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DENMARK AND PORTUGAL**

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Introduction

Portugal and Denmark obviously share many distinguishing features such as being small countries in the European Union context, having a long history of maritime openness conditioned by their location by the sea, or being predominantly rural societies until the recent past. However, nobody would look for similarities in terms of political culture, industrial relations or welfare regimes.

Portugal experienced a long period of authoritarian rule lasting for almost 50 years until 1974, and this had a very negative impact on political and civic life in many ways: suffocating the free expression of ideas, generating apathetic and fatalistic attitudes in the population, reinforcing particularism and clientism in every corner of the society, and creating a paralysing dependency of social forces on the omnipotent state. In the last 25 years, however, the nation has recovered strongly from the past, modernised itself in all its sectors and social spaces, become more confident and cohesive, and has committed the state to pursue redistributive policies in order to reduce social inequalities and poverty.

Admission to the European Community pushed Portuguese institutions more closely to the north European pattern and initiated a gradual trend towards economic, political and legal convergence. Despite the differences in their history and in social forces behind them, social policies in Portugal are becoming increasingly similar to those of their counterparts in other EU countries: as joint strategies are being developed within the EU for combating some common problems (unemployment, social exclusion, violence), values and attitudes seem to be losing their national character and becoming more cosmopolitan. Apparently, the gap separating the southern European welfare regime and the other welfare regimes (for example the Scandinavian) is narrowing, together with the emergence of new policy

forms and instruments that cut across the traditional divisions of welfare and function as 'policy models' for others to emulate (Ferrera, Hemerijck and Rhodes, 2000:53).

This tension between historicity and convergence inevitably underpins all comparative studies, allowing for a more complex analysis and a more reliable comparison. Taking this into account, the Danish and Portuguese experiences with activation policies have been analysed and compared in order to discern the impact they are having on the lives of the persons they address, how they are affecting social participation and individual well-being, and how far national differences are conditioning their results¹.

Throughout this article we will try to show the complexity of the process of promoting inclusion through activation programmes in both countries, either in terms of the conflicting assumptions underlying these programmes, or in terms of the interconnectedness of domains of inclusion in the individual's life. Thus we will begin with some reflections on the social and political contexts within which activation policies emerged and on the changing ideas of their role. We then move on to the experiences of the activated persons themselves, in order to enlarge our understanding of the perceived effects on their different domains of participation.

The activation road

In order to stimulate economic growth and increase the competitiveness of their products on world markets, the European states have undertaken reforms in their employment policies, resulting in, among other things, a reinforcement of flexibility. In parallel, there has been a re-orientation of employment policies from a philosophy of compensation for the loss of a job to a philosophy of promoting new opportunities for employment. However, as far as the traditional policies for the creation of jobs are concerned, what seems to be novel is the focus on individuals' job careers instead of on productive structures with multiple objectives which, among others, may include the reduction of the unemployed workers' dependence on benefits and the decrease of social security budget expenditure.

¹ The inspiration for this study came from the INPART research project carried on during 1998 and 1999 in six EU member countries: Belgium, Denmark, The Netherlands, Portugal, Spain and United Kingdom.

Another novel issue is the procurement of useful social occupations as an alternative for those who cannot find a job in the regular labour market.

To this multiplicity of objectives which run through the founding discourse of activation policies there corresponds an enormous ambiguity in terms of the practical implementation of such policies. The discourse of activation is compelling and it contains very positive arguments for the materialisation of basic social rights, or even of new social rights such as the right to work and to social insertion (Geldof, 1999). Its practice, nonetheless, raises serious problems given its permeability to ethical, financial and bureaucratic distortions which very often and insidiously undermine the formally noble motives of the discourse. The close link between the activation programmes and the subsidisation/benefit policies for the unemployed seriously conditions the scope of those programmes, contaminates the design of individual activation plans with ethical judgements, and can mean that the occupational involvement of the subsidised workers becomes a 'compulsion to be activated'.

In Portugal, activation policies for unemployed persons are new and as yet uncommon (Hespanha and Matos, 2000). Besides training, which has a longer tradition, the legal obligation of unemployed workers to be available to take an acceptable job under an 'occupational programme' was established in 1985. And even then, a policy for the activation of subsidised unemployed workers took another four years to be clearly defined. According to the law which regulates entitlement to unemployment benefits, the unemployed are obliged to accept some sort of 'necessary work' or to attend some sort of professional training offered by their local Job Centre. Any refusal to comply with this imposition without a suitable justification implies the immediate withdrawal of the unemployment benefit. More recently, since 1996, the new Guaranteed Minimum Income (GMI) scheme, which aims securing the subsistence of extremely poor families, ended up by forcing recipients to engage in insertion plans designed by the local authorities, possibly including some kind of work or training². The last example of activation policies in Portugal is the new programmes under the framework of the National Action Plan for

Employment³. They are intended to create, for all young and long-term unemployed people, opportunities for increasing employability through a personal insertion plan.

In Denmark, activation policies have a longer history and are quite widespread. A marked shift from traditional and soft forms of activation to more compulsory ones with elements of workfare has been experienced since the early 1990s. During the 1970s and 1980s Danish unemployment policy was predominantly 'passive', at least compared to Sweden, Norway and Finland, in the sense that unemployed persons received unemployment and social benefits for longer periods, and the activating measures were relatively marginal and mainly aimed at securing the unemployed access to unemployment benefits, as opposed to social benefits, which were lower.

This picture changed in the 1990s. Danish unemployment policy is now a front-runner in imposing activating policies on all categories of the unemployed. It is not only the core of the unemployed - those receiving unemployment benefits and thus having had a close relationship to working life - but also the more marginalised groups of people, who are activated by means of labour market inclusion schemes. In addition, governments have in recent years, after the 1993 labour market reform, restricted labour market exits and promoted a policy which curbs the general tendency to shortening working time.

That labour market reform aimed to reduce access to unemployment benefits, strengthen activation measures and widen the opportunities for exits⁴, but successive changes have since been introduced, mostly emphasizing the workfare strategy and reducing the access to periods of 'passive' employment benefits. The current status of the legislation on activation is such that the jobseeker's prime goal to find an ordinary and non-subsidised job, and the employment exchange and the unemployment funds arrange their activities accordingly. After one year of unemployment, the unemployed has to be activated under a

² Data reveal that, in 1998, about 3.5 percent of the Portuguese population was benefiting from GMI and that the insertion plans covered different domains: social welfare (31.7%), education (21.4%), health (19.7%), employment (12%), housing (10.9%) and professional training (4.2%).

³ INSERJOVEM and REAGE.

⁴ Act on the Active Labour Market Policy from 1993 constitutes a period of 7 years (divided into 2 sub-periods of 4 and 3 years) in which the unemployed person was entitled to an amount equal to the maximum rate of unemployment benefits (DKK 152 800 in 2000) conditioned by part taking in a variety of activating

personal action plan. This plan may include job training, individual job training, and education training.

The present Danish understanding of activation is distinctive because it constitutes a sudden and flagrant break with a century-old privilege for members of the unemployment funds to receive benefit as a right when unemployed. The only condition had been 'to be available to the labour market'; and this has always previously involved a narrow interpretation of 'labour market' (by comparison for example with Sweden) in terms of both geography and trade/skill.

In the Danish context, activation policies can be interpreted as a way of maintaining and legitimising a relative high level of unemployment benefits, and of avoiding neo-liberal solutions for labour market regulation. To comply with the struggle for competitiveness in the present 'non-inflationary growth regime', and simultaneously to maintain the institutions and organisations which secure a relative high standard of collective regulations in Denmark, the state must substitute market competition by supporting the market in maintaining discipline among the work force. Compulsory and workfare-like activation is important in this respect, in the sense not only that it actually increases competition in the labour market, but also because it legitimises the Danish mode of labour market regulation and keeps neo-liberal solutions at arm's length.

The study: aims and methodology

In this context of changing policies, the INPART research project aimed, among other objectives, to analyse the inclusionary impact of activation programmes for unemployed people from a comparative perspective. The lack, in previous studies, of consideration of the effect of activation schemes in terms of inclusion in other domains than work, measured both 'objectively' and 'subjectively' (i.e. how the situations of the activated persons actually are after participation and how those involved evaluate their personal situation after activation) made the INPART study very innovative. Different forms of work have been analysed across six countries. In this article we analyse and compare only two

measures according to an individual action plan which the unemployed person has a right to have set up after 3-5 months of unemployment.

types of policy - those associated with the 'secondary labour market' and those associated with training and education, i.e. policies based on the activation concept - and only two countries: Denmark and Portugal.

Under the heading 'secondary labour market' we group several activating programmes that are designed to include the unemployed, temporarily or permanently, into some type of paid work. Apart from being targeted schemes, one of the main characteristics of these programmes is that the jobs involved are subsidised in some way, for example by using benefits to subsidise wages. These initiatives sometimes combine the objectives of stimulating inclusion and meeting unsatisfied local needs (for example, with respect to the environment, services, public security).

The relationship between this 'secondary labour market' and the primary labour market is often quite different for the different programmes analysed in the case studies. Sometimes, the programmes provide subsidies to help to create regular employment. In other cases, the focus is on giving the unemployed opportunities for work experience (and sometimes qualifications), and the programmes are designed to be stepping-stones towards participation in the primary labour market. And finally, there are programmes that provide more permanent participation opportunities, under conditions more or less divergent from primary labour-market conditions.

In each case study, participants in the type of work being studied were investigated, particularly with respect to their inclusion and exclusion. In both countries case studies used anthropological interviews as an important source of information; in Denmark an extensive survey collected additional and standardised information on experiences of inclusion/exclusion into/from different systems: in the regular labour market, in unemployment, in activation schemes (including those on education and training) and in voluntary work.

The Danish case studies on schemes in the 'secondary labour market' referred to work-oriented programmes for people who are dependent on unemployment benefits or on social assistance. Although different laws regulate the activation of both groups, the activation programmes are quite similar. The compulsory nature of participation in

activation schemes is an important contextual element in understanding people's experiences with these programmes. Generally speaking, recipients of unemployment benefits are activated after one year of benefit dependency, and the same goes for people on social assistance who are 30 years and older. Younger social assistance recipients receive an activation offer after 13 weeks of unemployment. Thus, in most cases the activated unemployed will be long-term unemployed, that is they have been unemployed for at least one year. Work-oriented activation programmes include job training⁵, individual job training⁶ and pool jobs⁷. With the exception of job training in the private sector, the participants in these programmes may not earn more than the maximum rate of unemployment benefits. When full-time wages exceed this limit, working hours are reduced accordingly. Although participation periods may be shorter or longer, in general they are designed to increase inclusion opportunities within the primary labour market.

The Portuguese study of policies in the 'secondary labour market' focuses on the Occupational Programmes for Unemployed People (POC). POCs are oriented towards people receiving either unemployment benefits or the unemployed in economic need, whom they provide with short-duration (less than one year) occupational activities under projects promoted by non-profit organisations, largely in the areas of environment, culture, heritage, social support and other social areas. According to official documents, POCs were created to 'combat demotivation and marginalisation tendencies' among the unemployed, and to aid inclusion through a 'socially useful occupation'. POC placements entitle recipients to an additional income of 20% of the unemployment benefit, plus

⁵ Both with private and public employers. Pay and other working conditions should be according to collective agreements that apply for the sector. Wages are a maximum of 12 Euros per hour. Employers receive a wage subsidy of about 6 Euros per hour for each recruited unemployed. After 6 months of having received subsidies, a private employer has to employ the unemployed without receiving a subsidy, or should offer the unemployed training.

⁶ Also involves a temporary job at a private company, a public institution or a semi-public organisation. The employer receives a wage subsidy, which may exceed 6 Euros per hour. The subsidy period may be longer than 1 year. Conditions in individual job training are rather flexible and working time is set individually. The wage is a special project allowance and should not exceed the maximum rate of unemployment benefits. Other working conditions should be as close to normal as possible.

⁷ These are public sector jobs of up to three years duration for persons who have been unemployed for a period of 1 year. Hourly pay is the same as in public job training. The main aim of this scheme is to create more permanent jobs that should meet social needs or should improve the quality of existing services. Jobs can be created in the following sectors: environmental protection, conservation of nature, culture, collective public transport, housing, education, health and care, and the labour market field.

transportation, meals and the costs of accident insurance. Recipients are obliged to accept a POC job offer, otherwise they will lose their benefits.

Training and education can also be seen as an active social policy, aiming at increasing the qualifications of the unemployed in order to improve their labour market chances. Besides this goal, training and education activities represent types of participation in themselves, for they may provide participants with new social networks, useful activities, status ('trainee' or 'student') and so on.

In both countries, programmes of education and training were studied as forms of activation policies. In the Danish case, the study focused on a group of activated unemployed that received a trainee allowance for following an education course or participating in a vocational training programme⁸. In the Portuguese case, the focus of the study was a group of women (some of them being recipients of the GMI) that participated in a training course programme directed at the vocational inclusion of under-educated and low-skill unemployed persons.

We shall now move to the underlying assumptions and hypotheses. Social policies, even those stressing the importance of participation, are based on the assumption that labour-market participation involves social inclusion whereas unemployment involves exclusion. However this assumption may be criticised because of its determinism, its universalism and its simplicity.

Thus, our hypotheses assumed that (i) some jobs have exclusionary rather than inclusionary potential; (ii) for some people having a paid job is a necessary, though not necessarily sufficient, precondition for inclusion, others manage very well without; (iii) different types of work can contribute to or limit, people's inclusion in various ways, not only depending on the characteristics of the work involved but also on active social policies themselves and on personal characteristics.

⁸ Young people (under 25) on employment benefits who have not completed a formal education or training programme are treated differently from other unemployed. After 6 months of unemployment, their benefits are reduced to 50%, and they have the right and obligation to participate in education or training for a least 18 months.

In terms of social policy 'inclusionary potential', various forms of work constitute a hierarchy in which primary labour-market participation contributes most to inclusion and unpaid work/activities less. State programmes of subsidised and/or additional jobs for the unemployed create new segments of relatively marginalised work in the labour market.

Moreover, inclusion and exclusion refer to participation and non-participation in various social systems: we used work, consumption/income, the social network, the cultural system, leisure time and the political system as the main systems, and differentiated these into several sub-systems. Thus the inclusionary effect of policies has been assessed in each one of the different domains and has taken into account not only the 'objective' signs of participation but also people's own experiences as well (Møller, 1995).

Within this general formulation several specific issues about the relation between systems and sub-systems in the context of activation policies were considered, namely those associated with what we would call patterns of inclusion/exclusion: (i) the degree to which the activated persons are excluded/included from/into the various systems and subsystems; (ii) the prevalence of virtuous and vicious circles of inclusion/exclusion; (iii) the prevalence of patterns of compensation that have the effect that people excluded from one or more systems are more included in others; (iv) exclusion as a consequence of limited economic resources or shortage of time.

The inclusionary capacity of activation policies

This section deals with the analysis of exclusion and inclusion in the different systems. We begin with a sequential analysis of the inclusionary role of work, social networks, income and consumption, politics and leisure time. Then we discuss the relative importance of each of these domains of participation, distinguishing the objective and the subjective dimensions of inclusion, and the associations between inclusion in the different systems. Finally, some strategies pursued by those being activated in order to compensate for the lack of inclusion are examined.

Degree and extension of participation

Work

In a society like Denmark where the work ethic is heavily dominant, it is not surprising that the overwhelming majority of respondents find that paid work is a very central part of life. A significant majority of persons find that paid work is important for one's self respect (two thirds) and disagree with the view that work is only a way to get money. Even if they received a basic income equal in size to unemployment benefit, they would also work. It is the social milieu and the self-respect - not the money - which are the most important aspects of work.

The general and strong adherence to the work ethic might very well also contribute to a similar consensus as far as willingness to work is concerned: it is only around half of the respondents who agree (more or less) with the view 'that they would only work when work is interesting'. Indeed, the triumph of the work ethic is so sweeping and embracing that it seems that most people associate themselves so strongly with work that it is almost impossible for them to imagine, let alone to relate to, a permanent situation without work.

The low prestige of unemployment is not only the other side of the work ethic 'coin', i.e. a question of a societal norm and the ability to cope with it. Most blue-collar workers actually have experienced spells of unemployment (mainly caused by the specific ease and low cost of dismissals in Denmark), and in particular they emphasize that unemployment is also a question about the inability to pass the time and the restlessness associated with unemployment.

In the Portuguese case studies, the importance and centrality of work as a means to inclusion is evident as well. The women involved in state-subsidised jobs and training courses for the unemployed with low skills and little education reported past experiences both in and outside the regular labour market (paid work in the black economy, informal unpaid work, voluntary work and household work). For the large majority of the women interviewed, work is considered as 'a source of fulfilment' and 'a way of earning money'.

Less frequent than these motives, and in descending order, are the conceptions of work as 'a means of surviving', as 'a way of being useful in society', and 'a way of spending your time'.

The most striking fact is that, in general, people tend to adopt a hybrid or at least twin conception of the value of work, according to which work combines financial security (material fulfillment) and personal fulfillment. Thus, those interviewed considered it very important to be financially independent, that being also a cause for their understanding of work as a source of personal fulfillment, in the sense that the financial stability ensured by work constitutes a precondition for their personal fulfillment. On the other hand, not having a paid job strongly limits their participation in other spheres of social life, both in the sense that being employed means that they can use the income earned to include themselves more into other systems, and also for the social recognition one gains for the simple fact of having a job. This is also a way in which work is seen as a privileged form of inclusion.

Finally, for the hypothetical situation of being entitled to a basic income of the size of the national minimum wage, the attitude of the Portuguese women undergoing activation was similar to that of the Danish respondents: to keep their jobs, instead of increasing leisure. In the case of those who declared that they would rather stop working, the choice was grounded, not on a preference for leisure as such, but on their wish to take care of their family farm or have more time available to help other people in need or to engage in cultural activities.

Income and consumption

In the system of consumption/income, Danish people undergoing activation consider themselves to have been offered a relatively fair position. A surprisingly large proportion of participants in activation measures express satisfaction with their living standards, are not worried about future economic problems, and do not feel that their lower income restricts self-expression. While to some extent this high degree of satisfaction with one's personal economic situation has been observed by other research in Denmark, the present study also points to low material ambitions which to some extent could be explained by resignation to one's fate. Another explanatory factor is the hope for future improvements.

If we combine the level of income and satisfaction with present standard of living, we can conclude that more than a half of the activated persons were included in the consumption domain, and that only 9% were excluded⁹. The remaining 35% belonged to a middle category of being neither included in nor excluded from that domain¹⁰.

The Portuguese activated persons were found to have very low income levels and poor patterns of consumption. Both Portuguese case studies reveal that the major share of expenditure is directed to the purchase of the most basic goods, namely food, housing and household expenses, and medical and health services. Similarly, the analysis of the consumption of durable goods shows that it is limited to those goods as are currently considered to be essential. Many of those interviewed confirmed that, because their incomes were too low, they had to resort to bank loans as well as purchase some goods by instalments, which in some cases led to very serious situations of indebtedness.

As for the less basic - and the non-basic - needs, consumption is very drastically reduced and the interviewees acknowledge that they are denied something that is important in terms of their social image, of their overall inclusion. In the groups studied, the most obvious is abstention from cultural consumption; an aspect that shall be further discussed below. There were other occasional situations where the respondents emphasise the fact that they have to renounce going on holidays because it is financially impossible for them to do so.

Social network

The social network domain can consist of a range of social relations at or outside the work place. Workplace-based social networks were revealed to be of the utmost importance for activated persons, as a bridge towards more frequent contacts with other people. It is not that the activated people would be socially isolated without workplace or activation contacts, but rather that a significant part of these people's regular social relations take place at the workplace.

⁹ Activated people were considered included when they declared to be "very satisfied" or "satisfied" with their standard of living and at same time to have "high" household net-income (above 6 000 DDK per month for singles, and above 14 000 DDK per month for couples).

¹⁰ Data stemming from the survey.

Some people undergoing activation in both Denmark and Portugal reported unpleasant experiences of loneliness and declared that it is unhealthy for human beings to be isolated. It is most often this experience of loneliness, especially during hours when other people are at work, which in combination with the new and regular social contacts established via activation made nearly all those interviewed express satisfaction with their inclusion within an activation scheme. Sometimes it is the negative side, i.e. breaking the isolation, which is emphasised, sometimes it is the positive side, i.e. the enlarged social network.

In Denmark, the status associated with paid work is seldom extended to cover activation. On the contrary, many activated people reported not so seldom the stigmatising effects connected to various activation schemes. Nevertheless, if we take into account the status associated with work, it is not surprising that activated people more than any other group in the study appreciate the enhanced social network associated with inclusion within a job or another form of social activity. For the Danish case, the survey data show that 45 percent of the activated people think that their social life has improved as an effect of participation in activation while only a few percent think their social life has deteriorated.

This positive evaluation is especially pronounced in the Portuguese case studies, particularly in the case of women activated by training courses and where the data were collated during or immediately after the activation experience. The way in which participation in this measure is structured favours the participants' inclusion, expanding the social networks of people who previously had had difficulties in that domain. In another sense, participation also promotes professional advancement, since training implies the acquisition of knowledge and information appertaining to the area of new technologies (the skills offered by the training courses).

In this connection the Danish interviews give a few examples of activated persons' strategies for expanding their social contacts: while they still suffered from the deteriorating effects on their social network of a 'sudden shock' (Micheli 1996), some strategically tried to include themselves within new leisure-time activities where they hoped to make new friends.

Concerning social networks outside the workplace, the nuclear family and friends are the most important networks. In Denmark, the proportion of those undergoing activation who live alone is much higher than in Portugal. However, living alone does not mean that people are without social relations: 56% of the activated Danes reported that they had contact with other family members, 21% with friends and 47% with neighbours.

If we combine the frequency of contacts with family and friends and the satisfaction with social network we can get a more comprehensive picture of social life. In Denmark 42% of the activated persons were strongly included in social life (i.e. they had daily contact with either family or friends and at the same time they were 'very satisfied' with their social network); 18% were excluded in social life (i.e. they were either 'unsatisfied' with their social network or they had seldom contact with family and friends and had not stated 'very satisfied' with their social network); and 40% belonged to a middle group (i.e. they were neither included nor excluded in social life).

For the Portuguese activated persons we have no similar statistical data. Nevertheless, the interviews confirm the great significance that is given to daily family relationships. In general, the women interviewed have daily contacts with their closest relatives and consider that this type of relationship is of the utmost importance, constituting a solid contribution to the stability of their lives. Although family relationships have a determining weight in terms of these women's lives, their relationship with their friends is also considered a very important issue. No case of absence of participation at the level of primary social relationships was registered. However, it must be mentioned that, notwithstanding the fact that all respondents declare that they have regular contacts within primary social networks, those contacts are in fact circumscribed to the closest family circle including also their small circle of friends. Relationship with neighbours seems to be of a very limited and superficial sort.

On the other hand, some interviewees reported that they felt excluded from social life. Thus, two persons activated through job placements and four persons through training courses stated that they had felt excluded from social participation. The reasons for that feeling were connected with racial discrimination (in the case of a black woman) and to the

stigmatisation of people belonging to the lower classes or in a situation of poverty (the remaining cases). For all those people, the participation in activation programmes opened the gate for new social networks and thus for more social inclusion.

Politics

Indications of a general decline in West Europeans' traditional political activities, such as membership and activity rates in political parties and trade unions, have also been observed in recent national Danish surveys (1993 and 1994). However, this has been accompanied by a growing interest in more specific, single political issues, some of them with a local focus. These developments made it necessary to use a broad concept of political activity for the study, one including not only the traditional areas - activities within political parties and trade unions - but also activities within social movements, in tenant's organisations, day care institutions, support for refugees, petitions, helping sections of the population in urgent need, etc.

As expected, the data show that political activities within political parties and trade unions are rather low (3 percent and 13 percent) among activated persons in Denmark. Some of the interviewees reported that they had difficulties following the political discussions because they had problems understanding what is really going on. To some extent, the activated also seem to lack important dimensions of the factors, including the daily presence and conversations at the workplace, required to follow the political debates. If we combine the subjective and the objective dimensions of participation in political activities, we can conclude that about one quarter of the activated Danes were politically included, another quarter politically excluded and a half belonged to a middle category of those neither included nor excluded.

From the Portuguese study we get an even worse picture. Participation in the political sphere is generally very limited. There are, however, some asymmetries that should be registered: the women in job placement reveal a closer proximity to the political sphere than those in training courses, namely in electoral participation. It may thus be said that, from the objective viewpoint of the analysis, most of these women have shown that they are somewhat indifferent regarding politics. Their strongest link to this sphere is limited to

electoral participation, although, as we have seen, that link proves to be extremely fragile. In quite another sense, it might be said that the interviewees from the less participative group show a more pronounced lack of confidence in the political sphere, a fact which is most probably due to their life-long precarious living conditions. These women manifest a total lack of confidence in the capacity of politicians to solve their problems.

Leisure time

A substantial proportion of the Danish activated persons report that they do not have any leisure time activities at all, while another and also substantial part spend a large number of hours on leisure activities. The majority of the activated persons say that they would like to go more to cinemas, sports events, restaurants etc., but do not have the money. This reveals that there are several sub-systems from which significant parts of those out of income system are either excluded or have a marginal position. If we consider as included those who normally spend more than five hours per week on special leisure activities, then we can conclude that 41 percent of the activated persons are included.

The Portuguese study made a distinction between formal cultural activities - those promoted by local associations with the objective of fostering culture - and informal cultural activities - those that take place outside institutions and which correspond to manifestations of traditional or popular (folk) forms of culture, such as village or neighbourhood celebrations (festas), games and recreational pursuits. Strong limitations in access both to the system of high culture and to mass cultural events were reported: lack of income, rural location, patriarchal rules restricting married women, lack of time, etc. These constraints account for the fact that most of those interviewed, particularly the older ones and those who were married, report spending much of their spare time at home, watching television, doing handicrafts (e.g. crocheting or embroidery), or perhaps going for a walk, rather than taking the opportunity to join in cultural activities.

The factors restricting participation in formal cultural activities notwithstanding, all those interviewed considered it important to take part in them. They could see the advantages of the increased sociability accruing from participating in these activities and mentioned the opportunity of access to or broadening their acquaintance, the chance of getting away

from their everyday problems and, further, the opportunity to see and learn about new things.

We can thus conclude that there is a certain degree of marginalisation of those undergoing activation with respect to the cultural system, but that this marginalisation resulted overwhelmingly from the existence of specific obstacles, notably lack of money and time, and the attitudes of particularism that govern the running of many cultural institutions and the general social life of the community. In addition, the persistence of forms of patriarchal domination impedes women's access to cultural initiatives. The data on the consumption of cultural goods also confirm this conclusion. Despite all this, none of the interviewed said they felt excluded from the cultural system, although they recognised the existence of hindrances to their participation and wished to overcome them, since they appreciated the importance of cultural participation.

Hierarchy of forms and domains of participation

In this section we shall deal with the question of the relative importance of the different systems of participation and the degree to which the activated persons are excluded/included from/in systems and subsystems. Taking into account that some of the five main systems could be more important than the others, people were asked about their evaluation on their relative importance. Interviewees were asked about which spheres they regarded as being most important and in which of them they would spend more time, if more time were available.

For the Danish activated persons it is the new and regular social contacts which make them express satisfaction with being in the scheme. Moreover, if they had more time they would like to spend the extra time reinforcing cultural life and social networks. In the Portuguese studies, participation in the economic sphere is regarded as the most important, followed by participation in the social. The reason for the importance given to the economic sphere is largely the value it has in their lives, in terms of providing income and personal fulfilment, as the interviewed' experiences fully confirmed. The preference for the economic also reinforces the question of the centrality of work, discussed earlier.

As regards the social sphere, it should be said that the fact that this is also a priority area of the lives of persons arises from the importance that social networks, including family and friends, have in the lives of the interviewed activated persons. Comparing the two Portuguese studies, while in the case of those activated in subsidised jobs the current priorities of the interviewed's are solely concentrated in the economic and social spheres, in the case of women in training courses the choice is more varied. One of these women gave high priority to the political sphere, as she thought it was important to be informed about the present political situation, though her participation in politics was confined to voting in elections. On the other hand, the religious sphere was important to some of those interviewed who felt it was necessary to believe in some transcendental being, seeing religion as a refuge where they would find emotional stability to cope with their daily problems.

With regard to the second question - the domain in which they would invest more time if it were available to them - their responses altered the initial hierarchy. In both cases, the economic and social spheres continued to have the most weight. But in the social sphere, the reasons given earlier, concerning the importance of family and friends, lost their prominent place, and solidarity assumed greater significance. In other words, if the interviewed had more time, they would spend more time on tasks involving solidarity, to help disadvantaged people. The choice of greater social participation may be explained further by the investment at the level of the networks of secondary sociability. Many interviewees, while not investing in them at the moment, think it is very important to have a wider range of acquaintances and to socialise with people outside the circle of family and friends. The great difference observed in this second hierarchy lies in the high value given to the cultural sphere. Participating in cultural activities represents the power to enjoy leisure time, learning something new or simply amusing oneself. Respondents subjectively consider participation in cultural life to be an extremely important goal, but one that is unattainable given the restricted living conditions in which they actually exist.

Summing up from the evidence from both countries, Danish persons are quite likely (just above 1/5) to be performing voluntary work, they are seldom socially isolated, seldom

culturally isolated, rarely politically isolated, and quite often they conceive themselves to have a relatively fair position within the system of consumption/economy.

In general, however, the Portuguese data suggest that the situation is rather different. In Portugal, activated women often perceive themselves to have a marginalised position within or to be excluded from the system of consumption/income, in particular, and that their prior standard of living as unemployed had been so low (or the threat of cuts in unemployment allowances so menacing) that the importance of the additional money from activation is by far the most important and overshadowing effect of their partial inclusion into the system of paid work/activity. Those activated women explained that, given the economic hardship, spending on social contacts and participation in formal social activities such as local associations were eliminated or reduced to a minimum. The same applied to inclusion in the cultural system and sometimes even encompassed the health system. Consequently, the importance of receiving a benefit when activated was crucial to increase the family budget.

However, on the inclusion side, the Portuguese study revealed evidence of a general inclusion into the extended family system, expressed by way of daily family relationships. Furthermore, it seems to be rather usual to find people who help their relatives and neighbours doing farm-work, needlework, mending clothes or helping in other occasional jobs, such as moving or painting the house. The Portuguese study also registered quite some inclusion in the system of politics.

Interrelated effects of participation

In the previous section we have referred to some inter-causal relations between systems e.g. the allocation of free time between work and leisure activities; the relation between wage work and patterns of consumption; the relation between work and the composition of social networks. Now we address, on a comparative basis, the issue of the relationship between having a good/bad position within one domain and a good/bad position within one or more of the other domains.

One of the most prevalent associations is that a process of inclusion in paid work often leads to increased inclusion in the system of consumption/income. But we can also emphasise the relationship between the economic system on the one side and the cultural system, the leisure time system, and other systems and subsystems on the other side. The Portuguese and partly the Danish study suggest that lack of money or economic resources quite often hamper the degree of participation in cultural and other spheres.

The Danish study shows that there are some - although in general remarkably weak - partial associations between the five systems operationalised, being the dominant associations with the system of consumption/income.

Without postulating causality, which often goes both ways and which also is often contingent on the interaction between one or more of the intermediating variables, it is from the data that the system of consumption/income shows far the strongest associations with the other systems - both the system of employment, the system of social networks and the system of politics - but not with the system of leisure-time. Even acknowledging that the Danish observations are the only set of observations in the INPART project which give us a more representative and systematic registration of the importance of inclusion into one system for the inclusion into other systems, and without postulating mono-causality, it is striking that inclusion in the system of consumption/income seems to be of more importance for inclusion into other systems than 'paid employment as the royal road to inclusion'. As mentioned, such binary relationships may or may not be a result of one-way causal relations. However, they never include more than two subsystems.

The Danish study provides some evidence, particularly among the employed, for the prevalence of virtuous circles, i.e. that inclusion in one system leads to inclusion in others. But the same data also indicate that these tendencies are restricted in scope. This is because one cannot observe any individual, at all, who has a strong position in all five systems and that those persons who have a strong position in four systems are indeed very few. The same study also shows that there is almost no tendency to vicious circles, i.e. that those persons who are marginalised or excluded from one system are also marginalised or excluded from most other systems.

The Portuguese study suggests different conclusions concerning the prevalence of vicious and virtuous circles. The main deviation is observed with respect to inclusion in the social network system. In Portugal, the pervasive prevalence of the extended family subsystem frequently plays a decisive role as a stepping stone to inclusion into other systems and subsystems. These systems are, in particular, the system of consumption (sharing land, homes, clothes and food); the leisure-time system; the cultural sub-system (in particular its low-cost elements); and to some extent also the system of work (informal and formal paid work). The Portuguese extended family - particularly prevalent in rural areas where the data were collected - often functions as the first link in virtuous circles.

The Portuguese data do not stem from a representative sample so we cannot measure their representativity. We can only say these data point to the significant inclusionary potential of the extended family as often a very important and first link in a chain of virtuous circles. However, the data also reveal that the extended family does not always mean inclusion into other systems. A few of the interviewed women reported chauvinist husbands who, in combination with stricter norms about what is decent female behaviour, impose restrictions on their inclusion into leisure-time and cultural activities as well.

The question as to the extent that (unwanted) exclusion from one system is 'compensated' by inclusion in other systems also deserves our attention. From the Danish study it is striking that very rarely is exclusion from or a marginal position within one system compensated by inclusion in other systems.

Finally, there is the question whether a strong position within one system leads to patterns of exclusion from or marginalisation within other systems as a consequence of limited economic resources or shortage of time. From the Danish qualitative studies there are observations which show that the workplace's social activities sometimes seem to satisfy fully employed persons' need for social contacts to such an extent that they voluntarily reduce their other contacts (to the extended family, neighbours and friends).

Strategies for exclusion and inclusion

As we observed, the associations between individuals' positions within the different systems are, in general, surprisingly few and rather low. This led us to conclude that there seems to be no 'automatic' inclusions or exclusions from positions in one system based on positions in other systems. It is furthermore our contention that many people realise that they are not 'automatically' included into a second system by their inclusion into the first (and vice versa as far as exclusion and marginalisation are concerned), and consequently they start thinking and acting strategically. This process of strategic thinking, we claim, will be exacerbated by people's acknowledgement of the fact that neither are they 'automatically' compensated for involuntarily exclusion from a system. Instead they have to develop and pursue their own strategies of inclusion and exclusion and they have to make up their minds as to where they want and where they do not want to be included.

Inclusion is not necessarily always a good thing and there are numerous situations during people's life trajectories where they do not want to be included into this or that system. Not surprisingly, the case studies are full of examples about people who do not want to be included in the system of politics, the system of religion, the system of sport, different subsystems of fine art and culture, the subsystem of pop culture, etc. And most people are, for shorter or longer periods of their life, some even for their whole life, indifferent to or even have aversions towards one or more of the specific systems or subsystems. They voluntarily exclude themselves and normally without problems. Other people may disapprove or deplore their decision, but most often politics, sport, religion and cultural activities are considered strictly to belong to the individuals 'private sphere'.

This does not apply for the nuclear and extended families which certainly are objects for strategies of inclusion and exclusion. For example, some Portuguese women said that they decided to get married young (and hereby include themselves - sometimes temporarily - into a new established family) to escape from excessive paternalistic authority (in their original nuclear or extended family). Also some of the young Danes reported plans for leaving the family where they were raised. However, they did not need

to establish another family to leave home, and their voluntary exclusion from the family system would not necessarily be temporary, considering the large and growing share of the population who already now live in one-adult households.

But people may have other reasons for their preference not to be included than indifference or aversion towards a system. From one of the Portuguese case studies it is reported about a man who refused his neighbours' offer to help with building his house since he was afraid not to have the time to 'repay' them when the day came when they needed his help. So, consequently, he excluded himself from, or at least voluntarily restricted his inclusion in, the subsystem of community/neighbourhood network. This was mainly due to the relational nature of participation in social life, based on reciprocity that imposes obligations to those who benefit from others' help.

Looking at people's preferences for being included in one or more systems, the overall impression coming from our study is a strong commitment to be included in paid work. Other people include themselves in education, which is then used as a stepping stone to inclusion in work.

As was shown above, and as far as we can separate the effects of inclusion in paid work from inclusion in the system of consumption/income, a person's inclusion in the system of consumption/income often will be more important for her/his inclusion in other systems than her/his inclusion into the system of paid work. It is therefore relevant to identify the coping strategies applied by the activated persons to reduce their marginality and gain a stronger position within the system of consumption/income.

Compared to the Danish data, the Portuguese observations reflect the much lower level of unemployment benefits and other social benefits paid out to the activated and unemployed persons. Portuguese coping strategies also reflect the fact that the process of de-ruralisation of Portuguese society is far less advanced. There are, firstly, strategies to increase income and reduce expenses: in rural areas, farming and rearing of animals for home consumption, cultivating a small vegetable plot or even a larger garden at the edge of the town are typical strategies of inclusion. Otherwise, there are possibilities of taking odd jobs such as personal or domestic service, cleaning or selling in the streets. The other

family members, typically, can take on overtime and more than one job. Much of these activities are taking place in the informal market as a normal and essential means of economic survival for many of the families studied. Expenses are most often reduced by tightening the belt. An illustration of this is the case of one of the respondents who had to remove her daughter from school because she could no longer bear the cost of transport, clothing and educational material.

The second type of strategy focuses on increasing support by investing in primary solidarity networks. Despite scant resources, these Portuguese families show a huge willingness to help the most needed. Their family solidarity is manifested in the capacity to host those (relatives, friends) in need, in caring for the elderly, for children, for handicapped, in sharing goods, such as land, homes, clothes and food.

The Danish coping strategies are very different from the Portuguese and reflect a predominantly service society without pre-modern modes of production, and where the great majority of the activated and unemployed persons are living in one-person households. Two types of coping strategies prevail. First, material ambitions are observed to be lower among the activated (and unemployed) than among the rest of the population. Secondly, activated (and unemployed) show quite some acquiescence in their situation. The latter is sometimes combined with the hope for a future in which the degree of inclusion into the system of consumption/income is stronger.

Having once been hit by unemployment, activated persons may develop strategies to compensate their exclusion/marginalisation by including themselves in other systems. Unfortunately the INPART data do not provide systematic or comprehensive information in this matter. The few data that do exist confirm that such strategies prevail, but how frequent they are, remains uncertain.

The first concerns a young Danish woman whose education was cut off by disease. At present she is activated in a project where the participants are informed about and gain an insight into various types of employment and education/training schemes. In her leisure-time she plays the violin and so has a position in the cultural system. At the same time, however, she sometimes feels a bit lonely and consequently has decided to play with an

orchestra and hereby hope to enlarge her network. She has also recently found a boyfriend among the other activated. In other words, she utilises her inclusion into the cultural system and the subsystem of activation to strengthen her position in the social system.

The second example is about a former fire fighter and top-level ice hockey player who years back had a mental and physical break down that lasted for years. At present, he is activated a few hours a week in a voluntary cafe in a deprived part of Copenhagen. To enlarge his network, which was totally destroyed (family, friends) with the break down, and since his physical capacity is still very limited he has started as a voluntary roller-skate instructor for working class kids in another deprived area of the city.

Concluding notes

We have found that activating schemes do certainly have an inclusionary potential. Although to different degrees, they provide participants with economic independence, income improvement, social contacts, status and respect, useful activities, self-confidence and a more positive outlook. At the same time, all schemes also have clear exclusion risks.

As far as the temporary schemes are concerned, the most important issue is, of course, what will happen to participants once their participation in the scheme is finished. Since these schemes are designed to be stepping-stones to regular labour-market participation, their inclusionary potential is significantly increased when they actually manage to contribute to labour-market participation. Participants' positive evaluations of the schemes can at least partly be attributed to the positive expectations they have in this respect. At the same time, we also observed that when these expectations are not fulfilled, experiences of exclusion increase. This risk is not imaginary, as our case studies and other investigations into similar schemes show: there is a considerable risk that people find themselves trapped in an activation recycling process, participating in one scheme after another. This does not imply that people would prefer being on passive benefits, but being caught in this activation process and lacking opportunities to escape from it may contribute to experiences of marginalisation and stigmatisation.

A final remark on the Portuguese activation system. The practice of activation, although more recent in Portugal than in other European Union countries, is not insignificant at all, and figures show that the Portuguese state is now fully engaged in the same orientation as its European partners, in the sense that it clearly privileges active measures to combat unemployment and 'as a stimulus' to employability.

It is worth pointing out, however, that in the Portuguese case, and differently from the Denmark, the benefit amounts are very low, which explains the fact, among others, that trade unions have been highly critical of possible changes of orientation which might eventually reduce the still existing and 'indispensable' passive employment policies.

Maybe this is the reason why the compulsory side of these programmes has been neglected until quite recently. There was neither a systematic call on the subsidised unemployed to be activated - this was dependent on the demand of a particular receiving institution - nor a real obligation to accept the offered job - the beneficiaries could easily reject the offer without any negative consequences. The oldest Portuguese experience in activation policies therefore shows that the risk of compulsion has been reduced and that there has been a reasonable margin for negotiation with the beneficiaries of those policies. Explanations of this blandness can be found in the 'soft' nature of the Portuguese welfare state and with any other of the reasons which identify Portugal as a semi-peripheral or an intermediate development country (Santos, 1993; Ferrera, 1996; Mozzicafreddo, 1997).

However, things are changing. Given both the increasing Europeanisation of Portuguese policies and the growing pressure upon institutions for an efficient management of resources in an area where most of the financing comes from European funds, there are signs that the compulsory side of activation is growing. That is the case of a recent change in the regime of insertion designed for the recipients of GMI that came to reduce dramatically their negotiating margin of manoeuvre, and make their resistance to the ready-to-wear character of policies be judged illegitimate, and therefore undeserving of protection.

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