The detailed results of these still preliminary gender analyses of German activation policies have been published elsewhere and will not be copied here (Betzelt 2007; Betzelt 2007; Betzelt 2008). Instead, some conclusions will be drawn with regard to the raised research questions, summarising main findings without referring to each of the seven described analytical dimensions. The case study focuses primarily on the fourth and latest piece of the German labour market reform, in Germany commonly known as “Hartz IV” reform, coming into force in January 2005.¹⁰ This limitation is justified as this law can be seen as the core of Germany’s latest activation approach¹¹, introducing a new “regime” of unemployment benefit system (Knuth 2006; Jacobi and Mohr 2007) that breaks with Bismarckian principles as it imposes a means-tested flat-rate benefit system on subsistence level to the large majority of the unemployed (about 75% of all registered unemployed).

With regard to the research questions raised in part I, the following preliminary conclusions can be drawn from the case study on Germany:¹²

1. Influence of activation policies on the welfare and gender regime, with shifting responsibilities of the state-market-family relationship:

In Germany, the paradigm change towards the Activating Welfare State obviously has been performed incompletely up to now, as comparative research has revealed (Dingeldey 2003; 2008). The adult worker norm has not been implemented consequently in all policy fields and for the whole population, considering for example the persistence of the income tax splitting system for married couples and the still quite hesitant expansion of public childcare facilities. Within activating labour market policies, we can observe only a rudimental path-breaking change of the traditional breadwinner model towards an individualised adult worker model while

¹⁰ The labour market legislation is named after the former head of the respective commission for labour market reform, Peter Hartz (then human resource manager of Volkswagen) which was appointed by the red-green government in 2002. The commission’s proposals were the basis for the subsequent four laws on “Modern Labour Market Services” (Erstes bis Viertes Gesetz für Moderne Dienstleistungen am Arbeitsmarkt, 2003-2005, “Hartz I-IV”).

¹¹ Earlier labour market legislation in the late 1990s already introduced the “activation turn” (JobAktiv-Gesetz 2002), but did not entail such deep structural changes in the Bismarckian unemployment security system as the “Hartz” legislation (Ludwig-Mayerhofer and Wroblewski 2004)

¹² For evidences and further references, please, refer to the earlier quoted publications.

showing many inconsistencies, which confirms our hypothesis. Whereas working obligations have been extended to the partners of the unemployed by law, regardless of their individual vicinity to the labour market (commodification), the practice of implementation is seemingly rather selective and the allowed exemptions from work obligations for family carers follow exactly the traditional gendered family model. However, the 'right to care' (de-commodification) has nevertheless been restricted by law as an exemption from the general rule, limited to certain standardised circumstances. Anyway, also in this respect the implementation practice seems to follow more often the traditional family model. Traditional paths have also been embarked regarding the "re-familialisation" of income risks by the stricter means-testing of households' neediness, stacked in particular against women living in partnerships. In general, the restricted eligibility and the cut-back of unemployment benefits for the majority of the unemployed follows a retrenchment logic towards a 'workfare' type of activation, whereas the other side of the 'social contract', i.e. enabling labour market schemes, have simultaneously been downsized. With regard to social citizenship, the German package of "rights & duties" within the new means-tested benefit regime has to be classified as clearly biased to the citizens' duties' side. The high degree of administrative discretion found in "many worlds of activation" (Barbier and Ludwig-Meyerhofer 2004: 423), in Germany comes along with a considerable lack of individual rights.

Summing up, we can observe rather incremental than fundamental changes in the German gender regime which are moreover quite inconsistent. This could be interpreted as a fragmentation of gender regimes (Bothfeld 2008) as well as of activation regimes (Serrano Pascual 2007). However, substantial changes are to be observed with regard to the people affected by the new unemployment regime and the patterns of social inequalities – which leads to the second research question.

2. Consequences of the German type of "activation" for patterns of social inequality:

On the basis of yet available data, it can be concluded that the gender segregation of labour markets has been aggravated by the recent labour market reforms. The intentional large scale expansion of precarious employment forms with low or even lacking social security addresses first of all those who traditionally work in such jobs: (married) women and mainly mothers, giving them not enough to earn their living independently from a breadwinner. But with more strict working obligations, also men are increasingly obliged to take up such precarious jobs under the new 'workfare' regime. Thus the segregation of labour markets may be structured increasingly less by gender alone, but also by class. This seems to be true also with regard to the observed gender-class biased allocation practices of 'enabling' labour market schemes, showing that particularly for the most vulnerable groups there is not much of empowerment in the German activation system.

The official legal objective of gender mainstreaming within the Hartz IV legislation has not been implemented consequently as the law does not stipulate any further regulations or procedures how these goals should be controlled or implemented in administrative processes. As a result, evaluation studies reveal that the objectives of equal opportunities policies in the large majority of public employment agencies are of very subordinate priority.

With regard to German policy strategies towards the tension between the individual's "right not to care, but to work" and the "right to care", inherent to the activation approach, we can draw the following conclusions: The right to work is still far from being realised for those who have always been at a disadvantage within the German model – women with caring responsibilities, including single mothers. As evaluation studies reveal, mothers of young children enjoy considerably less support with 'enabling' measures (as well as they are much less imposed to sanctions) than fathers, this is even true for the small proportion of unemployed single fathers. The right to care is only recognised for selected groups, as evaluation shows, more for mothers than fathers, but only on a meagre subsistence level and entailing the denial of the right to work – as there are nearly no entitlements to enabling measures. Instead, strong fiscal incentive mechanisms are at work against supporting a (supposed) "weak" clientele. Hence, instead of empowering citizens by strengthening their autonomy, in the German case citizens have very little choice. They must subordinate under an *"intrusive guidance in the 'right way to live'"* (Skevik 2005: 51) in case they fall under a category to be "activated", but their needs of assistance to develop capacities for autonomy are more or less ignored by a downsized system of ALMP.

The German type of "activation" seems thus to be mainly a rhetorical way of implementing a retrenchment policy, as already some authors have suspected on the eve of the Hartz reforms (Ludwig-Meyerhofer and Wroblewski 2004). A real "activation agenda", i.e. the investment in human resources by enabling schemes appropriate for empowering citizens to earn their living, seems to be at least postponed to the future (Knuth 2006). Before implementing efficient measures of gender mainstreaming on the one hand, and abolishing those mechanisms resulting in "creaming" practices and an unequal allocation of public resources on the other, such a bright future of "true" activation is not at sight. This would also require to bring the scales of the 'social contract' into a more balanced position, taking account of the necessarily reciprocal nature of activation in an understanding of modernisation processes that considers the growing reflexivity of individual and social life.

Finally, what does the German case tell us in a quick and fragmentary comparative view? Activation seems to entail a high degree of discretion in many countries so far, including not only "conservative" welfare state regimes like Germany or the Netherlands (Knijn 2004) but also the "universalistic" Scandinavian line (Larsen, J. E. 2005); Skevik 2005). However, there are still considerable differences: In the German case, there are nearly no entitlements to enabling

measures or counselling, and the resources for ALMP have been cut. The influence of unemployed clients on their activation plans seems to be smaller in Germany than in other countries. However, even in the model country of activation Denmark there seems to be a discretion-based classification of the unemployed which allows for longterm unemployed less individual autonomy than for those better-off (Larsen, J. E. 2005). Hence, the activation approach apparently operates in a difficult area between giving (more or less) support and exerting paternalist control (Skevik 2005). An inclusive form of citizenship that allows for combining gainful employment in living wage jobs and unpaid care work on a decent subsistence level for all people and in a gender-balanced way (Knijn 2004) is still far from being realised anywhere. However, such utopist visions of inclusive citizenship (Lister 2007), empowerment and social inclusion should not be left out of sight as a benchmark of real policies.

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