Social consequences of changing labour market conditions and undeserved personal virtues : lectures on age, class, ethnicity and gender

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- Lectures on age, class, ethnicity and gender -

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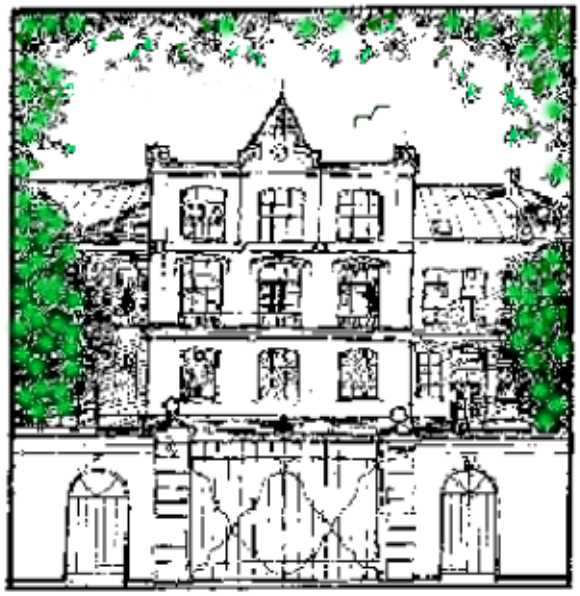

Socialhögskolan

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Preface

In October 2002 an international week was held in Lund, Sweden. It was organised by the School of Social Work at Lund University. The theme was ”*Age, class, race and sex – Social consequences of changing labour market conditions and undeserved personal virtues.*”

In the course of five days 20 students met with scholars from five countries and fulfilled some field visits. The following publication is a compilation of the lectures given during the week. The first two chapters concern age, the next two ethnicity, the next two class, and the last one gender. Of course all contributions partly overlaps.

In the first chapter Dr. Ilse Julkunen from STAKES in Helsinki, Finland, outlines the situation for unemployed youth. She presents the situation with the help of results from a European research project. Using a framework derived from Williams and Popay (1999) the complex welfare policy situation is discussed on different analytic levels.

In the second chapter Senior lecturer Anders Böggild Christensen from the School of Social Work in Århus, Denmark, discuss early retirement and the older population's situation in the labour market. In a well set out argument he is testing if the Danish welfare state is diverging from a social-democratic regime towards a liberal or conservative one viewed in the regime typology presented by Esping-Andersen (1990).

In the third chapter Dr. Lars B. Ohlsson from Lund University, Sweden, highlights the importance of starting within yourself when relating to issues of differences. The concept of *Us and Them*, discussed with the aid of Elias and Scotson's study ”Established and Outsiders” (1965), illustrates how categories in a community occur and prevail.

The discussion is followed in chapter four by Dr. Norma Montesino from Malmö University, Sweden. She questions the use of the concept of ethnicity in social work. By referring to scholars as Simmel, Elias, Tilly and Bourdieu she argues about how concepts are misused historically both in science and practice. Enlightenment of social workers in how excluding mechanisms work would perhaps produce a closer connection between needs and resources, she concludes.

In chapter five Dr. Max Koch from University of Ulster, Northern Ireland, discuss ”the regulation approach” and how inclusion processes may be understood. By referring to both classical sociologists as Marx, Weber and Simmel, and to modern research on post-Fordism, he points to how changing work organisations produce a new employer - worker relationship. The forms for control change and he presents us with some possible development trajectories moving from Fordism to post-Fordism.

In chapter six Dr. Lars Harrysson, Lund University, discuss how the reform of the Swedish public pensions can be viewed in a class/group perspective. A discussion influenced by the writings of Paul Pierson and Adam Jamrozik points to the central theme of a conversion of structural aspects of income provisions and subsistence towards individual concerns of capital investments and insurance.

In the final chapter Dr. Lesley McMillan from University of Sussex, England, makes a comparison between United Kingdom and Sweden concerning voluntary work with violated women. She introduces us to the development of voluntary work, how people are motivated to volunteer, and to whom actually volunteers.

The international week was possible to fulfil due to that some different research and student mobility networks were assembled at the same time in Lund. Without that cooperation the group of excellent contributors would have been severely cut down. Thanks to the ”The Future of Work” network, Nordplus, and the board of the Association of Nordic Schools of Social Work.

In October 2003

Lars Harrysson

To be Young and Unemployed
A welfare perspective

Ilse Julkunen

In this lecture I will form a picture of how it is to be young and unemployed not only in the Scandinavian countries but also in Scotland. I base myself on the comparative study on youth unemployment in Northern Europe and which I have newly written my thesis on (Julkunen, 2002). What I would like to draw attention to is the changing societal context of young people, what it means to have a welfare perspective on youth unemployment, and finally what the main results were and what we can learn from these in a comparative perspective.

The unemployment situation - a short comparative glimpse

Over the last ten years the increase in youth unemployment has been particularly sharp. This increase in youth unemployment has occurred despite a demographic decrease in the number of youth and an increased level of educational participation within most member states. In many OECD countries youth labour market problems were expected to diminish as the youth cohort declined in size (OECD, 1996), since large declines in youth cohort size might be expected to raise young people's employment prospects and reduce their unemployment rate relative to that of adults.

Among the countries involved in this study Finland had the highest unemployment level (17% in 1996), followed by Scotland (8% in 1997). A typical feature of the Nordic countries, with the exception of Denmark, is that the unemployment rates have been lower in the last 20 years than in most other OECD and EU countries. Thus, unemployment is a relatively new phenomenon, a fact that affects the long-term unemployment figures. Overall, the long-term unemployed have accounted for approximately 40-50 per cent of total unemployment, whereas the proportion has been relatively low in the Nordic countries. The numbers have increased dramatically in the last

few years in Finland, and the situation is beginning to resemble that of the rest of Europe. The average degree of long-term unemployment in EU countries was rather high, 41% in 1996, among the countries involved the average is 28%. Long-term unemployment was by far the highest in Scotland, 43%, followed by Finland with 37%, in Denmark and Norway was between 27-28%, whereas the percentage was lower in Iceland and Sweden (16-17%).

The changing societal context

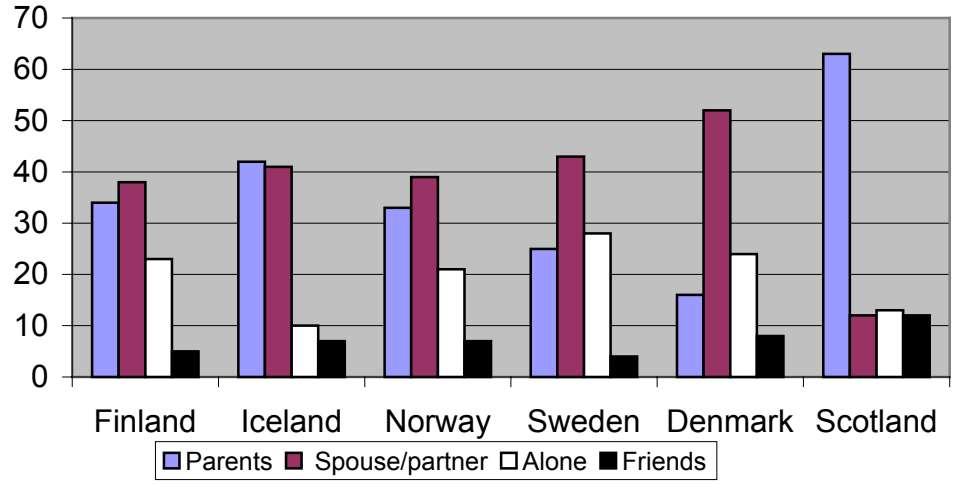
Youth studies have usually categorised youth in three different periods: the educational phase (16-18), the transitional phase (19-21) and the establishing phase (22-25) (Jones & Wallace, 1992; Carle & Sjöstrand, 1995). Still, this division has not been accepted internationally, since categories are always based on national experiences and definitions (Carle, 2000, p35). It has been argued, though, that the lengthening period of transition - extended perhaps past the age of 30 - has on the one hand blurred the whole concept of youth. On the other hand, it can be argued that the extension of the period has highlighted more strongly the whole youth period and has triggered studies on youth, mainly in youth culture research. Setting the limits of youth thus becomes partly an empirical question. Studies have, for instance, shown that young people start a family at an increasingly later age than previous generations. They study longer and gain economic dependence at a later age. Galland (1995) speaks of a series of intermediate situations that are socially ambiguous and may be prolonged for a number of years, situations which in their definitions belong neither to adult roles nor to adolescent roles. It seems that there are transformation patterns that characterise youth all over Europe. These transformations are then rather profound and similar, albeit they may vary according to circumstances prevailing in each country. Tendencies found on a national may thus be subsumed in some major types. Accordingly Galland (1995) has distinguished three different youth models in Europe:

- The Mediterranean model: protraction of studies, a longer period of precarious employment after the conclusion of studies, a tendency to continue living with parents even when a stable job is secured, swift recourse to marriage after leaving the parental home, and relatively few young people living alone or as unmarried couples.

- The Nordic model and France: protraction of studies, a longer period of precarious employment including exploratory employment, leaving home relatively early and starting a family relatively late, a mixture of short-lived relationships or living alone.
- The British model: early abandoning of studies, early entry into the labour market and an extended phase of living with a partner but without children. The average age for a first union is one of the lowest in Europe, but a marked delay before the first child is born.

It can, however, be debated whether these models can be applied to young unemployed people. The young people in our comparative study are aged 18-24 years and come from the Nordic countries and Scotland. They are not a representative sample of young people in general, nor of young unemployed people in general, but of young people with a longer experience of unemployment, a minimum of three months. Taking the youth models of Galland as a reference point and comparing the situation for young unemployed people based on their residence at the time of the interview, we get the following picture for the Nordic countries and Scotland.

Figure 1: Residential patterns of 18-24 year old unemployed people in Northern Europe



(Source: The Northern European survey on youth unemployment)

First of all, the most evident differences are noted in Scotland compared to the Nordic countries. In Scotland a majority of the young people live with their parents, whereas this is not the case in the other Nordic countries. In addition, from this figure we can detect two countries that deviate from the other Nordic countries, ie. Denmark, where a majority of the young people live together with a partner, and Iceland, where less young people live alone and a higher percentage live either at home with their parents or live with a spouse. It seems thus that the Nordic countries diverge into three different youth patterns: the core Nordic pattern, where young people leave home relatively early and start to live as couples relatively late, the Danish pattern, where young people marry/cohabit at a relatively early stage and the Icelandic, where young people marry/cohabit at a relatively early stage or live with their parents. Scotland, on the other hand, is characterized by a much longer phase of living with parents. This feature was not found in the British model of Galland. For young unemployed people these patterns seem then to be somewhat different. According to White (1994), patterns of residence among young people can be explained by economic, political and demographic factors.

But what are the societal changes that affect the life experiences of young people? Is it merely the employment situation, which has dramatically changed in the 1980s and 1990s, or other factors related to other spheres as well? Coleman and Husén (1985) have highlighted a number of social changes that are important for understanding the life situation of young people. These are not only changes in employment and job opportunities, but also in female employment participation, parenthood, as well as increased education and drug problems.

- Over the 1980s and 1990s, both labour force participation and employment rates of youth have declined. This has occurred in spite of declines in the relative size of the youth population (OECD, 1996). In many countries youth labour market problems were expected to diminish as the youth cohort declined in size. But no such improvement has occurred in most countries.

- Increasing numbers of women are working, including women with small children (Fagan & Rubery, 1999). Although women's participation in working life in Europe has increased, the unemployment rate among women there has remained high.

- There has been a great expansion of education, with regard to both financial investments in education as the increasing numbers of young people who are enrolled in post-secondary education (OECD, 1996; 1998).

- In between education and working life an institutional grey zone has emerged and become increasingly important in youth transitions (Nyyssölä & Pajala, 1999, p32).

- Families have become smaller, with a growing number of one-parent families (Dallos & Sapsford, 1995). This is especially the case in the Nordic countries compared to the rest of Europe (Kautto et al, 1999).

- Moreover, a higher proportion of unemployed youth is now in households where no one else is employed (OECD, 1998).

- Young people are also faced with cuts in social benefits that extend the period during which they remain dependent on their families (Nyyssölä, 1997; Furlong & Cartmel, 1997). Young people stay at their parents' home for a longer period, and the obligations of parental support extend far into adulthood.

Overall, it appears that a young person in the 1990s is confronting a different reality than that of his or her parents. Trends towards flexibility and diversification in the life course reflect the ways in which people organise their lives. It can be concluded that the relation to family and the institutions of the society has changed. The lengthening period of youth transition has meant that young people become more dependent on either their family or society during a longer period. This may lead to new conflicts.

Approaching the youth unemployment issue

If we look at how unemployment is understood we can broadly find a division between an individual and a structural approach. The first individualises and privatises unemployment. It blames the individual for the problems of unemployment. If people would only look for a job more actively they would not be unemployed. The structural perspective puts more emphasis on social structures and blames society for the problems of unemployment.

Unemployment is thus a status that may be defined from outside but also may deviate from the interpretations of the unemployed themselves (Halvorsen, 1999, p18). According to different labelling theories (Becker, 1963) public attitudes lead their own lives independent of whether they correspond to the facts or not. Individuals interpret their lives on basis of their own experiences but also on the basis what other people think of them or what the public image of the problem is. They can react to these labels by accepting and incorporating them, by rejecting and opposing them, or by redefining them. If we integrate the different approaches to youth unemployment and people's reactions to them we can achieve a picture of the different ways unemployment among young people is perceived and experienced (Table 1).

Table 1. Definitions and reactions on youth unemployment

	Reactions		
Definitions of youth unemployment	*Incorporation*	*Rejection*	*Redefinition*
Individual lifestyle (your own fault)	Loser	Normalisation	Individual
Structural (society's fault)	Helpless Dependent	Self help Informal jobs	Drifting
Welfare (individual concern and structural constraints)	Coping	?	Alternative choices

(a modified version of Siurala, 1994, p83)

The individual approach to youth unemployment may cause youth to react with resignation. Employment and welfare authorities may see the young as passive, problematic or lazy, and as a consequence the unemployed young people may see themselves as losers. They are not good enough or qualified enough and they feel guilty as a result of being unemployed. A rejection of this view might lead to reactions of protest or simply convincing people in trying to live as normal a life as possible, ie. being socially active, pursuing hobbies and being highly motivated to work. A redefinition might see unemployment as a new way of life, creating a lifestyle where unemployment is accepted, thus legitimising unemployment.

The structural approach to youth unemployment may cause reactions of helplessness among the young. The young are seen as victims of social circumstances. They need help, and various services are offered them. This may lead to a dependence on welfare. A rejection of this view would be based in one's own abilities and trying to solve the problems on one's own. This might also include looking for different ways of supporting oneself, such as informal work. A redefinition would not involve strong feelings of helplessness, or of self-help, but of defining oneself out of the system, not contacting authorities or services, but legitimising one's role as victim and drifting day by day.

What would be the difference of a welfare approach, of accepting that unemployment is both an individual concern as well as a structural constraint? The main difference of the welfare approach is that it acknowledges that the young persons actively participate in the process and the coping process depends as well on individual possibilities as structural factors. Consequently, this approach will not lead to negative reactions but towards active coping. It is not clear whether reactions of rejection would evolve and where these reactions would lead. However, redefinitions would be plausible, since the welfare approach acknowledges the actor perspective in that people can act upon and shape the definitions of unemployment. Alternative choices are then possible.

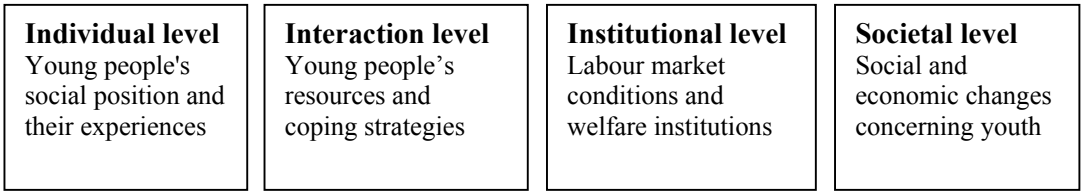
The welfare approach - Researching the unemployment issue

An important aim of my thesis was to make social structures more transparent in interpreting individual experiences. Contextualising is crucial in relation to understanding how society itself explains and deals with misfortunes. Do we look at unemployment as the consequence of personal failures alone, or of market failures alone, or are perhaps both involved? The comparative approach makes it possible to confront both sides by describing and comparing different welfare aspects and systems in the countries involved and using these as reference points in interpreting individual experiences. The multiple and complex phenomenon of youth unemployment was examined through a welfare approach. The welfare approach has associations with the action theory of Mörch (1997), which points to a mixture of thinking and doing in social contexts. It broadens thus the issue of coping to not only be an issue of reactions and actions in relation to unemployment as a stress factor but to consider the context within which these occur. But how can it be studied in practise?

Williams and Popay (1999) have contributed a new framework for social research that challenges both the individual and the structural approaches. Firstly, they address the preconceptions of the welfare subject. They claim that in order to grasp the differences between individuals and the possibilities for creative human agency, we need to move away from seeing people as just passive beneficiaries of state intervention, or from seeing them as fixed, single categories of young, unemployed and poor, or in terms of one-dimensional, objective socio-economic classifications. Secondly, they present a paradigm that tries to connect the structure and the agency on four analytical levels, viz. the welfare subject, the social topography of enablement and constraint, the institutional and discursive context of policy formation and implementation, and the contextual dynamics of social and economic change. This kind of examination does not necessarily have to engage equally with all four levels, but it should take account of the influences operating at all four levels. Williams and Popay also highlight the importance of developing mediating concepts in trying to make the distinction between structure and agency more transparent. Developing mediating concepts, such as the concept of coping, enables us to better understand the relationship between personal history and the social and material world. More specifically, it would

provide a framework that connects the study and practice of formal welfare provision to an understanding of personal psychological and social coping strategies. These mediating concepts can be seen as a form of rational reconstruction. Essentially, the challenges put forward by Williams and Popay are not new. These arguments can be found in contemporary youth research (Waara, 1996; Lähteenmaa, 2000) and in social work (Karvinen, 1999; Bergmark & Oscarsson, 2000). What is new, however, is that they address the problems of both approaches and in so doing provide a tool for dealing with causal complexity.

Figure 2. The welfare framework



(modified version of Williams and Popay, 1999, p180)

The first two boxes, the individual and interaction levels, form the basis of the empirical analyses included in my dissertation. At an individual level the different studies analyse young people's social background and their experience of their current life situation. This includes not only taking into account such factors as gender, qualifications and household composition, but also individual agency such as the ability to act individually. At the interaction level young people's perceptions of their resources and constraints are analysed. These include not only young people's coping strategies but also possibilities of obtaining benefits and services. Although the dividing line between these two are not that distinct, a main dividing line may be said to go between individual actions on one hand and individual reactions on the other hand. The last two boxes, the institutional and societal levels, constitute the background within which young people's unemployment experiences are examined and interpreted. Institutional factors cover mainly welfare benefits, labour market programmes and welfare services, including also the role of family as a welfare resource. These factors are empirically analysed from a subjective perspective through the experiences of young unemployed people. The societal level is perhaps the most abstract level in the sense that no single factor other than the country level depicts the societal level empirically. This level is present in contextualising the national

difference with regard to the unemployment level and different welfare strategies.

Trends, patterns and diversions

In this overview I have tried to summarise the results by presenting them on four different levels, viz. individual, interactional, institutional and societal level.

The individual level

If we look at how young people experienced unemployment we found some patterns. In countries with low unemployment such as Iceland and Norway, social control appeared to be stronger, and particularly Icelandic youth found that they were blamed for their unemployment (Julkunen, 2000). In contrast, young people in Finland felt very strongly that unemployment was not their own fault, but still they felt that people looked down on those who were unemployed.

No clear gender differences were found. It was as problematic to be unemployed for women as for men. To be a mother did not change the situation. This has partly to do with the modern role of women. Still, on a comparative level the study showed that equal labour market opportunities were only possible in Sweden.

It was assumed that the unemployment level and the extent of long-term unemployment would reflect coping patterns in the countries studied. The study showed that coping patterns varied according to both societal and individual conditions. The experience was least distressing in countries with high levels (Finland) or longer experience of unemployment and good employment possibilities (Denmark). On the other hand, it was most frustrating in countries with low unemployment and a high work ethic (Norway and Iceland). Scotland differed in most respects from the other countries, in that the young people were neither frustrated nor active, but seemed to form a group of drifters.

The interaction level

Focusing more closely on the individual activities the findings showed some general patterns, for example that participating in sports reduced mental-health problems among unemployed youth. However, having an active social life did not necessarily lead to a higher probability of individual well-being. Material factors provided an important mediating factor in explaining the different experiences of Scottish youth. Even though material resources formed a strong explanatory determiner of mental health for all young unemployed people in the study, the analysis showed that young people appeared to have more alternative opportunities in the Scandinavian countries. The case of Iceland was an interesting exception in that coping was much more centred on problem-solving activities. This may well correlate to the higher level of self-help in Iceland and to the fact that conditions there are regarded as amenable to change. The fact that job seeking was associated with a higher probability of mental well-being in Denmark confirmed the assumption that coping strategies reflect factual employment opportunities.

From a Northern European perspective unemployment appeared to be an issue of mastery in Iceland, to some extent a question of finding alternative occupations in Denmark and Norway, and more a question of survival and finding a social life for the Scottish unemployed young people. It can thus be concluded that coping with unemployment was generated and shaped by and reflected in different social contexts.

The institutional level

In explaining young unemployed people's reactions and actions this study used welfare strategies as an analytical framework. It has often been claimed that unemployment research tends to focus too narrowly on structures as determining factors. However, acknowledging the whole welfare chain in studying unemployment among youth does not mean that the interaction is single-directed. On the contrary, it is a question of how young people respond to and actualise these circumstances. Young peoples' relationship to welfare strategies and family support may then be crucial.

All in all, the rate of deprivation was highest in Scotland indicating that the Nordic model has succeeded better in maintaining equality even during recession. Still, there was important variation

among the Nordic countries. Deprivation was much lower in Denmark than in the other countries. This indicates the ability of the Danish welfare state to guarantee the living conditions of the young and unemployed. However, it appears that it is not the coverage or the level of unemployment benefits that makes the difference, but other factors that were not controlled for. Another clear distinction among the Nordic countries was found in Finland, where transitional and inter-generational factors were more important in explaining deprivation. The mechanisms behind deprivation closely resembled the pattern in Scotland. This implies that policy measures in Finland have not been adequate to prevent the problems from becoming more generation-specific.

Family support was a key issue in preventing deprivation among unemployed youth. An interesting comparative aspect was, however, that the role of the family was strong in both welfare models, in the Nordic countries and in Scotland, although it was by far the strongest in Scotland. The case of Scotland is understandable, since up to 60 per cent of the Scottish young unemployed people lived at their parents' home. The fact that parents have a strong mediating role in all the countries involved points towards a tendency to place more responsibility on the family. However, the role of support from parents showed conflicting tendencies, since instrumental support increased deprivation.

And what can we learn from this? (The societal level)

The study showed also that the problem of unemployment was not only an issue of level and duration of unemployment or welfare strategies but is also related to other aspects. Young people do not act only according to economic circumstances but also according to principles of moral rationality which are related to cultural ideals and values in the society. Thus, in addressing the issue of being young and unemployed the relationship between the state, the family, the labour market, the educational system and values and norms in society must be taken into account.

Comparative research entails a continuous search for ways of encompassing and learning from similarities and differences. In practice, in dealing with youth unemployment, it is a question of examining the welfare needs of individuals within the society they live in and about keeping politics out in the open rather than hidden.

According to Esping Andersen (1990) the welfare state has developed through the principle of decommodification, where the individual is guaranteed public support independent of the market. Esping-Andersen (2001) argues that as a welfare regime the Nordic model has been famous for its emphasis on employment and the de-familiarisation of responsibility for providing welfare. Some argue that recent welfare strategies can be categorised by re-commodification through the implementation of different workfare models in social policy, particularly regarding youth (Lødemel & Thickery, 2001). Abrahamsson (1999), on the other hand, claims that there has not been much evidence pointing to re-commodification or to the fact that the Nordic welfare states show a dual character, with good levels of payment and services for the labour-market active population, and less generous levels for marginalised groups. Most welfare analysis are, however, macro-oriented and do not focus on specific groups of people, such as the young (cf. Nordlund, 2000).

This study has focused specifically on young people and in so doing it has highlighted the social circumstances surrounding them. Despite increasing transitional fragmentation was found among the young, structural constraints played an important role, indicating that tendencies towards re-commodification in the welfare state are to be found in the implementation of welfare strategies for the young and unemployed. A tendency also towards re-familiarisation could also found as young unemployed people seem to have an increased dependency of family support.

All in all it could be seen that Scotland differed considerably from the other Nordic countries. The consequences of youth unemployment seemed less severe in the Nordic countries than in Scotland, showing that these countries have succeeded better in combating youth unemployment. But is it so that the Scottish strategy of assigning greater responsibilities for welfare to the market explains the rather negative results in Scotland? Previous studies have found similar evidence. Longitudinal research in Scotland has highlighted the ways in which policy initiatives, which initially were introduced to alleviate the consequences of high levels of youth unemployment have instead provided an institutional framework for the reproduction of inequalities (Furlong 1993). Is this the lesson from this comparative research?

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Labour Market Politics Concerning Age and Early Retirement - the Danish Case

Anders Böggild Christensen

From decreasing supply to workfare

I shall argue that Danish policy concerning elderly and early retirement has shifted position from a perspective where it was accepted that elderly participation in the labour force should decrease as the participants' age increased to a strategy that aims at increasing elderly participation in the labour market. This shift is driven by a changed recognition of demographical developments but it can be conceived, too, as a political strategy focusing on radical workfare. I will consider whether these developments can be seen as part of a change in the Danish social democratic welfare state, as converging towards the conservative and liberal welfare states (Esping Andersen, 1991).

The Danish welfare system's income support for the elderly

The Danish labour market can be considered as an institutional labour market that is highly regulated but with very flexible standards for hiring and firing, which leads to a close link with the security system for people who are not employed (Mølsted Jørgensen, 2000). As a result, almost everybody older than 18 has a working income or a benefit from the social system/insurance system or educational system. Very few people are taken care of financial by family or network. This is the changed societal reality from 1960 till today. In 1960, only 200,000 from the age of 18 to 65 received income support from the social system. Today the figure is close to one million (Mølsted Jørgensen, 2000). The activity rate of labour has been quite stable, but with a general decrease in the frequency for men and a rapid increase for especially married women with children (Mølsted Jørgensen, 2000, p34).

From 1958 till 1973, the Danish labour market was characterised with high conjunctures, low unemployment and a rapidly increasing labour force. As a consequence of the oil crises in 1974 and 1979, the Danish unemployment rates rose sharply, culminating in 1983 with an unemployment rate of around 10%. In the mid-1980s, there was a short recovery but from 1987, a major recession followed until 1994, where the unemployment rate topped close to 13%. The Social Democrats went in to office in 1993 and, as a result of Keynesian inspired economic policy, the unemployment rate fell to around 5% and the labour market has increased with around 200,000 new jobs (Mølsted Jørgensen 2000, p36).

Unemployment in Denmark is segmented very unevenly. In the 1970s, the main concern was the high level of unemployed youth. Today, the greatest concentrations of unemployment are centred among people with no education and low skills, women, ethnic minorities and the elderly (Denmark Statistics, 2002). In comparison, youth unemployment has vanished. The unemployment rates for people over 50 are, in 2001, around 6% (Denmark Statistics 2002). But these figures are underestimated due to Early Retirement Pension (Førtidspension) from the social system and Early Retirement Pay (Efterløn) from the insurance system (See Appendix 1).

The Early Retirement Pension is an income support delivered by the social system to people from 18–65, who have lost their ability to work on physical, psychological or social grounds. In the Danish context, this pension was created in 1921 after the reunion of South Jutland with Denmark and has been regularly reformed. From 1960 to 1970, the number of receivers increased from a 100,000 to 200,000. Since then, it has slowly expanded, so that the total recipients of Early Retirement Pension in 2001 is 270,000 people. Most recipients are above 50 years old and the majority are women, which ”collides” with the decreased working activity rate for women above 50 (Denmark Statistics, 2002). In 1999, the Danish parliament decided on a new reform of the Early Retirement Pension system with the intention of minimising the numbers of new recipients. This was to be accomplished through a new standardised technique of street-level social work for social clients, where the clients would be matched to a new, big scale development in jobs under special conditions (Flexjobs) (Socialministeriet, 2001).

The Early Retirement Pay from the insurance system was created in 1979 and covers people who are members. Entitlement to Early

Retirement Pay begins from when you reach 60 years old and continues until you become 65, when you turn to the Old Age Pension system. Originally there were two arguments for the Early Retirement Pay. Firstly, youth unemployment went very high in the 1970s and it was argued that the elderly could withdraw their engagement in the labour market in favour of young members of the labour force. Secondly, there were a large number of low-skilled workers, who had spent long working lives in very hard jobs, who were now in bad health but who were not so bad as to qualify for Early Retirement Pension. Early Retirement Pay was a way to make a decent solution. (Mølsted Jørgensen, 2000).

The Early Retirement Pay became an immediate success and far exceeded the expectations of the politicians. Since, the numbers of recipients has just expanded. In 2001 there was a total of 180,000 recipients and consequently, as a result, Early Retirement Pay is more expensive for the State than the total cost of unemployment benefits (Denmark Statistics, 2002, p58). In other words, nearly 50% of the people aged 60 to 65 use their entitlement to Early Retirement Pay. In 1992 the Danish Parliament made adjustments to Early Retirement Pay in order to prevent further expansion, but the adjustments didn't help according to the intentions. A new, harsher reform was presented in 1999. This reform increased the principles of insurance and was at the same time constructed to enforce incentives for not using your entitlement. It is now more inconvenient to use your entitlement when you become 60. If you wait till you are 62 or above, it is then much more advantageous. It is still too early to draw conclusions whether the reform has attained this goal of reducing the number of recipients.

In 1992 the Early Retirement Pay was expanded to people between 50 and 60 years old (Transitional Allowance), who had been unemployed for more than one year. Indications showed that the long-term unemployed elderly had very few chances of getting a new job again. This possibility of early retirement was abolished in 1996 again but, by then, 45,000 people had already opted for Transitional Allowance (Mølsted Jørgensen, 2000).

Political agendas according to age and early retirement

I have chosen three themes or agendas concerning age and early retirement: first, old-age unemployment, second, work-related health and exclusion, and third, demographical changes.

Unemployment benefits over the last four years in Denmark have been payments of approximately 400 euro per week as gross income before paying tax. After four years with unemployment benefits, the entitlement according to the insurance system is used-up and clients are therefore transferred to the social security system with less advantageous social assistance benefits (Mølsted Jørgensen, 2000). Most old-age unemployed people receive benefit through the insurance system. Combined with the receipt of benefits is an obligation to participate in workfare programmes. Ideally they are formed as a contract to combine individual wishes and goals with the labour market prospects for further employment (Mølsted Jørgensen, 2000).

It's a fact that unemployment in Denmark is closely related to age, which is easily documented in official statistics, and which actually presents an underestimation because of the many elderly receiving benefits though Early Retirement Pension and Early Retirement Pay. It seems as though age is a crucial stigma when employers recruit labour (Langager, 1993; Csonka, 1995). This circumstance is also related to health and the fact that investments in work-related education and further qualifications are not addressed to people who are approaching retirement age but are reserved for the younger generations. Therefore it is an increasing problem with long-term unemployment concentrated on the elderly, even though the figures get better during high conjunctures.

Politicians have tried with a few selective strategies such as service jobs, which were reserved for the long-term unemployed above 48 years old. These possibilities were immediately stopped due to the change of government in Denmark, in 2001, where the right-wing parties had a very successful election. The main political strategy has been towards changing the attitudes towards elderly though new terminal constructions. There have been campaigns for ”The Grey Gold”, referring to the capacities and resources that many elderly with years of experience in the labour market can contribute.

There are very few signs that it is working. These campaigns can help the elderly, given the fact that fewer people overall become both unemployed and unemployed over the long term; but unemployment

is still concentrated. One suggestion is that politicians know that the employers very soon will be in need of labour and therefore are forced to choose not totally ideal sources of labour, from an employer's point of view. This situation will possibly have an effect on old-age unemployment as well.

There is a close correspondence between work-related health and early retirement. Health is a very important variable in relation to unemployment, Early Retirement Pension and Early Retirement Pay. It is obvious in relation to Early Retirement Pension, but there are documented relations to the other benefits as well. One of the major problems here is the work-related problems that follow the aims of increasing efficiency and rationalisation. Recently these problems have become enormous, even in the public sector, which traditionally has been less demanding. The traditional problems are concentrated on monotonous repeated work, where a high tempo and little influence on the work situation create an environment with high levels of sickness and work-related health problems. Karasek's job-strain model reflects this (Søndergaard Kristensen, 2002); documented, for instance, in the textile industry, the fishing industry, the meat industry and so on.

In the mid-1990s, the Social Democratic Government proposed a new strategy called ”The Inclusive Labour Market”. It intends to change the welfare mix, making enterprises assume greater social responsibility and enforcing a strict workfare policy, where clients themselves have greater responsibility for supporting themselves. The strategy is formulated as prevention, retention and integration. Prevention is to prevent exclusion, retention is to retain labour at work and integration is to integrate the long-term unemployed.

The politicians try to cope with prevention through policies of working health and regulation regarding the labour market. Many industries have tried with new methods of production. There are plans to address the issues of monotonous work and jobs with low influence. Even so, it seems to be a structure that is very hard to deal with. On the one hand, the underlying capitalist mode of production enforces a focus on profitableness, which is in many ways supplied by the workers' focus on high earnings. Therefore there are very few indications of an improved, health-oriented working life and the exclusion of labour due to bad health seems to remain an equally crucial problem (Iversen, 2002).

The strategy of retention is more successful. Since 1998 approximately 15,000 jobs have been created with special conditions for people who cannot deliver a full optimal performance at work. The employers receive a benefit from the social system in order to support more jobs on special conditions. Most employed in these jobs have had work-related health problems but have not qualified for Early Retirement Pension. The ideology behind this strategy is that client-employers can still make use of some resources at the work place. Therefore we now see a cutback in the numbers of people receiving Early Retirement Pension.

The strategy of integration is related to the Danish workfare and activation programmes. There is no clear documentation of the effects of this policy, although there are many reports and evaluations on the topic (Rosdahl, 1998; Langager, 1997; Weise, 1997). A new critical report suggests that supply-side politics is not that important to the level of unemployment. The demand for labour is the crucial issue: and that is equally applicable for long-term unemployment and integration as well (Goul Andersen, 2002).

According to demographical transcriptions, Danish society is changing. The number of people above 65 years old will increase considerably over the next 30 years, from around 700,000 to more than 1 million. At the same time, there is no sign of increased numbers in the workable ages. The politicians formulate this as the problem of maintaining income support from the State, and there is a widely spread scare surrounding the lack of labour we will see in a very short time.

Therefore the politicians want more people of each age group in employment, so as to expand the activity rate of labour. And at the same time they want fewer people receiving Early Retirement Pension and Early Retirement Pay, so as to increase the average age when people withdraw from the labour market. Therefore we saw the reform of Early Retirement Pension in 1999, making it harder to qualify for the relevant benefits, and we saw the reform of the Early Retirement Pay in 1999 that strengthened incentives for not making use of this insurance.

The Danish Parliament has just decided on a new labour market reform, which aims at increasing the number of people in the labour force by 87,000 until 2010 (www.am.dk). This is very ambitious, given the negative demographical developments over the same period.

It is very hard to say if this will work. The changes to the Early Retirement Pension system will decrease the numbers of people on Early Retirement Pension, but they can result in problems for clients in other respects. There are certain problems related to the possibilities of reasonable work conditions and huge financial risks concerning the complex around a job on special conditions (Hohnen, 2000). The changes to Early Retirement Pay that strengthened incentives for not requesting it have had the immediate effect of applying sanctions against the people who need the solution most, whilst cheering the people who needs the insurance least.

Today many scholars in Economics suggest a removal of the Early Retirement Pay, and we can see political formulations that this will be a topic during the next election. In 1999 it was very difficult to change the Early Retirement Pay System, because the Social Democratic party had won the election in 1998 partly by promising to keep Early Retirement Pay. The conception of many voters was that this could not be changed and, when it was changed, it was regarded as breaking a promise. This is arguably but probably one of the reasons why the Social Democrats had a very bad election in 2001, leading to a right-wing Government in Denmark.

Theoretical considerations

In a Danish context, it is obvious how workfare or activation has become a central element in the politics of welfare. It started with an active labour-market policy around 1980, where the unemployed were offered special jobs to strengthen opportunities and regain claims for unemployment benefits. In 1994 the labour-market policy shifted in a more strategic way with a higher focus on allocation and qualification. It was centred on an individual contract, which the system and the unemployed should negotiate about. Activation should lead to a job or qualify for a period of education and help match supply and demand for labour. Activation should not be a goal in itself.

In 1990 the first movements appeared towards an active strategy regarding clients in the social system that were unable to insure themselves because of their lack of connection to the labour market. The general motivation behind these programmes for young unemployed was a general worry of the long-term consequences of being reliant of the social system and a wish to strengthen incentives so that clients would not wish to be clients. In the beginning it covered

only young unemployed with no other social problems apart from being unemployed (Jonasen, 1998). With the reforms in 1994, 1998 and 2002, it today covers all recipients of social assistance, no matter what other social indications or problems.

In the beginning of the 1990s, several studies indicated that people who fall ill and therefore apply for benefit have a high risk of ending up with Early Retirement Pension. That covers 40% who receive sickness benefits for more than 13 weeks. This knowledge led to a general transformation of the system, as formulating a social work strategy that could prevent this exclusion from the labour market. The results are today implemented and can be measured from the reform of the Early Retirement Pension in 1999. People falling ill should remain in contact with the labour market.

I would suggest that these developments – where three different systems with three different client groups (the unemployed, people on social assistance and the sick) has turned into the same political strategy with the same political goal of clients becoming self-supporting – can be viewed as a rationality of labour-market policy, which colonises a social-political rationality with focus on needs and equality. This is reflected in the Danish resource system where all social assistance, early retirement pension and sickness benefits have been transferred from the Ministry of Social Affairs to the Ministry of Labour (today called the Ministry of Employment – Beskæftigelsesministeriet). Jessop suggests that the changes of the welfare states can be viewed as a transition from a Keynesian welfare state (KWS) to a Schumpeterian workfare state: ”In abstract terms, its distinctive objectives in economic and social reproduction are: to promote product, process, organisational, and market innovation in open economies in order to strengthen as far as possible the structural competitiveness of the national economy by intervening on the supply-side; and to subordinate social policy to the needs of labour market flexibility and/or to the constraints of international competition.” (Jessop, 1994:24). I think the Danish case indicates this transition. In spite of this transition, Jessop is still operating with different regimes of welfare/workfare: ”…just as there were different forms of KWS, we can expect differences across societies in this new form of state” (Jessop, 1994:24). One could propose a concept of different worlds of workfare.

Whether the changes in the welfare mix (Pestoff, 1996) can be viewed as part of a change to the Danish welfare system that is universal and de-commodified is worth considering. It is evident that

there have been developments that put a higher notion on the market and civic society. This is reflected in New Public Management, new forms of social insurance and an increased participation of NGOs in welfare-state solutions. Can this be viewed as the Danish welfare state converging with the conservative or liberal welfare states? Indications here are not quite clear.

The argument on the one hand is that the Danish welfare state is not being transformed but is only adjusting to new sorts of societal challenges (Kvist, 2000). Therefore, reforms of Early Retirement Pay and Early Retirement Pension ought to be viewed as ensuring the continuation of the Danish Welfare system. And even though there have been some changes, the Danish welfare state is still distributing around 30% of GNP, which has remained quite constant over the period of these adjustments.

On the other hand, there are indications that the Danish welfare state is increasingly using principles of insurance, which can be seen as moving towards the conservative welfare states. The Danish pension system has in the last ten years gone through a transformation building very large labour-market-related private pensions. This may in the long run challenge the universal Danish pension system. Combined with the reforms of Early Retirement Pension and Early Retirement Pay and the focus on activation or workfare, one can ask if the de-commodification (Esping Andersen, 1990) still is so obvious in a Danish context! The increased focus on clients being self-supporting could indicate a move towards the liberal welfare state.

However the topic and valuation will appear different if we include social services, where the Danish welfare state is very institutional (Borchorst, 1998). Due to the fact that there are several developments that point in different directions, it's hard to reach simple conclusions.

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www.am.dk.

Appendix 1

Danish income support concerning elderly and early retirement

	Programs of income support		
Filters	*Unemployment benefits*	*Early Retirement Pay*	*Early Retirement Pension*
Criteria for Admission	Getting a member of insurance funds: **a.** employed, employers, competent education **b.** housing in Denmark **c.** 18–63 years	**a.** Member of unemployment insurance fund	**a.** Physical, Psychological, Social indications **b.** 18–65 years
Criteria for Receiving	**a.** 1 years member (pay insurance) **b.** 1 years work (or education) **c.** Able to and willing to work	**a.** Paid insurance in 25 years **b.** 60–65 years	**a.** No resources in relation to work
Criteria for the level of benefits	**a.** 4 years benefits **b.** maximum 400 euro pr. week	**a.** 300–400 euro pr. week **b.** withdraw of income from pensions or work **c.** tax-free fee if you wait till after 62 years	**a.** 200–400 euro pr. week plus additional benefits

Note:
Benefits are taxable. Disposable incomes are seemingly lower.
The criteria mentioned here are very basic. There are many additional criteria.

The Established and the Outsiders
- Aspects of inclusion and exclusion

Lars B Ohlsson

In current debate a number of terms are used to describe the positions of different groups and individuals, eg. deviation, marginalisation, segregation, integration, inclusion and exclusion. The terminology aids us in giving everyday life a manageable structure and meaning, but it also work as a tool of stigma and to keep large groups outside society, not least in research agendas. By using the terminology as structuring devices and analytical categories to describe and understand processes of exclusion do we add, although not purposely, to the formulation of the boundaries of exclusion.

To understand these processes it is necessary to begin within us. By viewing our own position and behaviour it will soon be obvious that it is about *Us and Them*. Norbert Elias and John L Scotson have in a very illustrative way described how it works in their study - *Established and Outsiders* (1965).

Winston Parva

Elias & Scotson studied in the beginning of the 1960's a suburban area in the outskirts of a large and wealthy industrial town in central England. They called it Winston Parva (WP). WP had a population of less than 5000, but had its own industries, schools, churches, shops and clubs. Elias & Scotson were able to categorize WP in to three areas:

Zone 1. A middle class area
Zone 2. A working class area (most of the industries were established here)
Zone 3. A working class area

One single contractor built WP during the 1880's. The first area built was zone 2. During the 1930's and 40's zone 1 was built as a residential district with detached houses. People with the opportunity

and high enough income moved in to zone 1, which became an area for them better off. Zone 3 was built later and on land earlier disqualified. It was claimed to be wetlands and the haunt of rats. The apartments stood empty for a long while despite low rents. It was first when an Army camp and a military industrial complex were established the zone was inhabited. Quickly an ”Us and Them” relationship was realised between the established in zone 1 and 2 and the newcomers in zone 3.

Design and analysis

Elias & Scotson searched answers to why this segregation had occurred and what function it had. Initially they studied demographic and social factors as class, income, work and origin of the population. However, they did only find minor differences between zone 2 and 3. The major differences were between zone 1 and 2.

The analysis of quantitative data did not give any satisfactory explanation to why zone 2 and 3 appeared so different. They had, as the quantitative analysis clarified, a similar social structure seen through socioeconomic and class factors. According to Elias & Scotson an answer had to be found elsewhere. Their new hypothesis focused on the necessity of studying the groups' contact and confrontation, as well as what barriers and conflicts arose when two earlier independent groups became dependent on each other. Or as Elias phrased it - those figurations arising when cultures and values meet.

The fulfilled qualitative study, based on interviews with every 30th household in the voting roster, voluntary organizations and a youth club, did not produce an acceptable basis for an explanation of the antagonism between the zones.

Elias & Scotson's conclusions were therefor that it was possible to analyse and compare areas as these three using historical, economical, cultural, political, religious and administrative variables. However, such an analysis would not provide a complete explanation of inclusion and exclusion, as well as of the existing process of marginalisation. As Elias & Scotson found there were no significant differences between zone 2 and 3. The explanation rather had to be looked for in the relationships between the inhabitants in the areas, ie. how people established relations over life when they played, went to school, worked, did business, worshipped or had an enjoyable time together. The most elementary forms of social life, they argued,

develop mutual dependency and constitute the basis for the existence and formation of society (a societal contract).

> What matters is the recognition that the types of interdependencies, of structures and functions, to be found in residential groups of home-making families with a degree of permanence raise certain problems of their own and that the clarification of these problems is central for the understanding of specific character of a community qua community. (E & S, p.147)

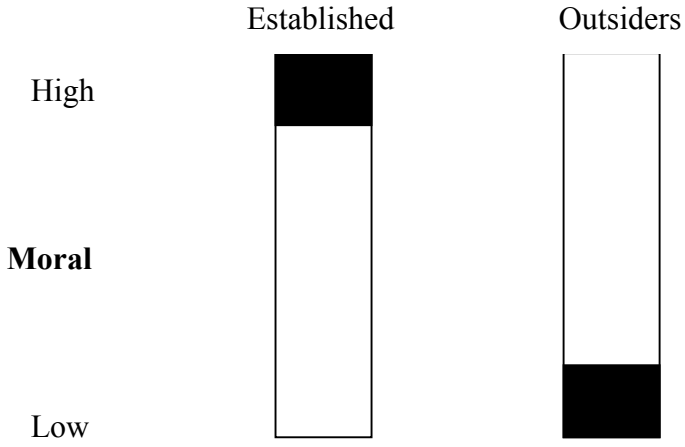
A central theme described by Elias & Scotson concerns differing attached values of the families and their members in networks of the kind. Expressions as better, worse, nice, weird, connected to their capabilities of adapting and following existing values and norms, ie. the rank of families and status in the society. At the top of the hierarchy they found those with a long history in the community. The conflict was one mainly between old and new groups. Old must not be understood as biological age, but as ”a unique social position and superiority.”

This power structure can only survive if it is transferred from generation to generation and if the sources of power are monopolized, ie. kept out of other groups' reach. Elias & Scotson called it ”monopolized transfer of specific abilities”, as connected to common taboos and norms of conduct that separates better groups/individuals from worse.

In their analysis Elias & Scotson found three patterns that strengthened segregation and maintained the societal structure. First what they called ”the old mother centred family” in which the village elite was reproduced. Second that local clubs and family networks played an important role. And third that gossip had an important function in establishing and supporting social order. They mentioned gossip centres and how cliché-based judgements, condemnation and discrimination of ”them”, while praising and promoting ”us”, continuously fed the existing order. The gossip had both an integrating and a segregating effect and contributed to the development of group charisma and collective shame. The situation created a configuration that none longer could control, it was shaped collectively by superiority – subordination, collective shame – group charisma, or in other words internalised behaviour.

Elias & Scotson's conclusion was that the image the established, the powerful and ruling segments of the community, had about

themselves and mediated to others had a tendency to be based on the most excellent part of an idealised group. On the other hand, the image of the others, the outsiders, with relatively less power, had a tendency to be based on those worse off, whose characters were negatively enhanced. Members of the established partition that fell outside the frame, ”black sheep”, had a tendency of being expelled or excluded. However, this figuration was not a static situation, but a continuous dynamic process.



Taken from preface by Gunnar Olofsson in Elias & Scotson (1999) p. xiii

Conclusions

Elias & Scotson argue that their analysis is applicable on all levels. It may be used for analyses of small local communities and work places, as well as for regions, nations and global systems. In many societies, processes of the kind, of inclusion and exclusion, focus on views of sexuality, religion, and class- and ethnic belonging. Particularly clear are these processes when;

> Confronted with the difficulties of a highly mobile and quickly changing world one is apt to seek refuge in the image of a social order which newer changes and projects it to a past that newer was. (E & S, p.160)

First when a ”rational figurative analysis” of existing figurations' nature and structure is done it is possible to understand and control exclusion and inclusion processes.

Processes of exclusion and inclusion are relational

Exclusion and inclusion and discourses of marginalisation relate to space and boundaries of normality. These boundaries are either social, spatial or symbolic, or a mix of them all. The fixation of the boundaries is a process of ongoing discussions and rearrangements. A boundary does not need to be real, ie. it has no actual content or focus (Tuula Helne, 2001). In the transition to a post-modern global society there is a tendency of a blur shaping or description of its boundaries, such as the global village (Mcluhan, 1967) and the multi- or trans-cultural society.

Values in the post-modern society have also become more relative and thus made it hard to capture what is normal and what is deviant and different. Definitions of normality are losing their sharp edge. Discussions on marginalisation can, in this perspective, be seen as a structuring and integration crisis.

Social exclusion and inclusion must be understood as dynamic processes evolving over time. These processes are relational, ie. they can only occur as a consequence of individuals or groups meeting. Outsiders are not excluded in any absolute sense; hence a term as ”social exclusion” is problematic to use. Outsiders are always related to other individuals and to society. The established and the outsiders live in symbiosis, based in a figuration of power and dependency, ruled by social interaction and by the structures of society.

Our terminology for understanding this process is far from complete and in need of constant review. According to Ulrich Beck (1998), for example, we need to adapt our terminology to fit a more unbound, less integrated and pluralistic world: a new global sociology.

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Ethnicity as a Concept in Social Work

Norma Montesino

In research on poverty (as well as in many other research fields) ethnicity is often seen as an important concept. The fact that immigrants often are represented in vulnerable groups has led to a search for explanations to these groups' troubles. Ethnic background has often been regarded as a, if not conclusive, but a strong influence to the understanding of these group's marginalization, vulnerability or poverty. The ambition of finding social policies particularly destined toward immigrants has in many respects been self-evident. This has made it easier to find funding for research in the ”immigrant question.”

The objective of this lecture is to question ”ethnicity” as a useful concept in social policy research. The term ethnicity is often used without a clear definition. My doubts have methodological, socio-political and theoretical causes, and are inspired by Simmel (1986/1908), Elias & Scotson (1967) and Tilly (1998) whom are analysing exclusion in a relational perspective. I will focus on two major aspects. First the historical roots of the terminology, and second its use in social policy.

A historical review of ethnicity as concept

The term ethnicity was introduced as a factor in social sciences in the 1950's (Hylland Eriksen, 1993). It aimed at explaining differences in a positive vein, and in so substitutes the negative conception about difference that had dominated Western thought during the early twentieth century. The use of the term gained acceptance in connection to the new migration patterns short after the World War II (O'Dell, 2002, p27). In the 1950's were culture and ethnic identity used in relation to studies of gypsies (Montesino 2002). Its diffusion and wider use is found in explanations of international migration: labour migration in the 1960's and refugee migration later (O'Dell, 2002). In the current debate, in politics as well as science, the use of the term ethnicity is well established.

It is not possible to ignore that ethnicity (also the concept of culture) has developed in relation to other terminology. In this context I think of emotive notions as race, a term used to segregate groups of people during the nineteenth century, and of culture much used during the 1940's and 1950's (O'Dell, 2002). In the definition of race there is an implicit idea that it is possible to divide a population in to well defined groups (races), and if individuals do not fit into a category they represent a deviation from normal/pure or natural.

In the turn of the 19th and 20th centuries race biology was established as a new research field. In several places around the world research institutes searched for biological criteria to be able to identify and classify ethnic groups. Race biology was to present a conclusive explanation of social, cultural and economic differences between groups and individuals (O'Dell, 2002). The events in Europe during the World War II meant serious doubts of the race biological perspective. Instead differences should be discussed and explained with the aid of other concepts and models, culture and ethnicity found a use.

The terminology of culture carried some old conceptions, such as the idea of a possibility of giving a clear definition and limitations, eg. that culture can be separated from each other. Change as a consequence of cultural diversity was initially understood in negative terms, as ”cultural dissolution”.[1] Despite trials to see differences in positive terms former negative conceptions did transfer to the new terminology. Culture and ethnicity is still sometimes referred to as unchangeable capacities inherited from generation to generation. Ethnicity defined in a ”neutral” way does often hide a hierarchic division between the majority of the population and others. These ”others” are conformed to the category of ethnic minorities. Ethnic minorities are identified as representatives of certain social problems, and in this discourse clearly demarcated from problems arising among the majority of the population.

All attempts to redefine the concept of ethnicity are immediately forced to deal with its old heritage. Instead of a stress on static and inherited ethnicity social anthropological studies now focus on relations and change (Barth, 1969). Current studies of ethnicity study relations between groups who label themselves with a certain ethnic

[1] See eg. studies on Gypsies such as Tillhagen (1957, 1965), and Takman (1963, 1966), and on the Sami such as Lundmark (1998) and Mörkenstam (1998).

identity. Essence based views are questioned when ethnicity is seen as a social construction, a dynamic phenomena that occur in some situations but lose meaning in others. Even in these newer perspectives there is a tendency of identifying sharp distinctions between groups as ”ethnic boundaries”, and to view them more static than dynamic. Focus on change has not meant the abolishment of patterns of understanding where ”ethnic identity” within one individual still is described with concept easily seen or related to as deviance, ”ethnic anomalies” (Hylland Eriksen, 1993:92).

In the public debate ethnicity has been used as an explanation of the social problems that hit individuals or groups in the category of immigrants. At the same time the debate on poverty is based in an unspoken conception of that classical explanations to poverty (eg. class) is connected to the majority population, while poverty among immigrants is rather described as culturally related problems (O'Dell, 1998; Ålund, 2002).

Explanations based in a division of the poor in two groups reflect a perspective established already in the poor laws. In an early attempt to regulate poor relief were the poor divided in ”ours” and ”strangers”. This dichotomy has been transferred to social policy studies, which borrow existing stories to explain social problems occurring among individuals in the immigrant category. Ethnicity is one current example of such a story. Other similar stories concerning for example race and culture have been used for the same purpose.

Integration of the poor

In the social policy context the concept of ethnicity has been ”borrowed” from related fields. The process provide a transfer and adaptation of old traditional divisions, eg. from race biology, and given a new in its modern context acceptable language. This intellectual heritage is easily detectible in the everyday context where earlier accepted language use is questioned and replaced by new expressions approved by the time spirit, eg. foreigner become immigrant, gypsy become Romany, immigrants become ethnic minorities. In a research context the relation between old and new concepts has not been elaborated. Added to this the new concepts concrete use is missing.

A historical review gives us a clearer picture of how the use of concepts has been directed to the legitimizing of social policies aimed

at making the poor to conform to existing conditions from time to time. The poor that were affected by the project were defined by the aid of special criteria. National boundaries were during the first half of twentieth century the most important criteria, ie. citizenship. Poor individuals or groups that were not citizens should be deported.[2] Their exclusion was often justified in terms of race biological arguments. Similar arguments were used to legitimize sterilization and detention of poor citizens that did not fit the requirements for normality (SOU 2000:22).

Behind changes in the treatment of the poor are a questioning of the category vagrants as such and the repressive character of the methods used to make them conform. Arguments used to legitimize the move referred to social factors, and former vagrants were defined into the category of socially disabled.[3] A special designed organisation was built to aid this group's integration into the labour market (SOU 1949:4; SOU 1964:43). In the 1950- and 1960's the campaign for the recruitment of foreign labour was intensified. When social problems eventually were identified among the new immigrants, an inquiry into the question was demanded. In this inquiry the basis of today's Swedish immigration policies took form (SOU 1967:18).

Problems identified in the inquiry into immigration were classical problems that stroke the poor population, eg. unhealthy and confined living, segregation, growing unemployment. Administrative solutions and measures were collected from established organisations working with so called socially disabled clients. It was legitimized with arguments from research in ethnology and social anthropology. However, the focus on work as essential was common to all poor (native or immigrants). The discourse on culture and ethnicity reinforced the impression of a need of special attention and activities for immigrants. The same discourse could be used to justify success and expansion, as well as failure. Specialized studies strengthened the separation of the poor immigrants. Especially the partial profiles provided by these studies blocked the obvious observation that the same methods earlier had been used on other poor groups.

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[2] The first Swedish immigration law was directed toward poor foreigners, eg. Gypsies, Armenians, Italians, Jews, and foreigners identified as a threat to national security.

[3] An example is that Gypsies settled in Sweden for a long time were awarded citizenship, while other Gypsies were seen as foreigners and treated according to the immigration law.

A basic model

In Elias & Scotson's study ”Established and Outsiders” (1967) and in Charles Tilly's work ”Durable Inequality” (1998) are analyses of marginality and poverty based in a relational perspective developed that integrates different categories into a single explanatory model. In earlier works also Georg Simmel worked towards clarifying the positions and spatial movements of poor and strangers. Both, which as categories, play an important role in the making and working of a social organisation. The factors that position them in social life are the same, ie. their positions are always defined in relation to other categories/groups. This basic relational perspective is the basis for the mentioned sociologists work.

Elias & Scotson define the dichotomy ”established and outsider” as a social configuration, which are the result of long term group processes. The possibility to change position inside a configuration is a matter of relative power. It is not individual neither collective attributes that creates the position of the ”established”, it is rather that they come first and gain control over resources and the definition of the terms of social organisation. With the aid of these terms, or rules, they maintain and strengthen established positions. The ability of the ”established” to keep together is decisive in what way and extent they can withhold or expand their privileges. Storytelling becomes very important in this process since they legitimize the established positions, not least the exclusion of the ”others”. Stories that provide opportunities of segregation and exclusion are based in ideas of the ”others” lower morale.

Charles Tilly (2000) further Elias' model when he places the concept of category in focus of his analysis of unequal social relations. ”Established” and ”outsiders” appear as a categorical pair in Tilly's work, ie. two categories that are separated but at the same time tied to each other. Tilly use ”categorical pairs” as a basis in the study of social organisations.[4] When connected with another basic concept in his theory, ”hierarchy”, an uneven relation occurs. Tilly refers to different mechanisms (exploitation, emulation, opportunity hoarding, adaptation) that uphold and institutionalise unequal relations. The same mechanisms explain the origin and reproduction of social inequality.

[4] Social organisation is used by Tilly in a very broad sense, eg. the State, the family.

With the aid of Tilly's analysis we are able to understand phenomena that normally are explained by the same stories used to legitimise the division into groups and categories. These stories are conceptions of differences and similarities upheld by the same relation they describe.

New stories can evolve with new categories. A newly formed category consists of individuals who establish a loyal relation in competition with others outside the group (Tilly, 2000, p75). The story maintains different functions. It explains the existence of the group and it justifies the group's actions against those left out. The story tells us who belongs to group, what joins them, and what divides them from others (ibid:76). Thus it explains why others are excluded, at the same time as it justifies the hierarchical relation established between groups.

Stories, argues Tilly, are not solely inventions but evolved from existing material, such as available concepts, myths, symbols, ideas and more. Finalised stories are later used in the social interaction. They become institutionalised and stiffened stories that legitimise inequality.

By means of Tilly's model, it is possible to understand the logic in the history of the State's relationship to the poor and to study how this logic is reflected in the State's relationship to poor strangers. The State as an institution was established and legitimized by first defining itself in relation to those who were excluded and represented a ”non-order”. To justify the State's policies, various kinds of stories were created. In this context, poor strangers personified characteristics in those who beyond the State borders, those who did not belong.

In a descriptive historical study we shall identify the different stories that legitimize the State's relationship to poor strangers. In the turn between the nineteenth and twentieth centuries it was race biology that justifies the treatment of the poor and the exclusion of poor strangers. After the end of the World War II it was the discourse of social disabilities that dominate the speech of social workers, stories of cultural differences or/and similarities replace race biological arguments. The changing policies against the gypsy population in Sweden in the 1950's were justified with arguments about their cultural disappearance. The authorities used the same ideas about culture in their policies against poor strangers when the majority of those groups were defined in terms of cultural similarities. Race, culture and ethnicity are concepts that the social workers used and use in their daily work not for getting a better understanding of their

”clients”. These concepts are used in the form of stories that reproduce ideas about ”the other” and prevent us from the understanding of individual's particular situations. In this context culture or ethnicity shall be understood as ”stories” with the character of upholding divisions.

Education, research and praxis

In social work the division between natives and immigrants is taken for granted. Social workers approach and/or treat clients the way they have been taught, ie. that there are differences between group/ categories based in their cultural/ethnical backgrounds. Instead of searching for who the client really is, he/she is placed in an existing category. These categories are used as clichés. They hide ignorance and lack of interest. Researchers use ethnological and social anthropological studies to establish the existence of categorical differences based in ethnicity. On every level established divisions and hidden conceptualisations are verified.

If we search for difference we will find it. However, it is not a question of denying the existence of difference, but that a quest for that we initially have to establish whether it exists or not. I demand a larger degree of curiosity, ie. we have to search for the real picture before commenting on it.

In Pierre Bourdieu's ”The Weight of the World” exposure is described in terms of ”social suffering”. Even here we find a relational perspective and thereby an understanding of particular situations according their context. ”The Weight of the World” gives us a good description of different destinies, of individuals or families, who lack contacts and money to choose their way of living, are forced to live in areas where only their exposure is the common feature. They see each other in the public places available. Their frustration and their lack of opportunities to form their own futures are expressed in various ways. Youth is attracted to the gang, elderly do not accept newcomers, social workers get ”burned out” when they realise that their project does not matter, and newcomers gather together. All these people have in common that they are forced into the position. Their different ways of handling the situation is a question of strategies for survival. Bourdieu show that this social suffering is not possible to explain solely by studying the suburb, because it was created on the basis of decisions made somewhere else. Everyday problems among the inhabitants of the suburb are not culturally based, but material.

In the chapter ”Understanding” (1999, p607) he discusses troubles and traps occurring in research situations. These are visible in the concrete interview setting. In some cases it is a question of events where the interviewed is used to be in the situation and thus control the act.

> …and the statements of those most closely – sometimes too closely- attuned to such assumptions, at least according to their own conception of them. The latter acquire such a mastery of the situation that they sometimes even impose their own definition of the game on the interviewer. (Bourdieu, 1999, p612).

They can both identify expectations and adapt to them.[5] Further, they can use the interview situation to structure and give certain legitimacy to their life history.

> In this exchange relationship, each deceives the other a little while also deceiving herself: the researcher is taken in by the ”authenticity” of the respondent's testimony, because she believes it gives access to a raw, dense, inviolate form of speech that others will not have known how to pick up or to provoke (certain more or less stylized forms of peasants' or workers' speech can exert the same seduction); the respondent plays her expected part as the Immigrant. Without having to seek it openly, she is assured that the literary value of her speech is recognized, which testifies simultaneously to the divided character of her consciousness and a quest for salvation through style. (Bourdieu, 1999, p617)

The distorted communication that Bourdieu describes is also reflected in political life. A division of the population in categories has political consequences. It contributes to an enhancement and reproduction of exclusion when measures against poverty are divided between projects for immigrants and projects for natives. This policy blocks these groups from identifying themselves with each other. Rather opposite, the division leads to a perception of the others as potential enemies in the hunt for scarce resources.

If social workers are aware of the different mechanisms that contribute to the exclusion they should try to know who the people are, and their needs, instead of reinforcing those categories that prevent or distort communication.

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[5] The problem is discussed in Laneemets (2002).

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Social Inclusion in post-Fordism

Max Koch

Introduction

Sociological classics such as Marx, Weber and Simmel have treated capitalism as a force driven by the necessity and individual wish to accumulate wealth. This force tends to transform itself into a catalyst that changes the distribution of work. Generally speaking, capitalism can be both creative and destructive. It can display favourable and desirable results in terms of economic development and score high in terms of both system and social integration (Lockwood, 1992). But capitalism can also – and historically has done – score very low in terms of inclusion and display extreme forms of exploitation and exclusion. Whether capitalism scores high or low in terms of inclusion depends greatly on the way its main elements are connected in an institutional network. In this chapter, social inclusion and labour market inclusion in particular are interpreted from a regulation theoretical perspective. First, it refers to some of the basic assumptions of the regulation approach and discusses the *modus vivendi* of social inclusion in Fordism. Thereafter, the chapter touches the debate on the crisis of Fordism and outlines possible Post-Fordist growth paths. Finally, it raises the issue of social inclusion in the context of these different models of development.

Social inclusion in Fordism

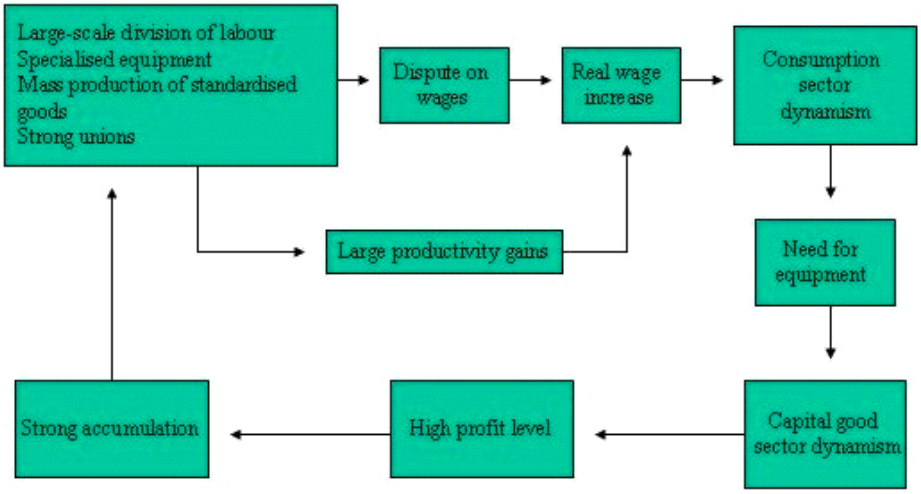
The regulation approach has been designed to understand the dynamics of institutional and social change within a capitalist society. It is associated with writers such as Michel Aglietta (1987), Alain Lipietz (1987; 1998), Bob Jessop (1990; 1997), Joachim Hirsch (1995), Adam Tickel and Jamie Peck (1995) and many others. While these authors tend to regard the abstract features of capitalism as largely constant, they address both crises in the accumulation process and periods of expanded production and growth in the context of their institutional, social and political 'embedding'. At the heart of the approach is, therefore, not so much the 'general laws of accumulation'

as disclosed by Marx but rather stress is placed on the historical variability of economic and social dynamics. Five concepts are employed to understand the institutional settings necessary for continued and expanded capital accumulation.

(1) An *industrial paradigm* refers to the dominant division of labour. (2) *Regimes of accumulation* are associated with certain historical phases and development paths characterised by economic growth, 'under which (immanent) crisis tendencies are contained, mediated or at least postponed' (Tickel and Peck, 1995, p359). Such growth, if successful, takes the form of compatible commodity-streams of production and consumption, which is reproducible over a long period of time. (3) A *mode of regulation* is 'an ensemble or rules, norms, conventions, patterns of conduct, social networks, organisational forms and institutions which can help to stabilise an accumulation regime.' (Goodwin, 2001 p73). It includes both economic and political elements and it is usually described in terms of five dimensions: the wage relation; the enterprise form; the nature of money; the state; and international regimes. (4) An economically and politically successful constellation can furthermore achieve the state of a *hegemonic project* in Gramscian terms, if it is supported by the existence of a dominant ideology, formulated by the most powerful classes and adopted by the dominated classes and strata. (5) Lastly, regulationists refer to a *model of development* in conditions where these elements complement each other sufficiently to secure a long era of economic expansion and social cohesion. Aglietta's most famous example of such a model is American Fordism.

'Fordism' was characterised by a parallel restructuring of both the technological and organisational basis of the production process and the consumption patterns of the wage earners. The economy was dominated by large, vertically integrated companies, which applied mass production technologies and Taylorist practices of work organisation. The latter involved a clear distinction between conception and execution, production and sales, marketing and finance, etc. Productivity continued to rise through economies of scale together with strict control over the majority of workers who worked on the assembly line and required little training. Fixed capital was written off quickly and the amortisation costs were incorporated into prices (Friedman, 2000 p59). Profits were supported by consumer demand based on high and growing wages, which were usually determined in collective agreements and tied to expected productivity achievements.

Figure 1. The Fordist Capital-Labour Relation



Source: Boyer, 1995 p23.

There were two further pillars, which helped to secure the regime of accumulation and to bring about a historically unprecedented degree of social cohesion. The first pillar was collective bargaining, which tended to create wage equality. Whereas in the nineteenth century and the inter-war period labour struggles used to result in wage differentials across skill levels, sectors and regions, in Fordism wage rises in one sector often led to wage increases at the national level. This was due to the centralised collective bargaining at the sector level or even the national level, the mobility of workers seeking the best-paid jobs, and finally the existence of a minimum wage. The second pillar was the state. It fostered growth and productivity agreements between employers' organisations and trade unions by promoting capital accumulation through public infrastructure spending and permissive credit and monetary policies. Further, the state initiated substantial income redistribution through Keynesian inspired counter-cyclical economic policies. The creation and expansion of the welfare system supplemented and sometimes replaced interpersonal and intergenerational solidarities, which used to operate through family ties, with more collective and horizontal institutions. Above all the working class benefited from the expansion of the welfare state and consequently welcomed it, since it meant the recognition of the social wage, general access to health, basic education, pensions, and unemployment benefits.

Not only was the working class actively integrated in the growth project of Fordism, but also the non-economically active took benefit

from it to a certain extent. Reinhard Kreckel (1997, p164) illustrates that by borrowing the metaphor of 'centre and periphery' from the sociology of development. In his map of class and social positions not only the vertical class logic but also further dimensions of inequality, which overlay positions within the employment system, are considered: inequality between the sexes, between the employed and those who find themselves excluded from the labour market, between regions, branches and national economies in their positions in the world market. The centre is characterised by a concentration of powers and resources, the 'periphery' by a fragmentation of power and the lack of resources. In order to understand the mode of social inclusion in Fordism, the contested societal fields of society might be investigated following the logic of what Kreckel calls the 'corporate triangle': capital, work and state which are institutionalised in employers' associations, trade unions and in state authorities through intervention and regulation. The consideration of the institutional stage, and in particular, the state systems of income transfer, paves the way for an understanding of the living conditions and of the attachment to the 'working society' of those citizens, who totally or partly depend on this redistribution of income, for example the recipients of unemployment benefit or welfare (Koch, 2001, p201).

Social cohesion in post-Fordism

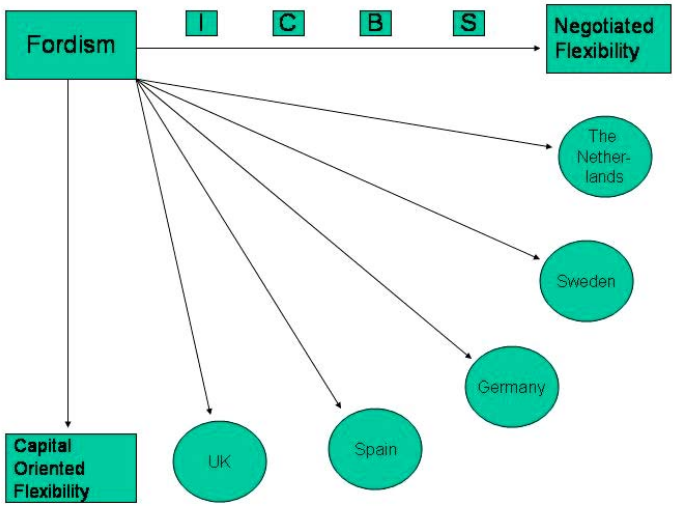
Among the proponents of the regulation approach there is a consensus that the Fordist compromise began to disintegrate in the late 1970s. Various economic and social crises, two oil shocks, increasing competition on the international and global level, far-reaching technological innovations and sometimes drastic revisions in economic and social policies made the maintenance of the essence of the Fordist accumulation regime increasingly inapplicable. However, there is no agreement yet on whether the advanced capitalist countries are still suffering from the crisis of Fordism or whether new accumulation regimes with corresponding alternative modes of regulation are emerging or have already emerged. In this uncertain situation, I would like to propose two things (see in more detail Koch, 2003, pp61-70): on the one hand empirical research on the transformations on labour markets and welfare regimes from a Regulation theoretical perspective, and, on the other hand, the development of pragmatic and open theoretical concepts which can

guide such work and are itself flexible enough to incorporate the empirical insights.

In the latter perspective, I suggest differentiating between two scenarios, each of which are characterised by a larger role of 'flexibility' and labour market adjustment than in the Fordist regime of accumulation. Researchers in virtually all industrial countries stress the increasing importance of management strategies that enable organisations to adapt quickly to rapid development in technology, greater diversity in labour markets, and growing international competition. Two distinct strategies of a more flexible labour utilization are normally emphasized: 'enhancing employees' ability to perform a variety of jobs and participate in decision-making, and reducing costs by limiting workers' involvement in the organisation.' (Kalleberg, 2001, p479) These two strategies are referred to in different terms, be it as functional vs. numerical flexibility (Smith, 1997), internal vs. external flexibility (Lipietz 1998) or organisation-focused vs. job-focused employment relations (Tsui et al., 1995).

Even though these studies follow different theoretical approaches, they nevertheless have in common the observation that the direct control of workers within a Taylorist organisation of work generally gives way to more indirect forms of control. Employment contracts tend to become less 'rigid' in the sense that they are temporary, and more flexible in terms of workload and working hours. The division of labour becomes more international and more fragmented. These developments increase the importance of negotiations between employees and employers, which can take place on the individual level (I), on the company-level (C), on the level of the economic branch (B), and on the societal level (S). Faced with increased international competition different countries and regions will develop different forms and levels of negotiations.

Figure 2. Roads to Post-Fordism



(Elaborated on Lipietz, 1998, p123)

At one end of the spectrum of possible Post-Fordist growth strategies, we can envisage what I suggest calling 'capital oriented flexibility'. Collective bargaining is decentralised and flexibility manifests itself in negotiations between employer and the individual employee. This often results in regulations concerning wages, working hours and dismissals that are almost exclusively based on the employer's interest in decreasing labour costs, in order to gain competitive advantages for his or her company. The de-indexation of wages is accompanied by a structural weakening of the unions. Work organisation will also mainly be oriented towards short-term gains in competitiveness and new technologies will be introduced mainly to achieve a decrease in labour costs and to reinforce controls, without actually transcending Taylorism. At the same time contributions made by employers to pension schemes, holiday pay, health insurance etc. are reduced, while public services are increasingly privatised. Legislation is introduced to facilitate hiring and firing. Dismissals lead less often to legal penalties. Trade unions and state labour market policy are weakened.

The road to Post-Fordism at the opposite end of the spectrum might be called 'negotiated flexibility', where collective bargaining is centralised and flexibility is arrived at in tripartite talks between employers' organisations, trade unions and state representatives. Wages, employment conditions and welfare will be negotiated in joint bargaining. The work organisation will not only consider the competitive interest in the short-term but also the worker's interest in long-term employment contracts and the enhancement of his or her

commitment. The increased flexibility of working hours and overtime is organised within defined limits and related to the length of the working week. Dismissals become more difficult and must be combined with offers of retraining. Passive and active state labour market policy remains intact.

Table 1. Growth Strategy and Labour Market Inclusion in Capital Oriented and Negotiated Flexibility.

	Capital Oriented Flexibility	**Negotiated Flexibility**
Growth Strategy		
Usage of Work Force	Extensive	Intensive
Productivity	Low	High
Level of Wages and Transfer Income	Low	High
Labour Market Inclusion		
Working Poor	Many	Few
Unemployment	Low	Initially high, then decreasing (depending on representation of the unemployed in three party talks)
Part-time Work	Rising, Capital Oriented	Rising, negotiated in tripartite bargaining.
State Activity, eg. in Creating a State Employment Sector and Offering Further Education, Industrial and Regional Policy	Weak	Strong
Informal Sector	Strong	Weak
Self Employment	Rising: due to 'despair'	Rising: due to state and regional consulting

The modes and extent of social inclusion, and in particular labour market inclusion, will heavily depend on the kind of Post-Fordist growth strategy a country follows. Where 'capital oriented flexibility' predominates, the growth strategy will be labour-extensive. This

might lead to full employment but at the expense of low productivity. The growth strategy is characterised by huge wage inequality. This is due, on the one hand, to the low level of wages at the lower end of the occupational system and, on the other hand, to decreased state transfer payments in order to increase the 'incentive to work'. Labour market marginality therefore mainly takes the form of working poverty. Part-time work is organised in a way which maximises the insecurity of workers; it is involuntary and flexible due to the changeable, competitive needs of the employer. In individual negotiations, employees rarely experience work situations that allow them to juggle their professional and private life. Self-employment will rise, often motivated by despair caused by the lack of satisfactory alternatives in the formal occupational system. The role of the state lies largely in the creation of optimal competitive conditions for international capital (Hirsch, 1995). All in all, the growth strategy is not so much a new compromise between the interests of employers and employees but rather a termination of Fordism from 'the top' in favour of short-term competitive interests of employers.

In 'negotiated flexibility', the new technologies will be used in order to modernise industries and to find an alternative to Taylorism. The use of labour is intensive, enabling productivity to recover much faster from the Fordist crisis. Real wages can therefore be at a relatively high level, thereby minimising the percentage of the working poor. The welfare state supports this through the provision of benefits. The state will generally remain engaged and oriented towards the rationalisation of, rather than the downsizing of, the welfare state. It will continue to invest in infrastructure and in active labour market policy. As in 'capital oriented flexibility', self-employment will increase, but in this model it will be supported by national and regional planning as well as by intensive training programmes. In a nutshell, the high productivity orientation allows the return to full employment combined with rising real wages, a modernised welfare system, relatively stable wage inequalities and, consequently, low working poverty. This growth strategy is therefore a genuine class compromise, clearly going beyond short-term interest in competitiveness and actively embracing workers' participation.

Comparative research indicates that the existence of a corporate tradition (as in the Netherlands) and of a strong labour movement with a correspondingly heavy emphasis in corporate bargaining (as in Sweden) are likely to prevent large wage inequalities within the working class. But also prevent the impoverishment of those outside

the corporate triangle. Here the chances for the realisation of growth strategies that consider the main aspects of 'negotiated flexibility' and its corresponding mode of social inclusion are better than in countries with weak corporatism and fragmented labour movements. A sizeable population of the working poor, typical of 'capital oriented flexibility', can not only be found in developing countries such as Brazil (Hornemann Møller, 1995) and Chile (Koch, 1999), but increasingly so in 'first-world' countries such as the United States of America and the United Kingdom (Walker and Walker, 1997). In all these countries we are witnessing a comeback of full employment after the crises of the 1970s and 1980s, but at the cost of poverty levels being higher than three decades ago. Today, the occupational systems of these countries have become flexible in the capital oriented way to such an extent that oppositional categories such as employed/unemployed, formal/informal occupation etc. are less revealing about the living conditions of the persons in question. Belonging to the informal labour market is not necessarily accompanied by poverty, nor does formal involvement in the labour market always lead to relative wealth. Neither does informality automatically mean exclusion nor formality inclusion.

Conclusion

The regulation approach has shown that to a great extent social cohesion in Western Europe after World War II was tied to the Fordist accumulation and regulation context. With the deepening of the crisis of Fordism and the gradual transition towards Post-Fordist development models came new conditions and challenges for social inclusion. Two scenarios have been distinguished in this respect, which at the same time may serve as a point of departure for empirical research on labour market reforms and changes of the social structure of advanced capitalist countries. Where 'capital oriented flexibility' predominates, social disintegration is advanced. The integration of the lower classes into the corresponding growth strategy is not based on consensus but on conflict – a class struggle from the top. The labour market becomes deregulated and individualised to such an extent that traditional sociological dichotomies such as employed/unemployed or formal/informal occupation lose much of their relevance. As mobility between unemployment, casual employment and different kinds of jobs requiring no or low skills increases, individuals are faced with increasing difficulties in trying to combine professional and private

lives. 'Negotiated flexibility', in contrast, is characterised by an effective new *modus operandi* of social inclusion, which integrates different social classes and groups into a common project on growth and the redistribution of wealth. It is based not on conflict but on consensus because not only the employer's interest in possibly optimal competitiveness is considered in collective bargaining, but also the employee's interest in long-term employment contracts, training, etc. are taken into consideration. The state especially is concerned with the stable reintegration of the unemployed and other economically marginalised social groups into the economy. The growth strategy here does not depend on cheap labour and exploitation, but on the active integration and skills of the workers.

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Equality and Pension Reform in Sweden

Lars Harrysson

Providing old people with a living is a social question that has its origins way back in history. However, a convenient point of departure is at the end of the 19th century and the then ongoing industrialisation process and the emerging discussions about social security. The breakdown of former ways of production and family networks, fewer possibilities of self-subsistence, as well as a growing exposure to poverty following decreasing physical abilities to work are reasons often cited. Urbanisation and migration enhanced this process. See them as a background.

Old age means increased risk of physical health problems and less capacity to wage labouring, which may lead to an economically vulnerable position. This was of course more probable before the rise of the welfare state. Organising economic provisions, such as pensions, for the aged, may prevent many negative effects due to age vulnerability. In this context organising refers to the shaping of preconditions for retirement solutions as well as providing these solutions.

I would argue that pension reform in Sweden during the 1990s was well needed. The design chosen however, can be seen as controversial due to its ideological base in World Bank recommendations that in some respects later have had to be reviewed as myths (Orzag and Stiglitz, 2001; Mesa-Lago, 2002). The process was part of a wider reform project that has clear connections to individualisation, privatising, and deregulating, all well founded in a neo-liberal political agenda. It is an international phenomenon (see Harrysson & O'Brien, 2003; Pierson, 1994 & 2001; Hagberg & Wohlner, 2002) where the focus of politics moved from respectfully viewing final outcomes to a favouring of certain means. Means have become ends.

My emphasis towards ends as important in political processes is based in that peoples' bonds to politics is characterised rather more by emotions than mechanical rational behaviour, rather more of social relations than individual incentives (see Spicker, 2000). The increased focus on means and sole self-interest enhances a mechanical view. Not least is this visible in arguments in favour of ”equal

opportunities" presented as a "level playing field" and other metaphors. With a toolbox of such metaphors the political process during the 1980's and 90's have shaped a society with a challenged legitimacy of the State, politicians as well as of governmental involvement in social life.

An enhanced belief in auditing and accountancy as measurements of welfare activities provides widespread fragmentation (Power, 1999), which promotes self-interest and basically blocks cooperation between agents (Persson & Westrup, 2003). Applied to a reform process, Adam Jamrozik och Luisa Nocella's (1998) theoretical framework "the residualist conversion theory of social problems" extends our understanding. In particular it highlights how influential interests and professional groups as lobbyists in alliance with politicians and an efficient public administration introduces legislation in which social problems of a structural kind is turned into mere technical questions by the administrative sphere (see also Estes, 2001, p18). When this "technicality" is ratified, groups or individuals are identified as carriers of the problem. Solutions then adapted in the operative sphere are therefor most often based in an idea of correction of a group or an individual characteristic, not the structural problem itself.[6] Even though the process gives attention to the wrong phenomena, it legitimise the existing order, the power structure.

If politics stops being political and neglects approaching the citizens, but instead maintain or reinforce the administrative sphere, the "Yes, minister" or "Think-tank" metaphors are plausible descriptions of the situation. In the pension debate, the transition of retirement income as a question of subsistence to one of insurance, provides us with an example of "residual conversion". Considering the problem of social security and pension reform in this perspective, a scenario concerning the Swedish case can be outlined and discussed.

[6] See especially Jamrozik & Nocella (1998) p50 and figure 6.1 on p108.

The formation of group characteristics

An analysis of pension reform resting on a concept of groups provides us with some essential understanding. Firstly how groups may influence the direction of a reform process, and secondly how outcomes of a reform may differ between social classes/groups. I am, as a starting point, going to use a definition gathered from Hans Heinrich Gerth and Charles Wright Mills' (1948) introduction to Max Weber's works:

> We may speak of 'Class' when a/ a number of people have in common a specific component of their life chances, in so far as b/ this component is represented exclusively by economic interests in the possession of goods and opportunities for income, and c/ is represented under the conditions of the commodity or labour markets.

The definition enable us to view and discuss classes and groups rather than just classes as often the latter is burdened by political connotations narrowing the range of possible conclusions. This does, however, not alter the major arguments in the analysis, namely that;

> a/ there is an unequal distribution of influence and resources between groups.
> b/ the inequality will be durable due to that economic ties are shaped when transactions become structures (Tilly, 1998) in which power relations and group divisions later are reflected.
> c/ there are patterns of actions and behavioural characteristics given to a group when defined, which will be internalised and later even self-induced (Elias & Scotson, 1999/1965).

These argument leads to two important questions. Amartya Sen argued in his seminal work on inequality that all discussions concerning inequality need to be triggered by the question: ”Equality of what?” By referring to the question ”equality of what” different ethical theories of social arrangement will be highlighted (1992, p. x). Referrals to equality, and consequently inequality, are judgements of situations wherein a scheme of normative classifications rule if the existing distribution ”of what” is to be considered a problem or not. The right to rule states the second question: ”On whose terms are changes made?” I suggest that the latter question form, at least partly, a possible answer to the question ”Why equality?”

What to follow

In the next section some examples from the Swedish pension reforms during the 20th century are presented. Some of them more than others exhibit class and group behaviour wherein power relations clearly influenced the outcome of reform. Some special attention will be given the latest reform.

Then, in the following section, I set out to reflect on the question ”equality of what?” A necessary task in the sense of the political basis of the problem discussed. Guided by the perspective presented above I aim at showing examples of what are equally/unequally distributed, how and on whose terms this distribution is upheld, and how the affected groups are included in the process.

Pension reform in Sweden

There are three major pension issues, which are connected to the class/group perspective referred to here. First the question of entitlement. Who is entitled, what is he/she entitled to, and what is required to attract full coverage? Second the issue of administration. In what ways are existing systems controlled and run, and by whom? Third the aspect of financing. How is the financing organised and divided between different groups?

Chart 1. Pensions in Sweden in the 20th century

	System	Entitlement	Administration	Financing
1914	1 Universal group insurance 2 Supplementary pension 3 Company based and/or agreement 4 Friendly societies 5 Private insurance	1 Contributions 2 Means-test 3 Employer discretion or stated terms 4 Membership 5 Contract	1 + 2 Government via post offices, local community boards 3 Companies 4 Friendly societies boards voluntarily regulated by law 5 Insurance companies	1 Mandatory fixed level contributions 2 General revenue 3 Companies and in cases also employees 4 Contributions from members 5 Contributions
1948	1 Basic pension 2 Company based and/or collective agreement 3 Private insurance	1 Citizenship 2 Employer discretion or stated terms 3 Contract	1 Government via social insurance offices (some housing subsidies on local level) 2 Companies for the majority, while salaried employees to a growing extent had theirs as insurance 3 Insurance companies	1 General revenue from payroll taxes 2 Companies and in cases also employees 3 Contributions
1960	1 Basic pension 2 Earnings related pension 3 Labour market insurance 4 Private insurance	1 Citizenship 2 Best 15 income years out of 30. 3 Collective agreement (salaried employees) Employer discretion or stated terms (workers) 4 Contract	1 + 2 Government via social insurance offices (some housing subsidies on local level) 3 Central labour market organisations (salaried employees from 1960, workers from 1972) 4 Insurance companies	1 General revenue from payroll taxes 2 Payroll taxes as individual fees and dividends from collective funds 3 Contributions as deferred wages 4 Contributions
1999	1 Earnings related pension 2 Guarantee pension 3 Labour market insurance 4 Private insurance	1 Lifetime earnings 2 Based on the level of income pension 3 Collective agreement 4 Contract	1 Government via social insurance offices, as well as PPM and insurance companies in the premium module. 2 Government via social insurance offices 3 Labour market organisations 4 Insurance companies	1 Contributions 50-50 between payroll taxes and employee fees 2 General revenue 3 Contributions as deferred wages 4 Contributions

Public pensions

The reform of the Swedish public pension system in the 20th century has been a process that has captured several examples of identifiable group bias. However, if such a bias shall be considered class' politics or not is another question. In a critical perspective an assumption of such a connection is common and often well founded. In Sweden the corporative structure has not solely been dominated by an industrial worker - capital divide, rather it has been a mixture of different hierarchical power relations where for example employers - employees (industry) and masters - subjects (agriculture) at times have had different agendas, on occasions similar interests.

The systemic principles

The reform in 1913 was primarily based in an insurance principle. Pensions were meant to reflect contributions paid and the predicted capital growth of the premium reserve funds. The question of subsistence, which focused on the need of a reform, was the basis of the political rhetoric, whilst the solution chosen, despite being universal, is a good example of an expertise driven process. Actuarial techniques were of prime interest, and the system aimed at being actuarially fair.

Connected to the universal group insurance was a means-tested supplementary part. The addition was necessary to achieve a momentum in lifting the elderly out of poverty since the insurance part was a long-term construction with a formation period of 50 years, ie. an individual's working-life span (Elmér, 1960).

The reform was an answer to several problems whereas some of them had clear bearing on the question of equality and class. The choice of a universal solution reflected the socioeconomic situation in Sweden at the time. A major part of the population was still living and working in the countryside and the share of free-holders among peasants was large. Even though the political discussion of public provisions had been started earlier and with focus on a solution towards industrial workers, the situation called for a reform answering to the demographic reality.

Given the formula of reform the existing income inequality in the labour market was upheld in retirement following an actuarial fairness argument. Even though the system was universal its fairness beyond obvious unequal outcomes can be questioned. The position of certain well off groups with personal or governmental retirement promises was strengthened by an opting out possibility (Berge, 1995). Women

were worse off than men (Werner, 2001), and by definition low income segments were paying a higher alternative cost than high income earners in respect of paid contributions effects on possible subsistence consumption. In such a setting rhetoric of actuarial fairness become class politics. The belief in and promotion of a technical solution producing the durability of unequal settings, such as the market outcome, is evidently an aspect of norm-ridden politics.

As Per Gunnar Edebalk has pointed out did the established group of promoters of poor-relief play a role in the process of pension reform, but their achievements were limited (1996). The means-tested supplement held some of the moral codes forwarded by them, eg. soberly behaviour, which of course hit only the low-income segments. But, the major change was that those in favour of social insurance gained influence. It was a great leap forward in social welfare organisation. One norm was thereby exchanged for another.

The pension system was revised already in the 1930's. No major alterations were made, but a clear reference to the existing system as a poor reliever of poverty among old people was made. The political norm was fully altered again by the introduction of a basic flat-rate pension in 1948. The investigation leading up to the new system did not, however, officially work with the flat-rate idea until very late in the process (Elmér, 1960).

A problem unsolved by the parliamentary decision in 1946 was the question of indexed pensions. A consumer price indexing (CPI) module was soon introduced. Without a system for balancing the value of pension amounts to either consumer prices or to wages (or both), redistributive effects may occur that are not anticipated. In a subsistence view, with pension levels just above what is needed to keep out of poverty, inflationary pressure would challenge the social policy intentions of the reform quickly. However, equally important is to find a solution that, on the one hand, does not spiral inflation and on the other, balances consumption abilities between retirees and the working population over time.

Indexation that produced questionable income distributions between the working and the retired population over time was one of the major criticisms in the 1970s and 80s against the supplementary pension reform of 1960. Over a business cycle it was obvious that the retirees had good times when others did not. The indexing system compensated for price increases, while the working population was dependent on wage negotiations, ie. the indexation was related to

consumer prices and did not reflect real wage growth. The idea reflected an ambition of a fixed consumption capacity. However, political decisions could lift or hold back the full collective. This was possible due to the so-called ”standard income unit” which worked as a filter between the CPI and the actual index ruling the levels of the pension system. The system therefore was not fully automatic. Rather it has been promoted as such. This became very clear in the 1990's when the parliament decided to not fully compensate for price increases as a part of the budgetary cut policies. It also showed what type of conditions was necessary for politicians to be able to use ”blame-avoidance” tactics in retrenchment (Ney, 2001; Pierson, 1994).

The reform of 1960 was passed through parliament with the least possible margin, one vote. It was a reform aiming at supplementing the basic pension, and to move the compensation level towards 60 % of former earnings. At the same time as the reform followed the pay-as-you-go principle (PAYG) it also revitalised the idea of more individual entitlements and a work performance related model. The choice of a PAYG principle made it possible to deliver already from the start without any pre-funding. However, the system was designed with reserve funds of a considerable size to maintain payments during demographical swings.

In the process of designing the reform a clear demarcation line was visible between those who preferred a fully publicly run PAYG system and those promoting a mandatory but privately organised premium reserve system. Some also forwarded a third possibility of an extended basic pension (Salminen, 1994; Molin, 1965). Historical explanations about this development, not least forces behind a compulsory supplementary scheme at all, emphasise class factors as important. Why should workers not get what the salaried employees received through collective agreements? It was obvious that existing solutions in the labour market were far from satisfying, especially regarding manual workers (Harrysson, 2000). The question of design and timing also exhibit a class divide where the growing share of salaried employees had their work conditions more standardised and resembling manual workers' conditions leading their political sympathies towards Social Democracy. See for example Evelyne Huber and John D. Stephens (2001) for an well-elaborated analysis of the labour movement influences in the Nordic welfare states.

An important part in the Social Democratic strategy was to involve the middle-class segments into the collective arrangements supporting the welfare state idea (Svensson, 1994). To be able to achieve this the pension system, among other things, had to be designed to meet the ”needs” of the middle-class. One need was to withhold the standard of living from before retirement (income compensation principle); another to reflect the different earning patterns between manual workers and salaried employees (15 best paid out of 30 years work rule).

The ATP-reform was the ”crowning” of the social insurance system. By 1962 all major social insurance fields covering sickness, occupational injury and retirement, but not unemployment, were organised under a common administrative and legislative umbrella, ”allmän försäkring” (social insurance).

The 1970s were characterised by slackened economic growth, oncoming retirees eligible of full supplementary pensions, and expected higher dependency ratios (number of retired as share of the number in the labour force). The combined system of reforms from 1948 and 1960 was under these circumstances observed as unstable and in need of change by the 1980s.

Administrative features, some remarks

The administration of the system from 1914 was organised using the post office network for contribution payments, and local community boards for the testing of people's entitlements. The contribution payments were divided into four amounts. This was of course a question of ability to handle the number of payments flowing in. With current technology the new Swedish system uses wage relative contributions leading to an unlimited amount of income layers limited only by the floor and ceiling in the pay-as-you-go system.

With a flat-rate pension as in the reform of 1948 the administration became quite straightforward. Mainly it was a question of making sure that a system for payroll tax collection was developed, and that the pension payments reached their destinations. It became more complicated with the introduction of the earnings-related supplementary scheme in 1960. Now there was a need for control of peoples' earnings. It was fulfilled through a financing system based in payroll taxes covering most of the population. Self-employed persons had the responsibility of their own payments, and for farmers there was an

opting out possibility in the 1960s. In connection to the implementation of the reform the former administrative body, Kungliga Pensionstyrelsen (Royal Pension Board), introduced in 1914, was substituted for Riksförsäkringsverket (RFV) (National Insurance Board) with responsibility for all social insurance except the union administered unemployment benefits. RFV conducted the necessary calculations to clarify individual entitlements following a technique based in a point system awarding a particular level of pension counted as a relative to a number of ”standard income units”. The system was connected to the same indexing principle as described earlier. Due to that all public pensions still were organised by the one and same administrative body, the organisation of pension payments, in the view of the recipient, was not affected by the introduction of the supplementary scheme. The pension funds (AP-funds) formed their own administrative bodies.

The pension system from 1960 underwent several more or less extensive changes up to the major reform in 1999. Then a model with numerous administrative bodies due to the system's premium reserve module was introduced.

Changing patterns of financing

Over the years the Swedish public pension system has been secured using different techniques for the financing of emerging pension rights. The model introduced with each major reform reflects what was practically possible, but also, and perhaps more important, what influential groups saw as preferable.

The reform introduced 1914 was in its universal part based on contributions paid individually at the post office. During the political reform process there were ideas of introducing a payroll tax, but due to the large share of small employers this option was left unused. However, people connected to the employers' organisations also disregarded the question of payroll taxes. The means-tested part was financed from general revenue. As a way of raising that revenue a tobacco tax was introduced. It was implemented along with the socialisation of the tobacco industry.

In 1936 the system was partly altered when a limited guaranteed pension was introduced parallel with the contributions based scheme and the means-tested supplement. This was a first step towards the basic pension system established in 1948, but the idea of keeping entitlements connected to contributions was strongly supported. Not

until the reform in 1948 were payroll taxes introduced to finance public pensions. Basically all interests favoured the solution, even the employers did since it was going to defuse the growing pressure from the trade unions for a labour market wide solution based on negotiations. The employers were not yet ready for such a step (Harrysson, 2000). However, the following ten years of activities were intense concerning the future development of the pension system. At least it was a question of financing responsibilities.

The introduced earnings-related system had a ceiling restricting the pension level but there were no restrictions on payment obligations. The payments were payroll based and administered by the employers. However, the status of ownership of the payments was not fully established apart from that they provided employee entitlements to a public supplementary pension. The question appeared vital in the mid-1990s when the new contribution based pension system, with a 50/50 split of contributions between employer and employee, was introduced. Who could claim the right to the funds behind the fees that paid for the former system? Were they to be seen as deferred wages, and therefor employee wages, or were they a straight payroll tax to be considered a cost for the employers? For a long while the question was not resolved, but with government involvement the question was settled to a 50/50 split.

The current system introduced in 1999

The pension reform implemented from 1999 introduced changes in many areas. Seen as technical changes the introduction of lifetime earnings as the benefit formula is a major change. It involves at least theoretically an altered redistribution pattern compared with the 15/30 rule in the old system. The redistribution, however, is probably more affected by the increased maximum benefits in the system, and as a consequence of shifting dividends from the premium reserve pension. Added to this of course a possibility of a wage pattern that will push wages downwards, as business wants, and a larger share of people dependent on the guarantee pension might follow.

The guarantee pension is not a basic pension given to everyone, as in the former system, but a ”topping up” model for those not earning enough to match the lowest acceptable level of income pension. For those eligible to the guarantee pension receive an amount comparable to the former system's basic pension inclusive housing benefits. This

is financed from general revenue, not from payroll taxes as in the former system.

At the same time as it is hard to forecast any redistributive effects of the changes, it is clear that it has produced a more individualistic system. This is evident in the premium reserve part where choice and luck has substituted social solidarity. Although it is most obvious in the transfer of the risk burden from the public to the individual, as could be expected when moving from a defined benefit to a defined contribution model. For those with lower income or no income at all, but who still fulfil the criteria for eligibility, the change does not make much difference in this perspective.

Another major redistributive factor new to the system is the real wage growth and inflation indexing principle. Compared to the former consumer price indexing system, which did not allow for other changes than in prices, the new one focus on three important aspects of long-term stability. First, it aims at balancing the pension levels to the real wage rate, ie. the relative purchasing power of the retired and the working population is kept stable. This means that the pension level is subject to changes during the time of retirement, from which follows that your accrued pension rights are based in a combination of contributions made during your working life, as well as the coming generations efforts while you are retired. Second, the system is designed to meet swings in growth in the economy (in GDP). Prolonged periods of slow growth, together with other pressures, may hit the ”brake” of the system. In short the brake affects a relative factor to which all pensions rights are multiplied. The factor may be changed to ease the financial burden on the system. As a consequence of such a possibility of change there is no fully guaranteed replacement rate in the income pension system. Third, it is constructed to meet demographic pressures. Due to that the population's age structure has changed following a long-term decrease in fertility combined with an increase in longevity and swings in the birth-rates, an increase in the dependency ratio (retired as share of working population) is produced. This will of course vary over time when large cohorts, eg. those born in the 1940s or 1960s, are phased out, but as a system it aims at producing a legitimate outcome at every moment. In other words, it is focusing on adequate justice on a ”day to day” basis.

Administration has become a new arena with the reformed system. Mainly this is an effect of the introduction of a premium reserve part where accredited fund managers, some 200 of them, compete for the capital. The market is strictly regulated by Premiepensionsmyn-

digheten (PPM), a public body with the responsibility of the premium reserve system. This means that the new system is administratively complicated due to all different agents involved. The public, however, refers to PPM in matters concerning their premium pension and choice of funds. In cases that refer to their income pension they need to contact the local social insurance offices (Försäkringskassan). Compared to the former system it is clearly a more complicated matter to see through and understand the new system.

The way of financing has changed too. The former system was fully financed from payroll taxes while the new system is a split formula where employees and employers pay half the contributions each, 9,25 percent each of gross wages. That is nearly two percentages less in total than earlier, 18,5 to 20,45, and is explained by that the guarantee pension is fully funded through general revenue, and early retirement payments taken out of the pension system. Out of the 18,5 percent 2,5 percentages are directed to the premium reserve module, 16 percent to the income pension system.

The private-public mix

The history of occupational as well as private pensions must be shortly discussed in the context of pension reform. In many comparative studies Sweden has stood out as a very well developed pensions regime (see Palme, 1990; Salminen, 1994). I would agree with that, but if occupational systems in the studied countries were included in the analysis it may have changed the comparative result. Both the German and the US systems are hard to discuss without these systems included, also the Nordic countries differ a great deal on this point. This leads us to a conclusion that Sweden has a well-developed public pension system, but not that pension entitlement necessarily are worse in countries using a less publicly organised system (see eg. Mesa-Lago, 2001 for an account on Latin America).

More significant and well-organised occupational systems were developed in Sweden in the first half of the 20th century. Several of them had trajectories way back, especially concerning sailors, military personnel and civil servants. Among railroad workers and in some parts of the industry, friendly societies were introduced, and in the more patriarchal parts of industry employer organised welfare systems were used (Harrysson, 1997; 2000). With the rise of a public pension system the two existed side by side, but they were evolving along different rationales. While the public system was universal and with

an ambition to lift people out of poverty, the occupational systems looked at clearly establishing who was eligible. Especially following the development of more generous and/or insurance like systems with portability and financially secured pensions rights these limitations were seen as important.
The history of occupational pensions shows a clear divide between salaried employees and manual workers. While large segments of the former, especially those within large companies, were provided with pension plans covering up to 60 percent of former wages, the latter had to a lot lesser extent any sort of pension promises. However, even among the workers it was clear that those industrial workers employed in large companies were favoured.

The development was slow, rather static among manual workers, all the way up to the introduction of the supplementary public pension scheme, ATP, in 1960. As a consequence of the introduced public system the occupational systems were changed and became supplementary in character. An important plan, ITP for industrial salaried employees, was changed into a guarantee of 70 percent compensation, or 10 percent on top of the public pension. For those with high wages the occupational part took on a relatively larger share due to the benefit ceiling in the public system. Manual workers did not achieve any negotiated extension until 12 years later, the so-called STP, which was a straight payment of 10 percent of final salary. From then on the labour market has been fully covered by pension plans, although administered differently across branches.

In the 1990s most occupational pension plans were renegotiated from a defined benefit to a defined contribution base. The only major plan still outside that frame is the private salaried employees ITP, whose unions are struggling to maintain a defined benefit system in a hostile employer environment.

For everyone who retires from the labour market the mix of the public and occupational systems play a vital role. For most the occupational part stop at a 10 percent sweetener, but for those with higher salaries it provides a standard security not possible only through the public system. However, by the transforming of the occupational plans into defined contribution based plans the risks have been transferred from the employer to the employee. Therefor it is not a standard security any longer, but a capital investment project.

For those with resources it is possible to invest in individual private pension plans. Using tax deductions up to a certain level the

government has for a long period of time favoured such plans. This way of subsidising retirement savings has a clear regressive redistribution profile.

Equality, subsistence and class mobilisation

Let us start with the question of pensions and equality of what?

My answer would, in a normative manner, be that it is the right of all citizens in a democratic welfare community to a retirement income above subsistence level. None should find a need of begging for their living, neither be burdened by a stigma due to a dependency on welfare transfers. However, this is my understanding of the basic values behind the Swedish public pension systems up to now.

The answer to the initial question has over time become blurred or been moved to the background, notwithstanding that the answer is still the same. Paul Pierson (2001) would in a provocative manner call the blurring process one of obfuscation, deliberate confusion, wherein powerful groups maintain and mobilise resources to limit their losses or to gain influence. This is specifically the case in times of retrenchment, but visible also in welfare build-up processes. What would such a process look like? Well, let us conclude that nothing of what has been proclaimed as technically new in pension reform is really that new, apart, perhaps, from the universal strategy in 1914.

Views held by different political or professional interests have had a quite stable structure and support. Conservative and liberal political groups together with business promote pre-funded insurance systems that are individually based and privately run. Environmentalists as well as agricultural economic and political interests prefer a basic pension paid from general revenue. Social Democrats and the trade unions hold a view of a collective earnings-related system based on a pay-as-you-go principle. In this sense it is not a question of where from reform pressure has come, but in what circumstances certain groups gain influence to promote their particular ideas.

Power resources explain the development of certain relational particularities, not the details themselves. Further, it is not what is said, but what is actually listen to, that reflects the relative distribution of influence in such a development. How did we get convinced of a certain direction of pension reform in the 1990s? Or who listened to what?

Some critical moments in pension reform

The growth of the welfare state in Sweden was accompanied by a full employment society and governments devoted to active labour market policies to keep people involved in wage labouring. The welfare organisation was in most respects concerned with fostering new working generations and respectfully taking care of those who had serviced. Reciprocity worked on an ideological level of solidarity between those who were fit and those who were not.

By the late 1960s and early 1970s economic growth was sluggish. The world market was hit severely by inflation and stagnation when the US let their currency afloat. Increased oil prices triggered an upcoming structural crisis in the international economy. Most western nations declared budget deficits and rising unemployment. It was an economic environment open to criticisms and challenges of the welfare state.

The welfare state setting was criticised from both the political left and right. Left wing criticism was clinching the welfare arrangements from a Marxist view stressing governmental support of business values, or just as a device of ensuring workers in the capitalist system. From the right the criticism stressed the welfare state as obstructing private life and choice. Not least the growing need of tax increases to finance the system rendered in reactions.

It takes time to make welfare organisations change. Path dependent structures, bureaucratic routines, political struggles in conflicting interests, among other things make the process slow and unpredictable. To promoters of change it is important to move beyond the point where a withdrawal is possible or at least likely. Obfuscation comes in play. Simply make people believe one thing and do another. Make people believe some small changes are necessary, but do not present the full picture of long-term consequences, such as further ”necessary” changes. Make the process complicated and hard to se through. Keep the agenda hidden.

Some structures are stronger than others are. Pension systems is one of those. Pension systems are long-term arrangements based in solidarity between generations. There are two basic ways of interpreting the logic of solidarity. First: ”I pay your way now (old to young) and you pay my way later (young to old)”. This is the logic of a ”pay-as-you-go” system. It can be said to be an impersonalised, or socialised, version of intra-family redistribution in pre-industrialised societies. Second: ”I pay my own way through savings and inheri-

tance, you pay yours." This is the logic of a funded system. It is based in property rights, and resembles in large arguments for a free market economy.

There are few pension systems fully applicable to any of the two. However, as existent structures of thought, not least ideologically, they provide understanding of what way a system is heading. It is also clear that both ways are strongly dependent on the next generation's acceptance of the logic and ability to produce resources to redistribute. Basically, both are extremely dependent on that people work and share the results of their efforts. However, the re-distributive logic is clearly different.

If a system entitle to pensions based in individual property rights, disputable as civil rights in court, it is obvious that a change that would challenge these rights is hard to achieve whatsoever necessary. Even with a system as the former Swedish one, which produced pension rights as social rights rather than property rights, it proved hard to make any dramatic changes that diminished individual returns from the system. Not least since the mature system has been quite successful in keeping most of the retired population well above poverty. Among influential political groups it also held a strong position as a milestone of welfare state creation, and whatever problems the system had, and many were known and well documented, it would take unpopular political decisions to change.

In the theoretical view gathered from Jamrozik and Nocella (1998) the way the problem was met can be referred to as a move to an administrative sphere. In the move the question left the conceptual level of ideas and turned into technique. The political criticism, from right and left, had to turn into applicable proposals for politicians to act upon, and the propositions had to be in line with the normative structure held by influential groups at the time.

When it comes to pensions the technical methods can be divided into two: actuarial and accounting/auditing methods. None of these can produce any explanations to questions of why, how, when, who or where a reform process takes place. However, that is not the idea. They are often technically advanced and serve well as tools of obfuscation (Pierson, 1994). These methods produce answers dependent on what information is available for calculation. Actuarial methods are as a mathematical exercise objective, but the choice of what material is to be used is of course not (Hacking, 1990). Actuaries do not predict preferable futures, but countable turnouts. Their professional status relies on their ability of counting correctly. Auditing is some-

what different. An auditor's professional position is secured by his membership of an association, which have a system of rules of conduct, ie. ethical principles (Power, 1999). The ethic is used to provide confidence, as far as to be legitimise the right to the design of guidelines for the auditing process inside the association itself. The principle of that the auditor does not choose sides is important to withhold. Auditors, as actuaries, do not predict preferable futures they make short-term historical reviews based on principles they have created themselves. The result of an auditing process is of course not an objective outline of the position of a firm, a soccer club, a part of the welfare state, but a result fully dependent on the principles chosen to direct the auditing process. Their professional status relies on their ability of monopolising the right to set these principles.

If pension reform is referred to these professions, only those with skills to interpret their results are able to participate in the process. This would mean an efficient way to keep others, such as the common citizens, out. While some influential groups feed these professions with information, other groups, with other agendas use the information interpreted in their preferred way.

During the 1980s Social Democratic governments deregulated important parts of the economy in a similar vein as in many other nations, eg. New Zealand (Kelsey, 1996; O'Brien, 1998). The agenda for these changes was unclear at the time, but clearly driven by the Treasury. Focus moved to monetary stability with an independent central bank, supply-side economics etc. At the same time other parts of the Government worked in directions of a continued welfare state development. But with major changes in the taxation system and a reinforced focus on individual choice and eagerness of privatising public utilities, welfare state retrenchment was first target. The succeeding Conservative government opened for the ”upper class” to become visible on the political front stage.

The complete neo-liberal agenda was presented. It appeared as if many of the earlier steps taken ”opened” the field. With the privatising of public services people should be free to choose, receive a better coverage, lessen the distortions in the labour market, and promote competition. In a class or ”a less fortunate segment” perspective these arguments would be translated to choice and better coverage for those with resources, less security in the workplace and relatively lower wages for those without. Furthermore, in a pension coverage perspective this would mean higher individual risks and less chance to

be part of an occupational system due to the latter's entitlement criteria.

With a crisis in public finances at hand things that earlier were blocked out were suddenly possible. A parliamentarian group consisting of representatives from most political parties was formed to find a solution to the public pension problem. This group differed to earlier ones with similar political importance by being very closed to outside influences. Its agenda was to fulfil the task of moving a reformed pension system through the parliament before next election. The process was one of finding a compromise that all involved could meet without losing face, so-called blame avoidance (Pierson, 1994). The Left party had to step out of the group since they did not agree with the agenda (Sandh, 2001).

> The idea that structural or radical pension reform is in some fundamental sense incompatible with 'normal' democratic politics also seems to play out empirically. A cursory glance at pension reform efforts in Europe over the past two decades shows that radical reforms tend to coincide with incisive changes in political structures. (Ney, 2001, p2)

The political process of pension reform in Sweden was one that blocked transparency. It aimed at as soon as possible get reform on the way. It is also obvious that members of the group worked hard to promote their idea of individualisation, but also that they met severe resistance from others (Sandh, 2001; Palme, 2001). The system proposed was one stressing means rather than ends, and rather complex means. The group presented a solution to the major problem of indexation and in some respect demographical swings, but why the increased individualisation, and why public involvement in speculation through the premium reserve part?

Legitimacy, equality and class - a normative final reflection

An interesting aspect of this reform is how it was legitimised. In a Rawlsian perspective, highly simplified, a justified distribution is one that as a minimum criterion makes the weakest better off. Notwithstanding that the reform does that. For those with only the guarantee level it is probably a better outcome than from the former system. It is also clear that those with plenty of resources are better off due to a risen ceiling and lowered fees, but mainly receiving their retirement

income from other sources. Is that enough to motivate that some 80 percent of the working population are worse off? The question is even more accentuated when referred to the transition rules that have been instated covering citizens born 1937 - 1954. Viewing the older system as more generous than the new, these rules favour a generation that:

- Historically has been favoured by subsidised private capital formation through housing policies and tax deductions.
- Clearly has been the best off in tax reform, with lowered capital and income taxation.

However, these regressive distributive effects do not spread even among a generation. There are of course large segments that have not had the financial ability to create this capital build up despite favourable conditions. Transition rules in pension reform aims at reassuring people that have built up pension rights in the existing system that they shall not lose. This concerns most often only them near retirement, but as in the Swedish case a quite extensive share of the working population. The rules also have the ambition of maintaining trust in the Government.

My description of a favoured generation can most probably be contradicted, but let us say that it is not. It is obvious this far that those covered by the old system are better off than those under the new regime are. How does my argument affect the legitimacy of the political process? There are few signs of that people are convinced that the new system is the right way to go. Mainly it seems as if people have to coop with it since it has been instated using the power of representative democracy. This has negatively affected the trust in politicians. Since politicians are representing the State, the legitimacy of the State is under threat to be severely damaged. This far though, it seems as if the faith in democracy and a state organised provision of welfare services and social protection still is strong, but fading (Svallfors, 2003; Kumlin & Rothstein, 2003).

This process has been affected by other changes than in the pension system. Due to the structure of the political system with highly independent local communities, changes appear at different pace around the country. Sweden is not one welfare state, but 289. In each and very local council actions have been fragmented by decentralisation as well as auditing processes implementing business ideas into public administration. Eg. a school may be closed down because it cannot pay the rent that the councils own housing company

set based on market valuation of their buildings. Rather ridiculous I must add.

However, in an environment where a lot of more or less simultaneous changes alter the way people relate to the welfare state, it is not possible for anyone to have a clear view of the effects of made changes. The speed of change, the aim at basic values, and a consistent lack of interest in active labour market policies to provide work opportunities, can only be met and perhaps appreciated by those with resources to fund alternative solutions. In a subsistence view it can only be considered as a major neglect of needs to make ends meet. I, without more proof than any other foreseeing the future, would believe that inequality in financial resources on an individual level as well as between social classes is going to increase and prevail through market related dependency structures. The possibility of that these structures will reach all the way into the basics of democratic control is apparent seen in a historical perspective of economically unequal societies.

Finally, the design of the current Swedish pension system enhances this process in at least two ways. First, by the intensified individualisation promoted in the system it threatens the basic glue of solidarity in the Swedish society, which it is set to provide for. Second, the introduction of a premium reserve part creates a dual tension that clashes with other important values. The obvious speculation ingredient in the premium reserve module contradicts the idea of providing a secure retirement. It is also questionable if the public system at all should promote such actions. But of course, sarcastically, who cares when someone loses as long as it is not I? This is the moral of neo-liberal style individualism in a nutshell. Beware of that!

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Motivations, Opportunities and Constraints

Voluntary labour in women's refuges and crisis centres

Lesley McMillan

The feminist movement of the 1960s and '70s made the claim that 'the personal is political' and demanded a re-examination of women's daily lives. More specifically where violence was concerned, the movement demanded that domestic violence no longer be considered something that women were responsible for, and that rape and sexual assault no longer be viewed as a sex crime with women partly to blame (Amir, 1971). Rather, the women's movement asserted that power was a central issue in violence against women and that sexual and domestic violence both reflect and determine gendered social structures. The distinction between the public and the private was challenged as well as the conduct of agencies in relation to sexual assault survivors and the reluctance of state agencies to intervene in 'domestic' situations. The movement aimed to have the under-reporting and high prevalence of male violence against women recognised, along with the acknowledgement that it can affect women at any stage of their lives and take many forms including: physical; psychological; economic; and/or sexual abuse. Overall, the aim was to have violence redefined as an issue of power that is both caused by and perpetuates gender inequality, recognising its systemic nature and pervasiveness and working to achieve an end to this violence. The feminist response took two forms: political campaigning and alternative welfare provision in the form of refuges and crisis centres.

Prevalence of violence against women

Women face a disproportionately high risk of domestic and sexual violence compared to men. Kessler et al (1995) found that lifetime prevalence rates of rape for women were 9.2%, and rates of molestation were 12.3%. The extent of male violence against women is notoriously difficult to measure. It is widely accepted that official statistics massively underestimate the amount of violence that occurs. Women do not often report assaults to the police, especially if their abuser is known to them, which is most often the case (Koss & Heslet,

1992; Koss, 1993), because they fear they will not be taken seriously or believed, and because they fear further violence from their abuser. The secondary victimisation experienced by women in the criminal justice system also serves to deter women from reporting sexual and domestic violence (Byrne & Kilpatrick, 1999; Chesney-Lind, 1999; Hudson, 1998). Furthermore, the reluctance of the police to intervene in what are regarded as 'domestics' is also a contributing factor in the 'hidden' nature of violence against women (Dobash & Dobash, 1980; Hanmer & Saunders, 1984; Hanmer, Radford & Stanko eds. 1989).

Research studies that have tried to estimate the prevalence of domestic violence have varied widely in their estimates from under 1% of the female population (British Crime Survey, 2000) to approximately 1 in 10 of the adult female population (Stanko et al, 1998). These variations can be explained by the differing methodologies and definitions of domestic violence. Lifetime prevalence rates for women experiencing domestic violence tend to cluster closer together, suggesting that 1 in 4 adult women will experience domestic violence by a partner or ex-partner at some point in their lives (Dominy & Radford, 1996; Henderson, 1997; McGibbon et al, 1989). The 'Day to Count' research (Stanko, 2000) estimates that a domestic violence incident occurs in the UK every 6 to 20 seconds.

The available data on prevalence rates for rape and sexual assault is also limited. Russell's (1982; 1984) research with a random sample of women in the US found that 44% of women had been subjected to rape or attempted rape during their lifetime. *The Progress of Nations* (UNICEF, 1997) states that between 1 in 5 and 1 in 7 women will experience rape in their life-time, and the UN Population Fund (1997) estimates that one woman in the US is raped every 6 minutes. In the UK between 1977 and 1997 the number of women reporting rape increased by over 500%, but the conviction rate fell from 33% in 1977 to 7.5% in 1999 (Home Office, 1999).

Refuges & rape crisis centres

The feminist response took two forms: political campaigns on issues of violence; and alternative welfare provision in the form of refuges and crisis centres aimed at empowering women and challenging male domination (Charles, 2000; Lovenduski & Randall, 1993). The battered women's movement and the rape crisis movement were radical feminist branches of the women's movement that emerged as

part of this response (Collins et al, 1989; Black, 1994; Matthews, 1994; Reinelt, 1994).

The first refuge for battered women in the UK opened in London in 1972 (Coote & Campbell, 1987; Kelly, 1988) and the national network now known as Women's Aid began in 1975. The first rape crisis centre opened in London in 1976 (Rape Crisis Federation, 2001). In Sweden, the women's movement had intially been mobilised around labour issues so came to the issue of violence slightly later than the UK. In 1977 Gothenburg was the first municipality to grant space for a women's centre (Corrin, 1999), and the first shelters for battered women opened in Gothenburg and Stockholm in 1978 (Eduards, 1992). Shelters for battered women are now clustered under two national networks, Riksorganisationen för Kvinnojourer i Sverige (ROKS) and SKR.

As the number of centres increased strategies were communicated through the wider women's liberation movement and as a result centres embodied assumptions about ideology and goals and were therefore relatively uniform in character (Gornick, 1985). Given that the majority of centres received little or no government support, they were free to explore for themselves new ways of communicating that challenged, at least internally, the bureaucratic values and structures of power that dominate in our society (Reinelt, 1994). The majority of centres chose collective forms of organisation in order to challenge the social paradigm of traditionally organised hierarchies where equity is not a concern (Matthews, 1994). Centres that developed in the 1970s were generally small, unaffiliated groups, offering services to adult female survivors of violence. Services that were delivered were non-medical, low-cost and short term, and delivered by volunteer women who were often survivors of violence themselves. Centres usually undertook community education for lay audiences and aimed to change procedures in, and monitor, professional agencies dealing with survivors of violence.

Emergence of the women's movement

The features discussed in the preceding section are often considered to be characteristic of the 'original model' of a refuge or crisis centre. Indeed, these features characterised such organisations in many western states. However, although the women's movement is global, ”within each country the movement follows a distinctive course, developing structures and agendas in response to local circumstances” (Margolis, 1993:379/380); different types of state generate different types of collective action (Birnbaum, 1988). At the time of the emergence of second wave feminism, the political terrain in Sweden and the UK was very different; therefore the movement took distinct forms and has taken distinct trajectories since.

In Sweden in the 1970s, the state made a commitment to gender equity which included women's right to be free from violence (Eliasson & Lundy, 1999). The idea that both women and men should have equal rights and responsibilities in society had been institutionalised and women's traditional economic dependency upon men had to a large degree been transferred to the state (Hernes, 1987). Therefore, within the Swedish welfare state, an individual model of social policy had developed (Kaplan, 1992; Sainsbury, 1994), and significant legislation and policy changes took place despite the absence of a widespread feminist movement (Kaplan, 1992). In fact, the advanced nature of Swedish reform is cited as an explanation for the lack of a mass feminist movement in Sweden (Gelb, 1989; Kaplan, 1992). The need for special organising by women was not seen as urgent, and it was perceived that change would be more readily achieved through existing political channels rather than working from outside the system. As a result, most of the shelters for survivors of violence in Sweden conformed to the 'philanthropy model', with the emphasis mostly on helping without any conscious feminist emphasis (Dobash & Dobash, 1991). Furthermore, feminism has been resisted in Sweden because it would polarise women and men (Eliasson & Lundy, 1999), so women were neither encouraged to nor comfortable with identifying as openly feminist.

The situation in the UK was rather different. Social and welfare policy has historically been based upon the presumed economic dependence of women on their husbands (Charles, 2000), and at the same time the British state has been reluctant to intervene in the family (Lewis, 1992).

Gelb (1989) argues that the UK state is not very open to interest groups because the party system remains strong with politics still framed in relation to class issues. Therefore, the women's movement focussed on autonomous organising rather than setting about influencing a state closed to external pressures, a strategy that was also influenced by the radical and socialist feminist perspective that has characterised the UK movement.

It is clear that the distinct paths taken by the women's movement in different countries, and with it their work to stop violence against women, largely reflect historical differences in the struggle for gender equality and the social condition of women in each country (Eliasson & Lundy, 1999). The nature of the movement and the form it takes is also significant, and impacts upon, the motivations of those involved in the movement's refuges and crisis centres.

Motivations for volunteering

The use of women's voluntary labour in feminist organisations is a controversial one; because women are not remunerated for their efforts, therefore it can be seen as perpetuating women's oppression. Nonetheless, refuges and crisis centres rely heavily upon it for their survival. Given that volunteers give of their time for no financial reward, what then are their motivations for doing so?

Literature indicates that there are likely to be a number of motivations for people's involvement in a movement (Black et al, 1994; Cnaan & Goldberg-Glen, 1991; Gluck, 1979; Rubin & Thorelli, 1984; Smith, 1982; Wiche & Isenhour, 1977). Indeed, social exchange theory has frequently been used to address this question. This refers to the actions of an individual being motivated by the returns those actions are expected to bring, although these may not be tangible or stipulated in advance (Blau, 1964). Altruism is also often cited as a motivating factor, with Sills (1957) making the distinction between 'altruism' (other-oriented), and 'egoism' (self-oriented) motives. Kidd (1977) has also distinguished between 'intrinsic' motives and 'extrinsic' motives. Some scholars, for example Pittman et al (1984), feel social exchange theory is particularly well equipped for the study of women who participate in the women-specific organisations of the women's movement, stating that ”attracting and retaining workers, paid or volunteer, revolves around the worker's estimation of the intrinsic and extrinsic benefits of the job” (Pittman et al, 1984, p33). Obershall

(1973) also used social exchange theory by developing a risk/reward ratio for estimating the likelihood of joining a social movement.

Evidence of the importance of the political dimension in social movement participation is provided by Black et al (1994), who studied a sample of movement participants in rape crisis centres and battered women's shelters in Texas. They hypothesised that the greater the influence of political motivations for social movement involvement, the greater the perceived acceptance of participants would be – in other words, the greater would be their sense of collective identity. The study found that psychic (for example, feeling good about one's self as a consequence of helping others) and altruistic (wanting to help others for its own sake) motivations were the strongest, but that political motivations such as 'helping to stop the problem of rape and battering' were also significant. The findings of the study suggest that the movement participants studied have altruistic or psychic motivations for becoming involved but that feminist political biases compel them to do so in women's movement organisations such as rape crisis centres and refuges for battered women. Blanton (1981) also indicates the importance of collective identity for movement participants, indicating that members may be seeking not only a work setting or vehicle for social change, but also an experience of 'sisterhood' and personal acceptance." (Blanton, 1981 cited in Riger, 1984).

It is hypothesised for this research that there are likely to be multiple motives for volunteering in refuges and crisis centres, and that altruistic and political motivations, as well as being a survivor of violence, are likely to be significant contributing factors to the decision to volunteer.

Research methods

The research sought to address these issues in the context of voluntary labour in refuges and crisis centres in Sweden and the UK, in order to establish women's motivations for becoming involved and their experience of work. The research used methodological triangulation and involved questionnaires and in-depth interviews with women working in refuges and crisis centres in each country. A systematic stratified random sample was used to identify organisations and participants and a total of 675 questionnaires were administered, and 25 interviews completed. The study had a particularly high response

rate; 82% (74) of the 90 organisations contacted participated, and 81% (549) of the 675 individuals contacted participated.

Reliance on volunteers

The research found that refuges and crisis centres in both Sweden and the UK still rely heavily on voluntary labour. The number of volunteer workers reported by organisations ranged from zero to forty, the majority of whom provided their labour on a part-time basis. A total of 92.5% of UK organisations used volunteer workers and all the Swedish organisations reported that women worked on a voluntary basis in their centre. There were notable differences in the extent to which organisations in each country relied on voluntary labour. Swedish organisations were more likely to report higher reliance on voluntary labour and reported lower numbers of paid workers.

There were no distinctive differences between the two national organisations of battered women's shelters (ROKS and SKR) in Sweden, however there were notable differences between Rape Crisis and Women's Aid in the UK. The difference between Sweden and the UK can be explained by the distinctive position of Women's Aid which reported a far higher number of paid workers, and therefore a lower reliance on voluntary labour. Figure 1 clearly illustrates the difference between Women's Aid, compared to Rape Crisis, ROKS and SKR.

Figure 1: Number of Paid Workers by National Organisation

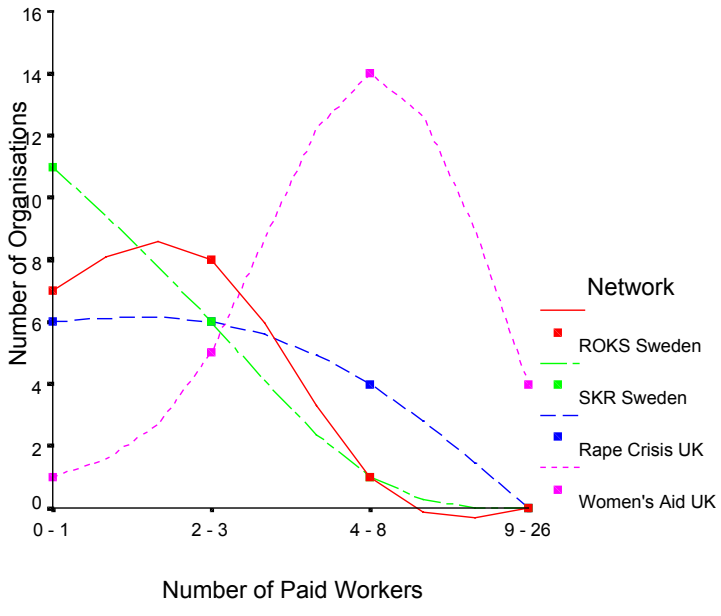
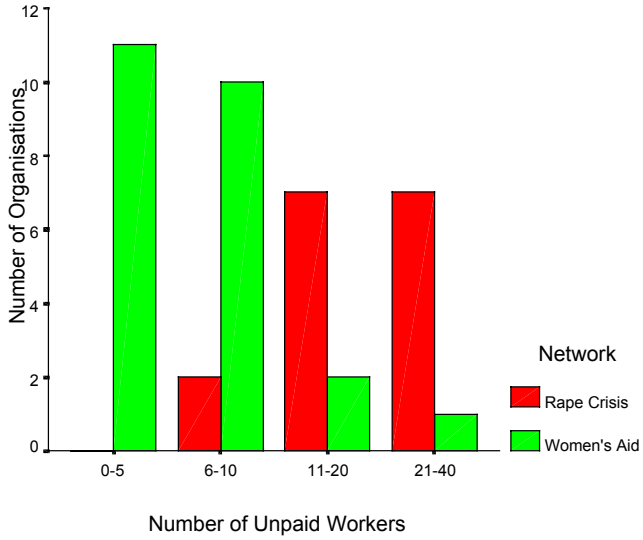


Figure 2 illustrates the difference between Women's Aid and Rape Crisis in terms of the number of unpaid workers. Therefore, reliance on voluntary labour was not uniform, but differences in organisations' income and therefore ability to employ staff influenced the number of unpaid workers in an organisation. Having said this, Women's Aid still relied upon voluntary labour for its survival, but not to the extent of the other organisations.

Figure 2: Number of Unpaid Workers By UK National Organisation



Who volunteers?

The research found that those volunteering in refuges and crisis centres in Sweden and the UK are exclusively women. This is in line with the feminist history and principles of these organisations. Another finding of the research was that women who volunteer were likely to be involved in paid employment in addition to their voluntary work. Therefore, those giving their labour for no financial reward were increasing their workload and burden rather than pursuing voluntary work as an alternative to paid work. Although this was the case for workers in both Sweden and the UK, those volunteers in paid employment in the UK were more likely to be working full-time and those in Sweden part-time.

Literature concerning women's anti-violence organisations often discusses the influx of social service professionals to such work (Matthews, 1994; Reinelt, 1994). This research found that 134(24%) of those working in anti-violence organisations in Sweden and the UK

were employed in paid work in a caring, therapeutic or human service occupation. It should be noted that women are often over-represented in care and social service work since their participation in the public sphere mirrors their role in the private sphere where they assume most responsibility for dependants. However, interview respondents indicated over the last decade there had been a greater influx of women into refuges and crisis centres who were working in social service professional careers than they had previously had:

> We're far more likely to get social workers, psychologists, professional counsellors and so on wanting to join us than we are lawyers and accountants. Though we get some of them too! I think they're tuned into the helping idea and see themselves as having professional expertise to offer. (Women's Aid Worker, Northern Ireland)

The attitudes of other workers towards the influx of social service professionals as volunteers differed between respondents in each country. The response from Swedish workers was overwhelmingly positive which offers support for the argument that a charitable approach, rather than a radical political one, has influenced the movement. There were a greater number of women in Sweden (89 of 134) employed as social service professionals than was the case in the UK, with Swedish workers accounting for approximately two thirds of this group.

> It's not enough to only be here. We need to have the skill to help them and a lot of them need the psychological treatment. We need more of those women here. (ROKS Worker, Sweden)

UK workers were more likely to express some level of concern about the influx of social service professionals and the risk that political understandings and approaches to violence become less explicit and activities are concentrated on the needs of the individual woman. The following comments illustrate these sentiments:

> Those skills are welcomed, but all skills are, and they're all important. (Women's Aid Worker, Scotland)

> It's a difficult one, because some women really need that psychological care, but I do worry that it becomes about fixing the

particular woman and not about helping all women. (Women's Aid Worker, Northern Ireland)

Why do they volunteer?

The research found, and as literature suggests (Black et al, 1994; Gidron, 1984), that altruistic motivations and perceived psychic benefits were significant in the decision of women to volunteer. Altruistic motivations, for example the desire to help others, were often cited by respondents in both the questionnaire based and interview based elements of the research. A total of 78% (428) of respondents cited altruistic motivations as significant in their decision to pursue refuge or crisis work. The following questionnaire responses are representative of this:

A desire to make a difference, albeit small!
To help others.
To make a difference and help people.

For many women altruistic motivations were also underpinned by the perceived psychic benefits of pursuing anti-violence work. The majority (385/90%) of those who cited altruistic motivations indicated that the psychic and emotional benefits that were forthcoming as a result, for example feeling good about one's self, also motivated them to do this work. On the whole, women indicated that their work, in particular helping women and children, gave them a tremendous sense of satisfaction. For example:

When I see women change their lives around completely I just grin with pride – pride in myself and pride in them. (Written Questionnaire Response)

Altruistic motivations for refuge and crisis work were particularly strong for those Swedish workers interviewed. It was evident that there was a charitable element to their work and their motivations to begin and continue refuge and crisis work had stemmed partly from desire to philanthropic work. This is not to suggest a feminist approach is lacking, but that the desire to help people who found themselves in difficult positions was particularly strong.

In line with the research of Black et al (1994), the study found that political motivations were significant for women when deciding to volunteer in refuges or crisis centres.

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