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Activation Policies From a Gender-Sensible Citizenship Perspective: A Tentative Analytical Framework

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Summary

The paper develops a tentative analytical framework for systematically comparing different types of activation policies with regard to their implications for the welfare triangle between state-market-family and gender inequalities. Starting point is the realization that the meanwhile universal "activation paradigm" of labour market policies, i.e. the (re-)commodification of all adults able to work, affects the welfare production of families as it conflicts with the unpaid care work for dependants performed primarily by women. From a theoretical background of social citizenship rights, it is assumed that this unpaid care work can neither be fully commodified and de-familised, nor that this is desirable for society. Rather, the notion of an inclusive social citizenship developed by feminist welfare state research includes both earning and caring responsibilities of all citizens as a basis for recognition and subsistence. Two main research questions arising from this inherent tension of activation policies are tackled in this paper: *First*, how do the different country variants of activation policies address this tension and what are the interdependencies between national welfare and gender regimes and the specific activation type? *Second*, what are the outcomes of this interplay in terms of social inequality especially with regard to gender and class, and regarding the notion of inclusive social citizenship?

To operationalise these questions for comparative research, a tentative analytical framework is proposed, developing seven relevant dimensions and respective indicators to measure or assess them. This analytical tool has been applied in a case study of German activation policies, whose central findings are summarised, drawing conclusions in the light of comparative research.

Zusammenfassung

Das Papier entwickelt einen vorläufigen Analyserahmen für den systematischen Vergleich unterschiedlicher Typen von Aktivierungspolitiken im Hinblick auf ihre Implikationen für das Wohlfahrtsdreieck zwischen Staat-Markt-Familie und Geschlechterungleichheiten. Ausgangspunkt ist die Erkenntnis, dass das inzwischen universell gültige arbeitsmarktpolitische „Aktivierungsparadigma", d. h. die (Re-)Kommodifizierung aller erwerbsfähigen Bürgerinnen und Bürger, die Wohlfahrtsproduktion der Familie insofern betrifft als es mit der vor allem von Frauen unbezahlt geleisteten Sorgearbeit für Angehörige kollidiert. Auf dem theoretischen Hintergrund sozialer BürgerInnenrechte wird angenommen, dass diese unbezahlte Sorgearbeit weder vollständig kommodifiziert und de-familialisiert werden kann, noch dass dies gesellschaftlich wünschenswert ist. Vielmehr bedeutet die Idee einer „inklusiven sozialen Staatsbürgerschaft" wie sie in der feministischen Wohlfahrtsstaatsforschung entwickelt wurde, dass sie sowohl Erwerbs- als auch Sorgeverantwortung aller Bürger und Bürgerinnen als Basis für Anerkennung und Subsistenzrechte einschließt. Ausgehend von diesem dem Aktivierungsparadigma inhärenten Spannungsverhältnis werden zwei zentrale For-

schungsfragen formuliert: *Erstens*, wie beantworten die unterschiedlichen Ländervarianten von Aktivierungspolitik dieses Spannungsverhältnis und welche Interdependenzen bestehen zwischen Wohlfahrts- und Gender-Regimen und dem spezifischen Aktivierungstyp? *Zweitens*, was sind die Ergebnisse dieses Zusammenspiels im Hinblick auf soziale Ungleichheiten besonders von Geschlecht und Klasse und hinsichtlich der Idee sozial inklusiver Staatsbürgerschaft?

Um diese Fragen für die vergleichende Forschung zu operationalisieren, wird ein vorläufiger Analyserahmen vorgeschlagen, der sieben relevante Dimensionen und entsprechende Indikatoren für deren Messung und Bewertung enthält. Dieses Analyseinstrument wurde für eine Fallstudie deutscher Aktivierungspolitik angewendet, deren zentrale Befunde im Licht vergleichender Forschung diskutiert werden.

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1 Introduction

The widespread European paradigm shift to "activating" labour market policies as a core part of welfare state restructuring is based on the concept of the individual adult worker model, the (re-)commodification of every adult worker citizen which is supposed to enhance employment growth and reduce unemployment rates. However, despite such a seemingly universal political strategy of "activation", research has revealed that there are different national types of "activating" labour market policies (ALMP), influenced by and embedded in the respective institutional settings of welfare state regimes, producing different outcomes (Andersen et al. 2005; Barbier/Fargion 2004; Barbier/Ludwig-Mayerhofer 2004; Clegg 2007; Serrano Pascual/Magnusson 2007; van Berkel/Valkenburg 2007b). What has also been reflected so far, though not too often and not exhaustively, is the influence of the activation paradigm on gender relations and in particular on changing responsibilities for informal care work within different national settings (Knijn/Ostner 2002; Lewis 2002; Saraceno 2007; Siim 2005; Skevik 2005). This issue is highly relevant as the activation idea affects the classical triangle of welfare production between state–market–family: The degree of labour market participation of women, notably mothers, is last but not least a dependent variable of institutional arrangements around informal care work in the family, including available care infrastructure, fiscal incentives and benefits for families etc., strongly influenced by cultural norms of gender relations and family values.[1] The individualised concept of activation has therefore a considerable impact on these arrangements as it is based on certain preconditions. As these conditions vary according to welfare state-specific patterns, the starting points for ALMP were quite different throughout Europe. There is a wide variety of gender regimes[2], ranging from an already more or less realised adult worker model with dual full-time earners and mainly publicly organised caring (e.g. Denmark), to strong or moderate breadwinner models of a male full-time earner and a female part-time earner and carer, among them different sub-types depending on the

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

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

role of the State and the market respectively (e.g. Netherlands, Germany, UK). However, what seems to be a still underdeveloped field of research are, *first*, the quite complex *interdependencies* between those institutional and cultural contexts shaping gender relations in a society, and the specific country variant of activating labour market policies, and, *second,* the different *outcomes* of this interplay in terms of social inequality especially with regard to gender and class. The paper attempts to tackle these issues, dealing with two main *research questions*:

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

Presumably, trends of commodification and de-familisation induced by the "activation turn" shift responsibilities from the State to the market, and from the family to the individual – but will such a convergent shift hold true against different national starting points and path-dependencies?

Turning the research perspective around, what are the consequences of different social and political constellations within different welfare/gender regimes for the specific activation type of each country, its consistency and the interplay of activating labour market policies with interrelated fields like family policy?

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

Here the question is, whether or to what extent the individualising activation paradigm in its welfare state-specific profile might have 'gender equalising' effects, e.g. by creating a better labour market access for women/mothers, or whether it might in contrast aggravate existing gender inequalities on the labour markets and in the domestic sphere of informal care work, e.g. pushing women into bad quality jobs and tightening the conditions of de-commodification.

Hence this paper addresses both the *methodological question* of how to assess the success and failure of "activation", distinguishing between sexes and the earning-caring roles in society, and the question of the *outcomes* of activation policies regarding gender, class segregation and the target groups of "activation". The paper first pinpoints the posed issues within the theoretical context around the discourse on social citizenship, illustrated by some findings from country studies (part 2), before proposing a tentative analytical framework to research these questions comparatively (part 3). In the fourth part of the paper, we sum up the central findings of a case study on the German activation type in which this analytical framework has been applied, based on first empirical results of contextualised evaluation studies and labour market statistics. In the last sections (part 5), some conclusions are drawn from these works and remaining research gaps are highlighted.

2 Theoretical context: activation and gendered social citizenship

The paper refers to the debate around the impact of ALMP upon citizenship (Andersen 2005; Andersen et al. 2005; Barbier/Ludwig-Mayerhofer 2004; Serrano Pascual 2007b, 2007c; van Berkel/Valkenburg 2007b), employing a gender sensible perspective that takes account of the feminist strand of the debate (Andersen/Siim 2004; Ben-Ishai 2006; Hobson et al. 2002; Lewis 2006; Lister 1997, 2007; Lister et al. 2007; O'Connor 1993; Sevenhuijsen 1998; Siim 2005; Skevik 2005). Two important findings within both discourses were, *first*, that ALMP as a major part of welfare state restructuring is changing the relationship between the State and its citizens with significant effects on the citizen's civil, political and particularly social rights which, however, are divergent due to different types of activation and welfare states, each refering to different political discourses and normative ideals; and *second*, that the State-citizen relationship is not gender neutral, but historically has had different implications for men's and women's rights, which the "activation turn" has brought back on the agenda. This is true as the individualised adult worker model inherent to the activation approach has implications for two social realities:

a) *Gender segregation of labour markets*:

In most industrialised countries, labour markets are horizontally and vertically gender segregated with regard to the distribution of occupations, pay, working hours, career prospects, social security etc.. The question is here, whether ALMP aggravate or alleviate these gender segregations (and other social inequalities). Hypothetically, ALMP might help to *alleviate* gender segregation if they were accompanied by measures of "flexicurity", securing transitions between different states of employment and non-employment, and if they entailed 'enabling' programmes equally allocated between the sexes and social classes, thus empowering people to participate in properly paid employment and earn their living. But activation might as well *aggravate* gender segregation if such provisions were either lacking in cases of pursuing a "work first" approach, or if ALMP were distributed and allocated unequal. Such a variant would most likely result in increasing social inequalities and even social polarisation.

b) *"Care gap":*

The activation paradigm means that the complete commodification of all adults able to work is required. This obligatory universal labour market availability raises a conflict with care needs for dependants not able to earn their living (children, frail elderly people). The typical answer to this conflict within the activation paradigm is defamilisation and a commodification of care, i.e. to outsource informal family care work and allocate it either to the public sector (Scandinavian model) or to the market (Anglo-Saxon model). However, as the feminist strand of the debate on social citizenship has pointed out, this seemingly "simple" answer is neither satisfying nor even practicable: From an inclusive citizenship point of view, there is both the citizens' "*right <u>not</u> to care*", that is, to be free from caring obligations and thus enabled to do paid work – for

women and notably mothers not fully realised in most societies – , and the *"right to care"*, that is, to be de-commodified to some extent in order to participate in family care work and receive social recognition in the currency of time and subsistence rights. The awareness for the latter right takes account of the impossibility – and social undesirability – to completely commodify care work (Lewis 2002; Saraceno 2007). Between these two social rights and the entailed individual earning and caring responsibilities is a certain tension which has to be resolved in political discourse by finding an acceptable balance between both spheres of socially necessary work as a basis for recognition and subsistence, thus aiming at a socially inclusive version of citizenship (Hobson/Lister 2002; Lister 2007). This target also raises the issue of an equal distribution of the remaining "uncommodifiable" care work at the household level. Now, the "puzzle" in our discussion here is, *(how) do the different types of ALMP address these conflicts between the "right not to care" and the "right to care"*, and what are their *implications* for the social citizenship of men and women, notably fathers and mothers? Of particular interest here are the regulations of work obligations for persons with caring responsibilities, the degree of (de-)commodification of care work, and the question to what extent women and men, and especially carers, are enabled to participate in paid work by targeted ALMP and other supportive measures like sufficient childcare facilities.

Hence, there are two particular gender issues within the activation paradigm: On the one hand, the activation paradigm with its one-dimensional employment-centred path to social integration may cause problems as it does not meet the requirements of families and the society on the whole, ignoring uncommodifiable social needs and other than employment related paths to social cohesion. On the other hand, it is highly questionable whether activation strategies actually contribute to equal opportunities of labour market participation for all individuals which would require to take account of different individual needs and to counteract labour market inequalities, or whether they rather prolong or even enforce such inequalities due to selective practices (Crespo Suárez/Serrano Pascual 2007). The answers to these questions will result in very different evaluations of activation policies with respect to their implications for social cohesion and the gender regimes of societies.

2.1 Inclusive social citizenship and capabilities approach: recent typologies of activation policies

Drawing on the recent work of Skevik (2005), the impact of activation has to be analysed with respect to two gender relevant main aspects: *(a) the rights and obligations linked to the integration of earning-caring responsibilities*, and *(b) the right to individual autonomy*, defined as "the right to pursue one's chosen life projects, the freedom from unwanted and intrusive guidance on the 'right way to live'" (Skevik 2005: 51). The latter goes back to earlier normative measures of realized gender equality, developed by feminist comparative welfare state research, assessing the "women friendli-

ness" of welfare states by the degree of female independence from a male breadwinner as well as from commodified labour (Crompton 1998; Sainsbury 1999). Ben-Ishai (2006) has refined this definition of autonomy by emphasising its *relational quality* that takes account of the interdependencies of all humans and the relevance of acquiring the *capacities* to lead one's own life. Ben-Ishai states that autonomy cannot be developed in isolation but only within relationships that "assist us to develop capacities for autonomy" (Ben-Ishai 2006: 23), and concludes that *appropriate social services* are necessary that enable individuals to act autonomously, which, so the author, is not possible if service delivery is characterized by relations of domination.[3] In this sense, we refer to a normative concept of activation that implies *to empower citizens to strengthen their autonomy by enabling them to act autonomously* and live according to their plans which *includes both earning and caring responsibilities*. The underlying notion of *reciprocity* between individual and collective responsibilities is not constrained to gainful employment but acknowledges social responsibilities such as family care work (Valkenburg 2007). It relies on a *capabilities approach* (Bonvin/Farvaque 2007; Sen 1999) that insists on the individual freedom as the relevant informational basis for public action, i.e. people's capabilities (what they actually can do and be) and choices. According to this normative framework,

"…fostering people's responsibility is achievable only if adequate means and valuable opportunities, via the implementation of collective responsibilities, are defined and supplied. This is in line with a 'forward-looking' and 'task-oriented' perspective of responsibility, rather than a 'backward-looking' or 'blame-allocating' one (Goodin 1998) (…) Implementing collective responsibility in the field of labour market policies thus implies providing jobseekers with real capability for work, that is, with real access to a valuable job (which of course does not coincide with the elimination of any form of constraint or practical limitation, but with the necessity to build the most valuable combination of individual and collective responsibility (…)" (Bonvin/Farvaque 2007: 56).

This concept of capability or empowerment goes much beyond the mainstream idea of activation aiming at "employability" (Crespo/Serrano 2007) as it does not follow a "blame-the-victim" ideology in the attempt to combat unemployment, but insists on public responsibilities for macro-economic policies. This notion of empowerment is very different from the dominant concept of "employability" used in the mainstream discourse on activation which is usually based on a narrow, economist and ultimately gender-biased citizenship concept. The widespread term of "employability" ignores not only the institutional barriers that impede the development of and practical demand for individual capabilities (Gazier 2001; Promberger et al. 2008), but also leaves those capacities and orientations out of consideration that are not directly related to the labour market. Hence, this normative capabilities-based concept of empowerment could be

[3] The concept of individual autonomy in the context of welfare state policies needs to be further developed, which is beyond the scope of this paper. For recent theoretical work on this issue, see Bothfeld 2008a, 2008b.

used as a yardstick or benchmark to evaluate activation policies. According to this, jobseekers should be allowed and supported to bring in their own ideas and plans of how to cope with their responsibilities, and their not market-related capabilities and competences, their implicit knowledge and experience should be accounted as valuable resources and potentials to realize their plans. In the context of this paper it is moreover necessary to assess whether and to what extent "activating" and "empowering" policies are applied in a *gender sensible way*, i.e. taking account of structural differences in the situation of men and women (on the labour markets and in the domestic sphere), and whether and how *equal opportunities policies* have been implemented within the activation strategy.

To examine these questions, we particularly refer to some recent work of a group of authors that provides a promising approach to our research perspective as these authors emphasise a reciprocal view of a *'social contract'*[4] as a normative ideal (Serrano Pascual 2007b; van Berkel/Valkenburg 2007b). They analyse and typologise actual political strategies of activation as well as the normative foundations of underlying social-political discourses (Valkenburg 2007), and have established a typology of *"activation regimes"* using two dimensions (Serrano Pascual 2007a): The first dimension are the *"modes of managing individuals"* in activation policies. Here Amparo Serrano Pascual and her colleagues distinguish two different main types of modes, one that is directed towards the individual's behaviour in a moral-therapeutical way, blaming the unemployed as not willing or not able to fulfil their responsibilities, and one that aims at *matching up workers to market demands* by adaptive skill-management and/or reducing labour costs, thus attempting to improve the functioning of the labour market. The second analytical dimension in this typology comprises the contents and the reciprocity of the *social contract* between the unemployed and the State, in other words the *"quid pro quo"* of the individual's rights and duties (quid) and the welfare state's obligations (quo) which is more or less equally balanced and moreover based on different levels of welfare state spending. As a result, five ideal types of activation regimes have been identified within this two-dimensional matrix to which the seven empirically examined national activation types could be more or less assigned: The regime types are the *"economic springboard regime"* (UK), the *"civic contractualism regime"* (Netherlands), the *"autonomous citizens regime"* (Sweden), the *"minimalist disciplinary regime"* (Czech Republic), and the *"fragmented provision regime"* (Spain). Some of the examined activation types have been classified as more or less hybrid regimes (Denmark, France, Portugal, Czech Republic).[5]

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

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

For our discussion on the gender implications of activation types, this typology could be very fruitful. We have tried to make use of these works when elaborating a tentative analytical framework (see part 3), though it would afford more systematic, comparative research to fully grasp its analytical potential for our purpose. However, what already seems to be clear so far, is a certain affinity between the ideas of an inclusive citizenship, individual autonomy and empowerment as explained above, and the type of "autonomous citizens regime" described by Serrano Pascual and colleagues:

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

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

Another strand of useful analytical work that is applied in this research approach refers to the normative foundations of different activation policies, namely the different *concepts of individualisation* on which activation policies are based (Valkenburg 2007). The empirically recognized broad trend towards individualisation of social policy, in particular of activation policies, is *"…neither clear nor unifocal. In most European countries it is an expression of various discourses"* (Valkenburg 2007: 26), which partly even contradict each other, and which lead to different consequences and hence to more or less successful activation policies. Ben Valkenburg argues that *"the most fundamental issue in this discussion is whether or not the individualisation of activation policies enables people to be in charge of their own life"* (ibid.), thus refering to a quite similar normative ideal as quoted from the feminist strand of debate on social citizenship. The author then constructs a theory-based typology of these individualisation discourses and identifies five ideal types which of course are interrelated: (1) the discourse on the *"erosion of the traditional family"*, (2) the *"differentiation and flexibility of social and economic life"* discourse, (3) the *"privatisation and free market regulation"* discourse, (4) the *"shift in rights and duties of welfare state and citizens"* discourse, and (5) the *"growing reflexivity of individual and social life"* discourse.

While in this paper there is not the space to dwell on all these discourses, we just would like to briefly explain the fifth discourse type as it is seemingly most compatible to the idea of an inclusive, egalitarian citizenship: In this understanding, individualisation is interpreted in terms of growing reflexivity of individual and social life, as analysed and theorised by prominent authors of modernisation theory (Beck/Beck-Gernsheim 2002; Giddens 1990, 1991). This discourse acknowledges the permanent creation of new knowledge in modern society, taking place in a reciprocal process of everyday interac-

tion in which people develop their individual identity as a 'reflexive project': As users as well as producers of new knowledge in different contexts, their identities are in a flow, and *"what is 'true' for their everyday life today may become 'untrue' tomorrow"* (Valkenburg 2007: 31). To take account of these modernisation processes, according to this discourse *"individualisation of activation policies means that they should link up with and do justice to the reflexive projects of individual people"* (ibid.). This discourse implies a *reciprocal, client-oriented approach* which means that citizens should be enabled to take charge also of the process of activation, requiring to take into account "*the position from which the individual starts, their daily life, their strengths and competences"* (Valkenburg 2007: 33). In consequence, this understanding implies that *"(t)ailoring activation policy to the differentiated and flexible life is possible only if and when the individual citizen plays an active role in this process. This active role implies that the individual should be in a position to contribute their own definitions of problems, analyses and solutions to the process*" (ibid.; emphasis added). Such a strong position of the individual in a reciprocally defined activation process, not entailing complete freedom of action but taking charge of one's own life, would theoretically allow to pursue present life plans and exercise the 'right to work' as well as the 'right to care' within certain defined margins between individual and collective responsibilities. As the author himself says in this respect:

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

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

2.2 Activation regimes and gender regimes: first informed hypotheses

Now, how could this recent theoretical work of typologising activation policies – with regard to their different implicit understandings of individualisation and their different approaches towards the individual within a 'social contract' – be connected to the gender regime typology? In other words, what are the interdependencies of a certain activation regime with the specific normative, institutional and political patterns forming gender relations in a society? And what are the implications for social inequalities and the

opportunities for an inclusive social citizenship then? Sound answers to these questions could only be given on the basis of more systematic theoretical as well as empirical comparative research. However, in the light of available findings from some country studies *first hypotheses* can be stated, although they do not yet get a grip on the complexity of both regime typologies.

First, *'conservative' gender regimes* largely based on strong or moderate breadwinner models and with a limited relevance of equal opportunities policies could be understood as not (yet) having completely realized the individualisation process of modernisation. The predominating discourse of activation is therefore less likely to refer to a growing reflexivity of individual and social life as a consequence of individualisation processes in modern societies. Hence, countries of such a profile probably have a closer affinity to those activation regimes that are more paternalistic and grant their citizens less individual autonomy, involving less reciprocity between policy process and citizens. Most likely other activation regimes than the ideal type of an "autonomous citizens regime" are established here. Rather, a combination of different discourses – like privatisation and free market regulation, a shift of rights and duties – is likely to result in inconsistent activation strategies, implemented within an institutional, political and cultural setting that contradicts the individualised activation paradigm. Fragmented and hybrid activation regimes might be the consequence. With regard to the effects on social inequalities of such activation regimes, gender inequalities would not disappear due to the existing institutional barriers impeding an equal labour market participation. The same is probably true with respect to class inequalities which might even be exacerbated due to an unbalanced 'social contract' towards the citizens' duties' side.

- An example for this type of gender regime may be provided by the *Netherlands*, as studies on the treatment of lone mothers within the activation discourse reveal. In this country, lone parents (mostly mothers) have been a politically contested group for a long time with regard to their work obligations. Whereas lone parents dependent on social assistance were largely exempt from work obligations until the 1990s, this exemption was abolished during the social assistance reform act in 1996, but upon the insistence of a small Christian party the exemption was restored for those with children younger than 5 years of age (Knijn/van Wel 2001). However, in the implementation of the law, the responsible municipalities were given much discretionary space as to what extent they may enforce work obligations of lone parents. Empirical studies show that until 2002, the large majority of lone parents was still exempt from work obligations either for formal reasons if they had small children, or by de facto practices (Knijn/van Berkel 2003). The main responsible factors for this implementation deficit were seen – apart from still widespread traditional notions of the family – in negative fiscal incentives for the municipalities which resulted in a passive attitude of social workers against a clientele that needs high efforts of activation due to their complex social problems

(ibid.).[6] De facto, this group exempt from work obligations is thus excluded from activation schemes although survey data have proved a high motivation to work as far as this would not conflict with care responsibilities. Since 2004, there are no more formal exemptions from work obligations, and it remains to be seen whether and in what respect the situation has changed.

- In the *UK* as another example for a rather 'conservative' gender regime, lone mothers have also been explicitly addressed by activation programmes within the New Deal. However, lone parents of school-aged or older children are only obliged to come to interviews into the Job-Centre, but their participation in activation schemes is voluntary as is the search for a job (Dingeldey 2007a; Stafford/Kellard 2007).

Second, more *universalist, egalitarian gender regimes* based on the individual adult worker model clearly have realized a higher degree of individualisation, at least in the economic sphere of labour market participation, as in this regime type every citizen is in charge of their economic sustainability. It is rather obvious that such a starting point is much more compatible with the activation paradigm as such, or to put it more bluntly, the (economically) active citizen is a quasi natural precondition of these universalist welfare states (Larsen 2005a), and this normative *Leitbild* of an 'active society' is pursued consequently in the institutional and political settings of society. This also implies a rather reciprocal 'social contract' between the State and its citizens which probably results either in an "autonomous citizens regime" of activation, or – if a more moral-therapeutic regulation of individual behaviour predominates – in a "civic contractualism regime". Social stratification, being less prominent in these welfare states anyway, might be evened by this type of activation as, for example, public spending on 'enabling' policies can be supposed to be high. However, individual autonomy is first of all related to economic activity, and hence it is highly questionable whether and to what extent a status of 'inactivity', esp. due to care responsibilities, is recognized and remunerated in such regime types.

- In *Denmark*, the individual adult worker model has been realized for decades without much controversy, which implies universalised work obligations for men and women, in principle irrespective of parenthood. However, at the same time the level of de-commodification (duration and level of wage replacement rates) is still high, including generous parental leave benefits, and entitlements to participate in education and training programmes. Labour market participation of parents is moreover strongly supported by full coverage childcare facilities (Dingeldey 2005, 2007b; Linke Sonderegger 2004).

[6] Earlier studies on behalf of the OECD have brought similar findings, proving less support by activating programmes for social assistance recipients with multiple employment barriers compared to other, less 'hard to place' target groups (Handler 2004).

- In the neighbour country *Norway*, traditionally the most 'conservative' Scandinavian country regarding gender roles and family models (Leira 1992), the individual adult worker model was implemented rather late in the 1990s during welfare state restructuring. This entailed also stricter work obligations for lone parents. Since 1998, social benefits for this group were limited to three years, with an option for two more years if participating in education or training; moreover, social assistance for lone parents was limited to the age of eight years for the youngest child (Skevik 2005; Syltevik 2003). When the youngest child reaches the age of three, lone parents are obliged to take on at least a half-time job or to participate in education. These new regulations have been criticized as the highly gender-segregated labour markets, with low wages for women and not enough full-time jobs, would not supply sufficient job opportunities with living wages. Lone parents would be forced into the role of forerunners for gender equality without corresponding gender equal conditions in the labour markets and the domestic sphere (Syltevik 2003).

The latter example illustrates that the general conditions of gender relations in the public and the private sphere have to be taken into account when assessing the effects of activation policies, as the concept of gender regime implies. The German case study will provide another example for this statement.

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

3 Activation policies and gender: towards an analytical framework

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

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

3.1 Income support

a) eligibility criteria:

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

b) degree of individualisation:

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

c) generosity and duration:

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

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

3.2 Mix of rights & duties

a) 'duties package':

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

b) 'rights package':

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

This dimension is meant to measure the balance of 'social contracts' and the degree of individual autonomy and choice, assessing the modes of regulation of the individuals' behaviour. With regard to a gender-sensible analysis (and also with regard to disadvantaged groups in general) it is of particular importance whether and to what extent formalised rights and entitlements of the unemployed are provided within activation policies which practically can be enforced by the individual. For if these legal provisions are lacking and 'activating services' are delivered only on discretionary terms, there is not only the risk of endangered citizenship due to missing individual autonomy (Barbier/Ludwig-Meyerhofer 2004), but also the risk that gender stereotypes are transported in the daily practices of interaction between frontline-staff and clients: The practice of enforcing work obligations or sanctioning infringements does not necessarily follow formally gender-neutral legal regulations, but may be influenced by cultural gender norms that contradict the objective of gender equality. The same might be true for other stereotypical assumptions that are more based on general prejudices than on real social practice, e.g. with regard to ethnic minorities. However, it is true that legal provisions of entitlements alone would not guarantee that disadvantaged groups are actually able to exercise their rights. Legal entitlements could rather be seen as necessary, but not sufficient conditions for equal opportunities, which should be accomplished by further 'enabling' measures (see dimension 3 and 4).

3.3 Equal opportunities policies, target groups and access to ALMP

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

b) access to ALMP programmes:

- universal or selective access to 'enabling' programmes: legal provisions (eligibility criteria), incentive structures for disadvantaging groups with (supposed) low employability; differentiating programme type according to its quality (duration, training elements, labour market relevance etc.) and costs per client

- actual conditions for participating in ‘enabling’ programmes: timetables (part-time programmes?), extra benefits during participation (e.g. for childcare)

c) specific programmes for target groups

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

d) gender-specific data

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

This dimension should grasp the existence and ‘degree’ of more or less serious and consequent equal opportunities policies within activation regimes, as well as the specific approach towards vulnerable target groups of activation. We go into more detail of this dimension as up to now there is not much research available on this subject. As some authors have already shown for other policy fields (Larsen 2005b), the norm of an adult worker model does not necessarily entail a political orientation towards equal opportunities policies, but might for example be constrained to policies aiming at the reconciliation of ‘work and family’, leaving aside issues like equal pay or gender-segregated labour markets. The same is true for activating policies: While they are (more or less) oriented towards the adult worker norm, this does neither mean that both genders are actually *treated equally* by activation policies, for example in offering the same job opportunities or in imposing the same sanctions, nor is it self-evident that activation policies imply *proactive strategies* against structural discrimination. These would comprehend, for example, creating equal opportunities for disadvantaged groups (like mothers of young children, migrant women) by offering ‘enabling’ programmes that take account of personal circumstances and needs (e.g. family responsibilities). Such proactive anti-discrimination policies would also imply attempts to alleviate the gender segregation of labour markets, for example by defining a ‘suitable’ job in terms of adequate social security and equal pay.

Hence, to assess the existence and quality of equal opportunities policies of activation regimes both legal provisions and implementation practices must be examined at least in three respects: *First*, the question is whether and how *equal opportunities policies* have been implemented, governed and controlled: e.g. existence of gender quota of participation in ‘enabling’ measures of all types as related to reasonable reference parame-

ters;[7] responsible, competent officers for gender mainstreaming in public employment services; binding equal opportunities guidelines and gender training programmes for the frontline-staff; effective controlling measures of meeting gender target lines; degree of priority for equal opportunities policies set by chief executive officers in public employment services; etc. *Second*, it has to be examined whether the *access to 'enabling' labour market measures* is universal or selective by legal provisions and in actual practice, this also includes to assess whether there are (fiscal) incentive structures for service deliverers to disadvantage social groups with (supposed) low employability; the access conditions have to be assessed for different types of measures according to their quality and costs per client. *Third*, the question is whether and to what extent there are appropriate programmes for vulnerable target groups, considering also the concrete conditions for participation which should take account of the personal circumstances and needs of these groups. The outcomes of such equal opportunities policies can be measured, for example, by the effective participation rates of women in general and specific target groups, and by the outflow from unemployment to employment, ideally considering the quality of jobs.

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

3.4 Quantity and quality of "enabling" services

a) *government spending on labour-market-related personal social services* (education and training, counselling, job creation measures, settling-in allowances etc.)

b) *duration and quality of 'enabling' schemes* (e.g. training elements, participation conditions), spending per client, degree of individualisation of services (tailored services by case-management or standardised service delivery)

c) *quality and funding of personal social services delivery* not directly related to the labour market, but to social or psychological problems (childcare needs; domestic violence; drugs; debts; psychological problems; etc.): consideration of such problems in the activation process, effective support with appropriate measures or relegation of clients to other actors/service deliverers; sufficient or insufficient funding of these services (e.g. available places)

d) *distribution of 'enabling' services among client groups* related to their respective unemployment risks: universal or selective distribution.

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

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

3.5 Matching of labour supply and demand

a) *micro-level:* matching of job-placements and ALMP measures with skill-levels and other personal characteristics of the unemployed

b) *macro-level:* relevance of supply-side measures (education and training to upgrade skills) and demand-side measures (e.g. lowering labour costs by reducing social security, deregulating wage calculation and labour law)

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

3.6 Implementation conditions of activating policies

a) *governance structure:* degree of de-centralisation/devolution, degree of co-ordination or competition between operating agencies

b) *governing principles* of implementing activating policies: predominance of social policy principles (social inclusion) or business management principles (cost-effectiveness, marketisation of services etc.)

c) *overall funding and resources of public employment services*, caseloads of front-line-staff, skill-levels of frontline-staff

Though in most dimensions the implementation practices of policies have already been addressed, an explicit analytical dimension of the *overall implementation conditions* of activation policies is highly relevant as empirical research has shown (Serrano Pascual 2007b; van Berkel/Valkenburg 2007a). Rather than conceptualising these conditions as marginal, the implementation of policies has been recognized as the continuation of the policy-making process (Hill/Hupe 2005) in which many actors are involved (Sabatier 1988). For the actual quality of service delivery, the level of 'street-level bureaucrats' (Lipsky 1980) is of particular importance as here the restrictions of constrained resources and existing procedural insecurities are reflected on the one hand, coping strategies and informal working routines are developed on the other which may result in practices of stereotyping clients to make work easier (Hill 2005; Hill/Hupe 2005; Hudson/Lowe 2004). On all levels of the policy-making process, from the parliament down to the lowest level of implementation, value systems and normative orientations have effects (e.g. regarding gender roles or family norms), that are influenced by culture, institutions and discourses but may not be consistent. Such inconsistencies can result in implementation problems, as country studies reveal (Knijn/van Berkel 2003). It is therefore very important to assess the implementation conditions as they say a lot about the actual quality of activation policies. The gender relevance of this dimension lies in the interplay of these conditions with the general profile of activation policies: The concrete conditions of funding, governance structures and operating principles often make the difference between more 'enabling' or more 'work first' policies, with their explained gender implications. However, due to a lack of space as well as specific expertise on governance structures, we cannot go into more detail with regard to the gender implications of particular implementation conditions. What seems to be clear so far, is that conditions allowing for tailored services – i.e. sufficient funding, manageable caseloads, skilled frontline-staff, social policy governing principles instead of business management principles – are to be preferred with regard to a client-oriented approach enabling individual autonomy as explained in part 2 of this paper.

3.7 Interplay of activating labour market policies with broader policy context

a) *institutional regulation* in different policy fields setting positive and negative incentives for the labour market participation of women and men, mothers and fathers, i.e. family policies (financial transfers, leave schemes, job guarantees for returners etc.), income taxation (e.g. income tax splitting), social security (old-age, sickness, disability)

b) *quantitative and qualitative aspects of the market for personal social services*, especially of childcare facilities and schooling (*quantity:* coverage rates for different age groups, *quality:* opening hours, skill-level and number of personnel, price structure, vicinity to place of parental residence etc.); market structure of providers (public, private, non-profit), regional disparities of service delivery (geographical regions, urban and rural areas).

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

Researching these seven analytical dimensions allows to draw conclusions on the effects of a certain activation type on social inequalities, in particular with regard to gender, and on the interdependencies of activation types with gender regimes. As a result, it should be possible on the one hand, to make substantial assumptions about the consistency of an activation type and its gender implications. On the other hand, the analyses could reveal whether potential changes of a gender regime due to activation strategies may be assessed as path-breaking or not, of just incremental or rather fundamental quality, and perhaps in what future direction these changes may point. The next section summarises some tentative conclusions from empirical research on the German case of activation in which the proposed analytical framework has been used.

4 Lessons to learn from the German case

The German case study was based on a gender sensible analysis of the institutional regulations of the most recent ALMP legislation, official labour market statistics and recent evaluation studies, using the above described analytical framework as far as data were available. The detailed results of these still preliminary gender analyses of German activation policies have been published elsewhere and will not be completely inserted here (Betzelt 2007a, 2007c, 2008b). Instead, some conclusions will be drawn with regard to the raised research questions, summarising main findings without refering to each of the seven described analytical dimensions in detail. An overview of the analytical framework, including indicators and arguments on the gender relevance of each dimension, complemented by notes on the summarised findings for the German case, is listed in the following table.

Table: Analytical framework with core results from the German case study of activation

Analytical dimensions	***Indicators***	***Gender relevance***
1. Income support	‣ eligibility criteria ‣ degree of individualisation ‣ generosity & duration	‣ Individual independence from breadwinner ‣ Quality of social security/inclusion
German case: Dependency on a male breadwinner tightened due to (a) restricted access to individualised UE insurance system, and (b) stricter means-tests related to the household in new UB II (Arbeitslosengeld II) as now major security system for unemployment		
2. Mix of rights & duties	‣ *duties:* work obligations, defining ‘suitable’ job, sanctioning ‣ *rights:* indiv. entitlements, choice	‣ Universal or selective ‣ Implications for LM segmentation ‣ Statutory rights against administrative discretion ‣ Degree of individual choice
German case: Inconsistencies in legal provisions: work obligations selective (standardised exemption for certain group of carers), but extended to spouses; more duties than rights, little choice; much administrative discretion; de-regulated definition of ‘suitable job’ promotes LM segmentation		
3. Equal opportunity policies & access to ALMP	‣ equal opp. policies & gender data ‣ universal / selective access to ALMP schemes ‣ target group policies	‣ Strategies against structural disadvantages: enabling target groups; definition of ‘suitable’ job etc. ‣ Equal treatment in activation policies
German case: Insufficient implementation of equal opp. pol., low priority in practice; formally equal access to ALMP for all UE, but selective allocation practices (‘creaming’), low support for disadvantaged groups		

4. Quantity & quality of 'enabling' services	• spending on LM related services • duration & quality of enabling schemes • quality & funding of other support	• Profile of activation: upgrading or work first • Universal or selective provision • Enabling to individual autonomy?
German case: Downsized education and employability programmes; selective allocation logics; insufficient policies to increase 'employability' of carers (insufficient childcare infrastructure; little actual support by PES agencies) => counteracts 'activation' paradigm		
5. Matching of labour supply & demand	• *micro:* matching of placements & skill levels • *macro:* supply-side / demand-side policies	• Profile: upgrading or work first • Effects on LM segregation & social inequalities
German case: Macro-level: Expansion of precarious jobs as part of activation strategy (demand-side pol. of deregulation), likely intensification of LM segregations stratified by gender & class		
6. Implementation conditions	• governance structure • governing principles of implementation • overall funding & resources	• Actual profile of activation: enabling, client-oriented or work first, standardised
German case: Implementation conditions seem to make client-oriented approach difficult as case-loads are high, governance structure complicated, governing principles oriented towards business management		
7. Interplay with policy context	• consistent or inconsistent incentives for LM participation of women	• Consistency & coherence of activation with institutional & cultural aspects of gender regime
German case: Inconsistent incentive structures, largely contradictory to activation paradigm (income tax policies, social security system, low public childcare etc. privilege male breadwinner marriages), though recent family policies are gradually 'modernising' (e.g. work-related childcare allowance, 'daddy leave')		

Source: Original illustration, German case findings based on secondary analyses of evaluation research and labour market statistics; for details and evidences see Betzelt 2007a, 2007c, 2008b.

Abbreviations: LM=labour market; ALMP=Activating Labour Market Policies; UE= unemployment; UB II=Unemployment Benefit II (German means-tested basic social assistance "Arbeitslosengeld II").

The German case study refers primarily to the fourth and latest piece of the German labour market reform, in Germany commonly known as "Hartz IV" reform, coming into

force in January 2005.[8] This limitation is justified as this law can be seen as the core of Germany's latest activation approach,[9] introducing a new "regime" of unemployment benefit system (Jacobi/Mohr 2007; Knuth 2006) that breaks with Bismarckian principles as it imposes a means-tested flat-rate benefit system on a low subsistence level to the large majority of the unemployed (about 75% of all registered unemployed).

With regard to the research questions raised in part 1, the following preliminary conclusions can be drawn from the case study on Germany, refering to the related analytical dimensions *(in brackets)* described before:[10]

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

In Germany, the paradigm change towards the Activating Welfare State obviously has been performed incompletely up to now, as comparative research has revealed (Dingeldey 2003, 2008). The adult worker norm has not been implemented consequently in all policy fields and for the whole population, considering for example the persistence of the income tax splitting system for married couples and the still quite hesitant expansion of public childcare facilities *(dimension 7)*. Within activating labour market policies, we can observe only a rudimental path-breaking change of the traditional breadwinner model towards an individualised adult worker model while showing many inconsistencies, which confirms our hypothesis. Whereas work obligations have been extended to the partners of the unemployed by law, regardless of their individual vicinity to the labour market (commodification), the practice of implementation is seemingly rather selective and the allowed exemptions from work obligations for family carers follow exactly the traditional gendered family model. However, within the German activation type, the 'right to care' (de-commodification) has nevertheless been restricted by law as an exemption from the general rule that is limited to the standardised circumstance of children younger than three years of age *(dimension 2)*.[11] Anyway, also in this respect the implementation practice seems to follow more often the traditional family model, 'activating' much more often fathers than mothers. Traditional paths have also been embarked regarding the "re-familisation" of income risks by the stricter means-testing of households' neediness, stacked in particular against women living in

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

[9] Earlier labour market legislation in the late 1990s already introduced the "activation turn" (JobAqtiv-Gesetz 2002), but did not entail such deep structural changes in the Bismarckian unemployment security system as the "Hartz" legislation (Ludwig-Mayerhofer/Wroblewski 2004).

[10] For evidences and further references, please refer to the earlier quoted publications.

[11] However, in other policy fields such as family policy and old age security, the 'right to care' is recognized to some extent in the German model (e.g. parental leaves, allowances for childcaring, caring periods accounted for in the calculation of pensions).

partnerships *(dimension 1)*. In general, the restricted eligibility and the cut-back of unemployment benefits for the majority of the unemployed follows a retrenchment logic towards a 'workfare' type of activation, whereas the other side of the 'social contract', i.e. enabling labour market schemes, have simultaneously been downsized. With regard to social citizenship, the German package of "rights & duties" within the new means-tested benefit regime has to be classified as clearly biased to the citizens' duties' side. The high degree of administrative discretion found in "many worlds of activation" (Barbier/Ludwig-Meyerhofer 2004: 423), in Germany comes along with a considerable lack of individual rights.

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

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

On the basis of yet available data, it can be concluded that the gender segregation of labour markets has been aggravated by the recent labour market reforms *(dimension 5)*. The intentional large scale expansion of precarious employment forms with low or even lacking social security addresses first of all those who traditionally work in such jobs: (married) women and mainly mothers, giving them not enough to earn their living independently from a breadwinner. But due to stricter working obligations, also men are increasingly obliged to take up such precarious jobs under the new 'workfare' regime. Thus the segregation of labour markets may be structured increasingly less by gender alone, but also by class. This seems also to be true with regard to the observed gender-class-biased allocation practices of 'enabling' labour market schemes, showing that particularly for the most vulnerable groups there is not much of empowerment in the German activation system *(dimensions 3 & 4)*.

The official legal objective of gender mainstreaming within the Hartz IV legislation has not been implemented consequently as the law does not stipulate any further regulations or procedures how these goals should be controlled or implemented in administrative processes *(dimension 3)*. As a result, evaluation studies reveal that the objectives of equal opportunities policies in the large majority of public employment agencies are of very subordinate priority.

With regard to German policy strategies towards the tension between the individual's "right to work" and the "right to care", inherent to the activation approach, we can draw the following conclusions: The right to work is still far from being realised for those who have always been at a disadvantage within the German model – women with caring responsibilities, including single mothers *(dimensions 3 & 4)*. As evaluation studies show, mothers of young children enjoy considerably less support by 'enabling' meas-

ures (as well as they are much less imposed to sanctions) than fathers, this is even true for the small proportion of unemployed single fathers. The right to care is only recognised for selected groups, as evaluation shows, more for mothers than fathers, but only on a meagre subsistence level and entailing the denial of the right to work – as there are nearly no entitlements to enabling measures. Instead, strong fiscal incentive mechanisms are at work against supporting a (supposed) "weak" clientele *(dimension 6)*. Hence, instead of empowering citizens by strengthening their autonomy, in the German case citizens have very little choice. They must subordinate under an "*intrusive guidance in the 'right way to live'"* (Skevik 2005: 51) in case they fall under a category to be "activated", but their needs of assistance to develop capacities for autonomy are more or less ignored by a downsized system of ALMP.

With regard to the role of the conditions of implementation *(dimension 6)*, the analysed German evaluation results point at the following aspects as influential for increasing social inequalities and selective activation practices: *(a)* the governing principles of activation are oriented towards business management logics of cost-effectiveness which impedes the support of 'hard-to-place' target groups; *(b)* the complicated models of organization of public employment agencies and municipalities under the 'Hartz IV' regime makes holistic, client-oriented and problem-solving activation processes extremely difficult;[12] *(c)* the deficient institutionalisation of Gender Mainstreaming within the large majority of public employment agencies allow for gender-stereotypical activation practices; *(d)* traditional norms of the family and gender relations, still firmly rooted in existing institutions and in the minds of many 'street-level bureaucrats', contribute to such gender-stereotypical practices. All these factors are interdependent and probably exacerbate each other. However, further more detailed research is needed to elucidate these interdependencies.

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

[12] This model in which both public employment agencies and municipalities collaborate in different organisational structures, each body with different competences, has been qualified as unconstitutional by the Federal Constitutional Court in December 2007 as it was seen not in accordance with the German federal order. The Federal Government therefore has proposed a different model of a 'collaborative jobcenter' ('kooperatives Jobcenter') which is planned to be introduced in the next years. However, whether existing shortcomings of 'dis-coordination' between institutions and the shoveling of clients' problems on to the next agency, remains to be seen.

understanding of modernisation processes that considers the growing reflexivity of individual and social life. As research on activation processes has revealed (Handler 2004; Serrano Pascual/Magnusson 2007; van Berkel/Valkenburg 2007b), social integration of excluded groups can only be successful and sustainable if their individual circumstances, orientations, wishes and life plans are considered, and tailored, good quality services are provided. Such an activation approach, however, necessarily means to spend sufficient public resources on the activation policies (money, skilled personnel). If such resources are lacking within activation regimes of encompassing work obligations, there is the danger that activation services are expanded only quantitatively in order to 'cover' an increasing number of clients, but at the cost of deteriorating, standardised instead of tailor-made service quality (Knijn/van Berkel 2003).

5 Summarising conclusions

The paper discussed the implications of the individualising concept of 'activating' labour market policies for the welfare production between state-market-family, gender regimes and social citizenship. It was asked, how different types of activation policies, embedded in nation-specific institutional and cultural settings, address the fundamental conflict between both individual rights and responsibilities to earn one's living and to meet the care needs of dependent family members. The second big issue were the effects of such activation policies on social inequalities between men and women, notably fathers and mothers. These questions were examined on the theoretical background of the discourse upon social citizenship, refering to the notion of inclusive social citizenship rights and a capabilities-based concept of empowerment that considers individual capacities, wishes and orientations as relevant for 'successful' activation. From this perspective, we discussed recent typologies of activation policies and their underlying political discourses of individualisation, and tried to connect them to the concept of gender regimes. The resulting hypotheses linked different types of gender regimes to certain activation types, fueled by findings from some country studies, in particular the detailed German one. The German example shows that the paradigm shift towards an Activating Welfare State has been implemented incompletely since the concept of the universal adult worker citizen has not (yet) been realized in all policy fields and for the whole population (Dingeldey 2003, 2008). This finding is not a big surprise as the German 'conservative' gender regime, still well-established in institutions, culture and minds, is obviously contradictory to the notion of the individual adult worker. The German gender regime has thus experienced an incremental and inconsistent change due to the activation turn which could be classified as fragmentation (Bothfeld 2008c). The outcomes of activation policies within this fragmentary policy context are inconsistent as well, but evaluation research points towards increasing social inequalities and selectivity of support through activation. Similar findings were described for other 'conservative' gender regimes like the Netherlands and the UK, but the issue of selectivity apparently is not limited to these countries. Although the 'universalist' Scandinavian

welfare states may be assessed as more egalitarian in many respects (though to different degrees, thinking of Norway, cf. Syltevik 2003), including a better access for women and mothers to the labour market, selectivity and inequalities within the activation processes can also be observed here. Even in the model country of activation, Denmark, there seems to be a discretion-based classification of the unemployed which allows for long-term unemployed less individual autonomy than for those better-off (Larsen, J. E. 2005).

However, more systematic research is needed on this issue as on the interdependencies between activation and gender regimes, and steps are taken towards such research objectives within a European research network.[13] The proposed analytical framework has proved as useful in this respect as it does not only cover the relevant dimensions of activation policies, like the degree of de-commodification, the mix of individual rights and duties, the level and quality of enabling services and their universal or selective allocation practices, but also considers the existence of equal opportunities policies and the interplay of activation policies with the broader policy context in terms of their (in-)consistencies. In particular the latter dimension is rather demanding for comparative research because detailed information on legal regulations and institutional conditions in different policy fields such as family policies and income taxation is necessary. Moreover, a gender-sensible research of activation policies has to reflect gender and class inequalities in the labour markets and the domestic sphere to be able to assess both the preconditions and the outcomes of activation policies. In the German case study as well as in other works, the implementation conditions of activation policies have proved to be another highly (gender) relevant dimension as they can be very influential for increasing social inequalities and selective allocation practices.

Generally, the activation approach seems to operate in a difficult area between giving (more or less) support and exerting paternalist control (Skevik 2005). An inclusive form of citizenship that allows for combining gainful employment in living wage jobs and unpaid care work on a decent subsistence level for all people and in a gender-balanced way (Knijn 2004) is still far from being realised anywhere. However, such visions of inclusive citizenship (Lister 2007), empowerment and social inclusion should not be left out of sight as a benchmark of real policies.

[13] *"RECWOWE – Reconciling Work and Welfare in Europe"* is a European Network of Excellence within the Sixth Framework Programme of the European Commission. For further information, please visit the website: http://recwowe.eu. The planned gender-sensible research on the impact of activation policies on social citizenship, co-ordinated by the author together with Silke Bothfeld, WSI/Hans-Boeckler-Foundation, is embedded in Work Package 1 ("Flexibility and Security"), and is the follow-up of a previous project in this context on institutional and social aspects of activation. Within Recwowe, we collaborate with another project on activation policies in Work Package 4 ("Toward Employment Friendly Welfare States"), co-ordinated by Willibrord de Graaf and Rik van Berkel, Utrecht University.

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