

Annotated Bibliography



# Social Services

in Europe

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Bibliography



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Observatory for the  
Development of Social Services  
in Europe



Observatory for the  
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in Europe

Observatorium für die  
Entwicklung der sozialen Dienste  
in Europa



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# **Social Services in Europe**

## **An Annotated Bibliography**

edited by

Helmut K. Anheier  
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Department of Social Policy  
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October 2000

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## Preface

In 1999, the Frankfurt-based Institute for Social Work and Social Pedagogy (ISS) decided to carry out a major review of social service delivery systems in Europe. The long-term objective behind this effort is to develop a European Information System on Social Services. As an initial part of this project, ISS commissioned the present study for the purpose of producing a compendium of current social service literature in EU countries.

Specially, for each member country, the study offers a succinct summary of the social service system, and then provides a bibliographical assessment of core literature on key issues and fields in the social service area following a common structure. The objective is, that by reading the country chapter, the reader should have a fairly good idea of how social services are organised, financed and delivered (Part A), what the state of social science knowledge is (Parts B and C), and what current policy issues and trends are in each of the fifteen member countries (Part D). An extended subject index at the end of the book assists readers in finding specific topics and issues across the different country chapters.

The bibliography covers only published social science literature that appeared in the form of *journal articles, chapters, and books*. It does not cover government documents and publications such as white papers, laws and legal documents, nor relevant reports in trade journals, the press and the media at large. For the most part, country reports also do not cover grey literature. We hope to cover these sources in a follow-up project.

## **Acknowledgements**

This annotated bibliography owes much to the efforts of others. I would like to thank Mr. Linzbach of the Federal Ministry of Family, the Elderly, Women and Youths in Berlin, Mr. Weigel, Director of the ISS in Frankfurt for suggesting this work initially and for supporting it throughout. Thanks are also due to Mr. Albers and Mrs. Holzer of ISS for helping to develop the project, and to Mr. Dirk Jarré for helping to clarify important cross-national issues in the field. Lisa Alfredson is the true hero of this effort: her editing and indexing skills turned drafts into publishable contributions, and made this bibliography more than the sum of its parts. Finally, many thanks are owed to Jane Schiemann for administrating the project and for managing communications with the various contributors in the fifteen countries.

## Precis

Social policies and social service delivery as well as social service finance systems in the European Union are undergoing far-reaching changes and are facing major challenges. To a large extent, these changes are triggered by demographic, social and economic trends and subsequent increases and shifts in demands for personal social services of all kinds. Unfortunately, our understanding of these changes and their impact on social service systems across EU member states remains limited. The present annotated bibliography of social services in the fifteen member countries of the European Union is intended to take a first step to remedy this situation. It does so by providing the reader with succinct summaries of some of the core works in the field on a country by country basis, covering a range of social service fields and topics.

# Social Services in Europe: Improving Cross-National Information

*By Helmut K. Anheier*

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## Why this book?

The different social service systems in Europe are at the core of the social and political fabric of member states. They are at the nexus between economic and social realms and as such closely related to social stability at the macro-level and basic security at the individual level. Because of changing conditions, social service systems are facing crucial challenges. These will be further amplified by two major developments during the coming decade. The first is the extension of EU membership to new countries, particularly in Central and Eastern Europe. The second development at the European level lies in the growing volume of cross-border social service delivery as part of the free movement of services, labour and capital among member states.

It is important to keep in mind that these developments take place in the context of very different national laws in terms of service eligibility and coverage, involve different financial arrangements and different types of organisations in actual service provision. Even though the European Commission has limited direct competence in social affairs – which principally remains a matter of member state responsibility – social services are thus set to become increasingly relevant to EU concerns. In order to deal with the complex policy challenges across a broad range of fields, the EU and member states urgently need information about social services.

In this context, moreover, the academic community needs more and better information on social services for the development and testing of theories about social service delivery and finance systems in order to inform policy-making. Cross-national understanding of social services in Europe, i.e., the comparative advantages and disadvantages associated with particular finance and delivery systems, and the policy implications they entail, remains very incomplete. The efforts of social scientists in the field of comparative social policy are continuously frustrated by the lack of systematic and comparative information on social services (Clasen, 1999; European Commission, 1994; Alber, 1995; Deacon et al. 1995).

Against this background, the collection of chapters in the book is intended to serve as an initial step toward greater understanding of Europe's social service systems. We are well aware that the systematic description and analysis of social services in a European context has barely begun. Of course, comparative research

on social services in the various European countries has a long tradition, and has gathered momentum in recent years (e.g., Clasen, 1999; Evers and Svetlik, 1993; Leibfried and Pierson, 1995; Deacon et al. 1995). But little systematic work has been done cross-nationally at the European level in an empirical sense that goes beyond a relatively well defined type of service (day care) for a beneficiary group (children, elderly etc). As a result, there is a growing hiatus between more abstract policy approaches and the detailed analysis of specific fields.

The policy community in Brussels and the national levels are frequently faced with the great challenge of coming to terms with the very different national cultures, laws and policies in the social service field. While the Union has achieved some common policy terrain in other fields like agriculture, manufacturing or banking, it lacks such a platform when it comes to social services. The bibliography and the extensive index system provided here may help create a common terminology and greater cross-national understanding in the field of social services.

## **Towards a European Information System on Social Services**

As recent as ten years ago, policymakers and scholars could work on the assumption that social and health policy were largely a matter of member states' and national concerns (de Swaan, 1992). Initially, and according to the Treaty of Rome, the EU had only a most limited competence in social affairs. This changed with the Treaties of Maastricht and Amsterdam, when EU competencies were somewhat expanded. Although the full implications of greater EU competencies in social affairs are long-term and are difficult to gauge at present, it seems likely that we are at the beginning of a process of Europeanisation of social services and social security systems.

Within the framework set by the Maastricht and Amsterdam Treaties, social security, health care and social services will be organised according to the principle of subsidiarity. This means that the EU would gain only as much legal and political competence as needed, whereas member states would retain the highest level of policymaking capacity as possible. At the same time, however, this basic framework is being tested from various sides:

The subsidiarity framework is a largely formal principle, but lacks substantive content in terms of social policy objectives and directives. The goals of European social policy remain fragmentary, and remain subject to developments in other policy fields that are more advanced in their objectives, in particular enterprise and competition policies. As a result, observers like Leibfried and Pierson (1999) point to a slow erosion of state sovereignty in the social policy field which de

facto limits the capacity of member states to design and implement adequate measures at member state levels.

Even though the European Commission had no central role in social policy until recently, Article 137 of the Amsterdam Treaty changed this in a significant way and allocated competency to the EU in a number of major fields. Moreover, the number of fields explicitly exempted from EU policy competence has been reduced. In this context we find a clear example of what analysts like Scharpf (1994) identified as a general deficit in EU policy-making: the capacity of the EU in terms of policy formulation, making and implementation does not grow at the same rate and quality that the capacity of member states is being reduced. As a result, there is a growing imbalance in legal competence, knowledge and expertise in social policy fields, carrying with it a great potential for unintended consequences and negative developments.

Next to direct measures (e.g., Article 137 of the Amsterdam Treaty), other EU activities have significant consequences for social policy. This is the case whenever the EU becomes active in policy fields that are linked to social services in the broadest sense. EU competition and deregulation policies, e.g., in the insurance industry, may have repercussions on the financing of social services and change the cost and revenue situation of provider organisations.

Related to this is the greater marketability of some social services, which attracts commercial providers, in addition to the more traditional organisations in the field, typically either nonprofit organisations or public (state) agencies. The introduction of long-term care insurance in Germany in 1995, for example, brought with it a substantial growth in the number of for-profit providers in a field that had traditionally been populated by charities and similar organisations.

At the same time, fuelled *inter alia* by the greater mobility of employers, employees and professionals and retirees alike, there is growing demand for cross-border provision of social services. Particularly in the aftermath of recent decisions by the European Court of Justice, e.g., Kohll (C-158/96), Decker (C-120/95), and Regione Lombardia (C-70/95), it is likely that the social security and social service systems of member countries will become increasingly open. In this context, many critical questions arise in terms of competition among social service systems and the associated problems of social dumping and free riding, leaving aside the immense array of technical and administrative issues when it comes to eligibility, accountability, and financial coverage of what kind of services to what type of user.

European social policy is thus confronted with great challenges, which will become even more acute with the scheduled accession of countries from Central

and Eastern Europe. Most likely, social policies at the EU level and in individual member states are likely to change in the coming years due to increased demand, marketisation, free flow of goods and services and other factors. Given these challenges, it would be necessary to develop effective and innovative policies, to test different policy scenarios, to explore the implications and effects of policy decisions on the quantity and quality of social services supplied, etc. Unfortunately, any such attempt to develop a forward looking European social policy in the field of social services continues to be frustrated by the lack of information.

Indeed, the paucity of systematic and comparable data in the field of social services is surprising, given the expected changes and the political sensitivities involved. Only a few attempts have been made in the past, most notably at the more general level the Luxembourg income studies (O'Higgins et al. 1990), and the family policy data base at the University of Mannheim (Bahle and Maucher, 1998). What is more, information is collected at national levels, with little regard for cross-border and EU-related aspects. Examples are the National Information System on Social Services in Italy, or the National Information Centre on Social Security, established in the Czech Republic with EU support. As a result social policy in Europe faces a double challenge. On the one hand, at the EU level, social policy remains formalistic, with no substantive vision of what a future European social policy should look like in terms of objectives and major policy parameters (equity issues, etc). On the other hand, no information system is in place that could help the EU and member states, let alone other stakeholders, to develop medium to long term policies and strategies.

Central in this respect are questions of definition and coverage. Member states vary in their definition of social services and the extent to which definitions cover some types of services rather than others. Clearly, developing a common definition of social services is not something that can be imposed; rather, it needs to be developed over time and against the realities of member states. The approach to developing a common definition through the systematic comparison of national definitions has proven success in related contexts, such as the Luxembourg Income Study (O'Higgins et al. 1990) or the Johns Hopkins Comparative Nonprofit Sector Project (Salamon and Anheier, 1997)

Although a common definition of what constitutes social services still has to be developed, it may be useful to focus on personal social services (German: "personenbezogene soziale Dienstleistung"; French: "*service de proximité*"), i.e., services that are provided by a third party to the benefit of a user or client. This would exclude social security payments and related financial assistance as well as education and health care. Public, nonprofit, for-profit organisations as well as individuals may deliver the service. Typically, financing and delivering social services includes different organisations.

## Looking Forward

The fundamental problem in the field of social services is that, at the European level, no comparative and systematic information exists for assisting policymakers and researchers in assessing, developing, implementing and monitoring adequate policies and measures. Such a system, once developed, could assist in addressing the challenges and opportunities that lie ahead for social service financing and delivery, including the impact of cross-border transactions. Ideally, such an information system would include data on supply and demand, import and export of services, financing models and financial flows, delivery systems, client profiles and other relevant quantitative and qualitative data on the full range of social services. The present bibliography is a small but nonetheless necessary and important step toward such a system.

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## **A Note on the Structure of the Country Chapters**

*By Helmut K. Anheier*

This is a cross-disciplinary bibliography that draws from economics, sociology, political science, social work, legal studies, history and any other major social science.

### **Definition**

By social services we refer to *personal* social services delivered by public, non-profit or for-profit providers, including self-help initiatives. The definition excludes education, culture, sports, and financial payments based on social security insurance. In other words: a tangible service must be provided by one person for another, not simply a monetary transaction as in the case of health care benefits, child care benefits, pensions, social security benefits and the like. For the purposes of this bibliography, we also exclude health services and medical care as such (hospital-based and medical practice-based in-patient and outpatient health care).

Much of the social service literature refers to specific fields or client groups such as families, youth, HIV/AIDS or the elderly. In Part B, the country chapters focus on works that are either more general in nature, i.e., cover a range of social services, or that are more specific but with implications for other fields, i.e. a paper on family services with results that are relevant for other types of services as well. Part C deals with specific fields, although they frequently cross-reference works listed in Part B. Specifically, the basic full structure of the country chapters is as follows:

#### *Outline of Country Chapters*

### **A. Synopsis of Social Service System**

**This overview of social service finance and delivery systems cover topics such as:**

- **definition of social services commonly used in the country**
- **major social and economic indicators of social service provision such as output**  
**and**
- **capacity measures; size of social service economy (employment, expenditures,**  
**clients served)**
- **system of government spending on social services by type**
- **model of social service financing more generally: who finances what and**

for

whom?

- models of social service delivery: who provides what to whom?
- major laws relevant to social service delivery system.

## B. Annotated Bibliography

Major works on topics such as:

- social services and the welfare system that are of a more comprehensive nature;
  - overview volumes; “classics” in the field
- supply and demand of social services
- definition, forms and types of social services
- organisational aspects, forms, ownership, and auspices of provider (e.g., state-run; quangos; for-profits; nonprofit organisations)
- social service financing
- staff and volunteers
- clients, users, and consumer issues, profiles
- efficiency, effectiveness and equity of social service provision and financing
- patterns of relations (co-operation and conflict) among providers, including
  - private-public partnership
- innovation and change
- Europe union and globalisation issues
- bureaucratisation and/or commercialisation problems
- comparative, cross-national issues
- current trends and policy issues; predictions
- Other topics not elsewhere covered.

## C. Special Fields

Fields typically covered are:

- Child and Youth Welfare
- Family services
- Frail elderly, nursing homes, long-term care
- Health care related social services, convalescence and rehabilitation
- Handicapped
- Homeless, the poor, poverty
- Unemployed
- Immigrants and refugees

## D. Summary assessment of current debates and development

**An Annotated Bibliography of  
Social Services:  
Country Chapters**

# Austria

by Heidrun Fitz and Birgit Trukeschitz

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## A. Synopsis of the Social Service System

In Austria there is no consistent definition of social services in the literature. The directory of social service institutions published by the Ministry of Social Affairs states that “suppliers of social services are public as well as private institutions. With their professional assistance they enable the elderly, the sick and the disabled to stay at home in the environment they are used to or to postpone their transition to an institution of non-residential care for disabled or old people as well as nursing homes” (Bundesministerium für Arbeit, Gesundheit und Soziales, 1997. *Soziale Dienste in Österreich – Ost*. Wien: BMAGS). In the academic literature social services are defined on a broader basis, including customised services in the field of citizen advice, public health, education, treatment, care giving and nursing (Badelt, 1997: 184).

Social and economic indicators of social services, such as employment, expenses, and client population, are not currently documented across social service areas. However, detailed statistics can be found in regional surveys, studies of specific client groups, and information provided by individual organisations such as Caritas. There are also statistics on particular types of organisations, such as non-profit social service providers. According to Bachstein (1997: 12) there are 94,950 paid employees and 151,681 voluntary individuals working in these organisations. However, empirical studies are rare, and social service employment potential may be underestimated. Characteristic of social services is the customised nature of service, which requires a large proportion of expenditures on personnel costs (often 70–80%). Expenditure by nonprofit organisations studied amount to 30 million Schilling or 30.9 million Schilling in value added (Bachstein, 1997).

Public funds are an important source of finance for social services. Residential social services are financed in part through health insurance. Institutions providing social assistance (federal states, social assistance organisations and municipalities) are more important sources of finance (Badelt/Österle, 1998: 124). Data from nonprofit social service providers can also be used to illustrate the revenue structure of organisations in the field more generally. Reimbursements for services (by beneficiaries, central government, federal states, municipalities, and social insurance institutions, etc.) comprise 68.3%, direct subsidies account for 18.8%, donations and member contributions amount to 7.5%, and other sources are 5.9% of the total revenue. The financing structure of larger institutions differs

from smaller organisations, with the former receiving more direct subsidies (Bachstein, 1997: 18 und 26).

Badelt (1997: 190f.) argues that social service production is cost intensive due to a high number of employees and low possibilities for economising. Social services provision through the market would exclude low income client groups from access. For some social services there is a political declaration ensuring minimal provision. This can be seen for example in care for the elderly and for the integration of the disabled. For other social services such as pre-school child care a de-facto guarantee is contested.

Legislation on social services is not consistent throughout Austria. Federal legislation addresses only general aspects of social services finance and delivery. Actual administrative arrangements are regulated separately by the nine federal states. In Vienna, for example, social services legislation covers the following: collaborative measures between central government and the federal state concerning individuals in need of care; youth welfare; assistance for the disabled, social welfare, and care benefits in cash. All regulations concerning Austrian national legislation and the legislation of federal states can be found at the homepage of the legal information system of the office of the chancellor (<http://www.ris.bka.gv.at/>).

## **B. Annotated Bibliography on Social Services**

### **1. Comprehensive works, overview volumes, classics on social services and the welfare system**

Badelt, Christoph und August Österle. 1998. *Grundzüge der Sozialpolitik – Spezieller Teil: Sozialpolitik in Österreich*. [Introduction to social policy – social policy in Austria]. Wien: Manz

This book offers a comprehensive overview of Austrian social policy. In particular it describes the policy fields of health, disability, the elderly, families, unemployment, poverty and social exclusion, and demonstrates their integration into social services. The authors also discuss problems and issues in different fields and for specific target groups, and present the aims, institutions, instruments and current problems of social policy.

Badelt, Christoph. 1997. "Soziale Dienstleistungen und der Umbau des Sozialstaats". [Social services and the reconstruction of the welfare state?]. Pp. 181-220. In Hauser, Richard (ed.) *Reform des Sozialstaats I: Arbeitsmarkt, soziale Sicherung und soziale Dienstleistungen*, Schriften des Vereins für Socialpolitik, Neue Folge, Band 251/I. Berlin: Duncker & Humblot.

In this paper Badelt demonstrates that questions concerning the delivery, financing and distribution of social services are as important as those concerning basic material provision. To solve social service problems satisfactorily, all these challenges must be faced. Badelt discusses the role and peculiarities of social services in the welfare state, and examines the options for social services reform both from theoretical and empirical points of view.

Badelt, Christoph. 1994. "Soziale Dienste – eine ökonomische Herausforderung an den Wohlfahrtsstaat". [Social services – a challenge to the welfare state?]. Pp. 75-93. In Chaloupek, Günther und Bruno Roßmann (eds.) *Die Zukunft des Wohlfahrtsstaates: Tagung der Kammer für Arbeiter und Angestellte für Wien*. Wien: Orac.

In this paper Badelt examines the delivery, financing and distribution of social services. He describes the original situation of the welfare discussion from the perspective of social services, and briefly reviews the aims and current problems of the welfare state. He then addresses specific social services problems, in particular the contradiction between increasing demand for services and difficulties of supply. The author then analyses whether through greater "efficiency" in social service production, rising needs and bottlenecks in public spending can be overcome.

Tálos, Emmerich und Karl Wörister. 1998. "Soziale Sicherung in Österreich". [Social services in Austria]. Pp. 209-288. In Tálos, Emmerich (ed.). *Soziale Sicherung im Wandel – Österreich und seine Nachbarstaaten. Ein Vergleich*. Wien: Böhlau.

Tálos and Wörister present the complete system of social security in Austria and offer a survey of the form and financing of social benefits in cash and in kind, and their development since the early 1980s. The presentation of social security systems in selected Western and Eastern European countries allows cross-country comparisons, discussed in the last contribution in this volume.

Österle, August. 1999. *Equity in the Provision of Long-Term Care: A Comparison of Austria, Italy, the Netherlands and the United Kingdom*. EUF Working Paper No. 99/18. European University Institute Florence.

Österle analyses the different approaches to achieving justice in the provision of long-term care in several countries. After a conceptual introduction he presents the long-term-care system in Austria, Italy, the Netherlands and Great Britain. Systems of care are analysed while considering the aims of justice in the welfare state. Based on a summary of political trends the consequences of decisions for those in need of care are discussed.

## 2. Supply and demand of social services

Dornmayer, Helmut, Karina Göttlicher, Hansjörg Seckauer, Christine Stelzer-Orthofer. 1993. "Bedarf und soziales Dienstleistungsangebot". [Demand and sup-

ply for social services]. Pp. 127-196. In Bacher, Johann (ed.) *Handlungsfelder kommunaler Sozialpolitik. Eine sozialwissenschaftliche Fallstudie am Beispiel der Stadt Wels*. Linz: Sozialwissenschaftliche Vereinigung.

The authors offer a general explanation of the term “social services” and then discuss their structure detail. In the subchapter „residential old age assistance”, the need for such care is estimated and its viability as an alternative for institutional care is discussed. The aims and tasks of residential services are described and a typology of beneficiaries is drawn. The chapter on “housing” deals with the socio-political field of care, especially with the publicly influenced housing market sector and the housing situation of marginalised groups.

Ertl, Regina und Berta Schrems. 1997. *Evaluation von Hauskrankenpflege-Angeboten in Wien. Unter dem Aspekt der Bedürfnis- und Bedarfsorientierung*. [Evaluation in home health care services]. Wien: Dachverband der Wiener Pflege- und Sozialdienste.

Ertl and Schrems describe home care as the original form of care for the sick. After describing the current situation in Vienna and theories of need and care by Olbrecht and Orem, the authors present the methods and results of their evaluation, showing the nominal and actual need for care and nursing. They then discuss deficits in self-help, differences in needs and demand, and aspects of personnel management.

Mesch, Michael (ed.). 1998. *Neue Arbeitsplätze in Österreich: Die Beschäftigungsentwicklung im österreichischen Dienstleistungssektor*. [New jobs in Austria: employment trends in the Austrian service sector]. Wien: Manz.

This edited volume addresses the development of the service sector in Austria from an economic perspective. The structure is formed by the theoretical aspects of structural change and by the results of relevant empirical studies. Part II presents a survey on employment trends in Austrian social services and individual social service fields from 1970 to 1997, and the causes of these developments.

Denk, Günter und Helmuth Schattovits. 1995. *Teilzeitbetreuung von Kindern in Österreich – Eine Bestandsaufnahme zur Orientierung über Formen, Kosten und Finanzierung*. [Forms, expenditure and financing of part-time care services for children]. Wien: Österreichisches Institut für Familienforschung.

In public discussions of child care the main topic of discussion is often kindergarten and care for children under age four. Denk and Schattovits offer a more holistic discussion, describing the situation in Austria (day care centres, “day mothers”, self-organised children’s groups) and discussing a regional study in the federal state Tirol. They present ideas on comparative approaches as well as financial need (using model calculations), and elucidate findings and consequences.

Schaffenberg, Eva, Brigitte Juraszovich und Elisabeth Pochobradsky. 1999. *Dienste und Einrichtungen für pflegebedürftige Menschen in Österreich – Übersicht über die Bedarfs- und Entwicklungspläne der Länder*. [Supply and demand for care services in the Austrian states]. Wien: Österreichisches Bundesinstitut für Gesundheitswesen.

All federal states in Austria are required to develop plans concerning needs and necessary social services in order to set up a network of social service supply. The authors present a survey of the most relevant information from such plans. They report on the current situation and probable development of infrastructure for individuals needing care in the next ten years (status quo and ideal conditions). The costs and financing of services and institutions are analysed in detail for the elderly and the disabled.

Wallner-Ewald, Stephan. 1999. *Verarmungsrisiken im Wohlfahrtsstaat II: Leben am Rande des Sozialsystems – Die Klientinnen und Klienten der Sozialberatungsstellen der Caritas Österreich*. [Risk of poverty and the welfare state]. Wien: Julius-Raab-Stiftung.

This research addresses poverty and social exclusion. Wallner-Ewald clarifies poverty-related terms and presents the current situation in Austria. The Austrian social system is considered under the heading “Poverty policy in Austria”. In chapter 3 the social advice centres of Caritas, (called the “third net”), are presented. Chapter 4 analyses the clients of those advice centres, drawing conclusions from the study of the Caritas advice centres. Options for poverty policy are then debated.

### 3. Definition, forms and types of social services

Badelt, Christoph und Peter Weiss. 1990. “Non-profit, For-Profit and Government Organisations in Social Service Provision: Comparison of Behavioural Patterns for Austria” *Voluntas* 1(1): 77-96

In mixed economy systems social services are provided by non-profit, private for-profit, and public enterprises. Based on Weisbrod’s hypothesis of under-supply, involving differentiated consumer demand and the redistributive character of public interventions in the economy, Badelt and Weiss develop three hypotheses on the behaviour of different institutional suppliers: differentiation in clients, products and prices. These hypotheses are tested in empirical studies of kindergarten and nursing homes.

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag. The authors provide an introductory explanation of general aspects of the organisation of social services followed by detailed information on tasks and social ser-

vices for children, youth, adults, the disabled, delinquents, substance abusers, the mentally and physically ill, and the social integration of immigrants and the elderly. They look at community work and prevention measures and discuss in detail the situation of social service employees, in particular occupational images and the general problems of social work occupations and voluntary work.

Bachstein, Werner. 1997. *Der Nonprofit Sektor im Bereich sozialer Dienste: Ergebnisse einer quantitativen Primärerhebung*. [The nonprofit sector and social service provision]. Wien: Wirtschaftsuniversität Wien (working paper).

In this study Bachstein considers the various social tasks of the non-profit sector and the significant role of social organisations as employers. Bachstein presents results of a survey of both small and large organisations, and of sectors differentiated in paid and voluntary employment, financing value, production value and added value. Results demonstrate the non-profit sector's important role in social service provision.

#### **4. Organisational aspects, forms, ownership and auspices of provider**

In Badelt, Christoph (ed.) 1999. *Handbuch der Nonprofit Organisation – Strukturen und Management*. 2. Auflage. Stuttgart: Schäffer-Poeschel.

This handbook is a systematic guide for managing non-profit organisations, often referring to social services. Chapter 1.4 considers the Austrian non-profit sector. Chapter 4.1 provides a qualitative description of the non-profit sector in Austria, revealing the significant position of social services. Chapter 4.2 presents a quantitative survey of economic and sector specific indicators.

Badelt, Christoph. 1996. "Die Rolle von Non-profit-Organisationen als Anbieter sozialer Dienste – Einige ökonomische Überlegungen". [The role of nonprofit organisations as social services providers]. Pp. 75-83. In Moritz, Michaela et al. *Beiträge zur Theorie und Praxis sozialer Dienste – 50 Jahre Wiener Sozialdienste / Festschrift*. Wien: Stiepan.

In this paper Badelt argues for the expansion of social services delivery in Austria, describing social services as an uncontested growth market. He pleads for the security of services for the elderly, discusses the growing number and types of individuals needing care, and estimates the costs involved. He then elucidates the role of non-profit organisations, their potential achievement and the special challenges posed by quality assurance.

Badelt, Christoph. 1996. "Qualitätssicherung aus gesamtwirtschaftlicher und sozialpolitischer Perspektive". [Quality control in economic and social policy perspectives]. Pp. 9-23. In Maelicke, Bernd (ed.) *Qualitätsmanagement in sozialen Betrieben und Unternehmen*. Baden-Baden: Nomos Verlagsgesellschaft.

Quality assurance and improvement are amongst the most discussed topics in social policy, but discussions rarely take an aggregate economic perspective. At first sight, quality assurance seems more a problem of individual service producers than of social policy generally. Badelt tries to incorporate a macro perspective of quality assurance in his paper. He discusses quality assurance as a topic of research and politics, and the quality of individual social services from the perspective of social policy. Another chapter discusses quality aspects of social services provision to reveal normative aspects of quality assurance. Consequences for the social work environment are particularly interesting for social service practitioners.

Badelt, Christoph (ed.) 1995. *Qualitätssicherung in den Sozialen Diensten: Tagungsband*. [Quality control and social services]. Krems: Wissenschaftliche Landesakademie für Niederösterreich.

This edited collection outlines problems of quality assurance in social services and then discusses different aspects of quality assurance. Ruth Brack presents a wide survey on quality assurance in social work. Christian Matul discusses marketing and quality assurance in social services. Hans-Christoph Reiss looks at the problematic situation from the view point of controlling, while Badelt deals with social policy. Ernst Hider discusses the role of the labour market as a public funding institution in quality assurance for social services, and Herbert Prucher describes it from an administrative viewpoint. The book concludes with a discussion of “quality assurance in social services” for the disabled, the elderly, marginalised groups and the unemployed.

Ebner, Heinz und Peter Heimerl-Wagner. 1996. “Handhabung von Veränderungsprozessen in Gesundheitsorganisationen”. [Managing change in the health care system]. Pp. 379-450. In Heimerl-Wagner, Peter und Christian Köck (eds.) *Management in Gesundheitsorganisationen: Strategien, Qualität, Wandel*. Wien: Ueberreuter.

Ebner and Heimerl-Wagner’s chapter on the process of change in health organisations discusses the “how” of changes and possible paths for the future. The authors explain the main tension organisations face: security versus development. It is argued that preservation is a necessary precondition for change. They discuss dealing with this contradiction and fostering innovation processes.

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag.

The authors introduce general aspects of the organisation of social services and present detailed information on tasks and social services for children, youth, adults the disabled, delinquents, substance abusers, the mentally and physically ill, and the social integration of immigrants and the elderly. They look at com-

munity work and prevention measures and discuss in detail the situation of social service employees, in particular their occupational images and the general problems of social work occupations and voluntary work.

Matul, Christian. 1995. "Marketing und Qualitätssicherung der Sozialen Dienste". [Marketing and quality control in social service provision]. Pp. 41-58. In Badelt, Christoph (ed.) *Qualitätssicherung in den Sozialen Diensten: Tagungsband*. Krems: Wissenschaftliche Landesakademie für Niederösterreich.

For many people the relation between social services and marketing is unclear, and for Matul this can be explained by the fact that marketing ideas come from the for-profit sector. Matul explains basic features of marketing and the contributions marketing can offer to quality assurance in social services. He discusses the general philosophy of marketing, and presents methods and instruments of marketing and marketing management.

## 5. Financing

Bacher, Johann und Christine Stelzer-Orthofer. 1993. "Sozialbudgetanalyse: Ausgaben, Finanzierung und sozialpolitische Bewertung der sozialen Dienstleistungen". [Social budget analysis and social services]. Pp. 45-125. In Bacher, Johann (ed.) *Handlungsfelder kommunaler Sozialpolitik. Eine sozialwissenschaftliche Fallstudie am Beispiel der Stadt Wels*. Linz: Sozialwissenschaftliche Vereinigung.

The authors present a survey of municipal social expenditure, focusing on aims and social budget analysis, the budget structure and development. They then offer detailed considerations of the financing of child day care and the social budget analysis for senior citizens.

Badelt, Christoph und Kai Leichsenring. 1999. "Versorgung, Betreuung, Pflege". [Care and assistance for the elderly]. In Bundesministerium für Umwelt, Jugend und Familie (ed.) *Bericht zur Lebenssituation älterer Menschen in Österreich* Wien: Bundesministerium für Umwelt, Jugend und Familie (Veröffentlichung im Februar 2000 geplant).

The need for care in old age is a complex problem. This paper surveys existing empirical evidence on needs in old age in Austria, and reflects on the social and economic situation of the elderly. The authors describe the organisation of care and the assistance of social services and institutions. They depict financing and needs for care in terms of federal state and central government expenses for such care, including nursing homes and residential services. Regulations about user contributions to social services are also discussed.

Bernhardt, Stefan. 1999. "Finanzierungsmanagement von NPOs". [Financial management of nonprofit organisations]. Pp. 301-330. In Badelt, Christoph (ed.) *Handbuch der Nonprofit Organisation – Strukturen und Management*. 2. Auflage. Stuttgart: Schäffer-Poeschel.

Bernhardt provides an overview of terms and possibilities in nonprofit financing of social services. He discusses the most important forms of finance such as credits, member contributions, sponsoring, fundraising and public subsidies. He then addresses the problem of financial planning, presenting a set of instruments for developing strategies to diversify nonprofit revenue.

Egger, Barbara. 1999. *Gesundheitswesen in Österreich: Gegebenheiten, Tendenzen, Entwicklungen*. [Health care in Austria]. Wien: Volkswirtschaftliche Verlagsgesellschaft G.m.b.H. (Loseblattsammlung).

Updated twice each year, this report on the Austrian health care system includes a chapter on financing the health sector both in social and private health insurance and in hospitals. The report discusses how hospital finances flow between central government, federal states and municipalities, and presents models for reforming health system finances.

Stephan, Adolf (ed.) 1997. *Finanzierungssysteme im Gesundheitswesen: Ein internationaler Vergleich*. [Health care finance systems]. Wien: Manz.

Stephan presents the basic conditions of financing the health system, followed by six case studies of European countries and the USA. He concludes with a comparison of case studies regarding fundraising and fund transfer. The Austrian paper discusses the basic conditions and possible influences on health system finances.

Denk, Günter und Helmuth Schattovits. 1995. *Teilzeitbetreuung von Kindern in Österreich – Eine Bestandsaufnahme zur Orientierung über Formen, Kosten und Finanzierung*. [Forms, expenditure and financing of part-time care services for children]. Wien: Österreichisches Institut für Familienforschung.

This book focuses on forms of child care in Austria. Financial aspects are considered particularly in chapters 5 and 6, where Denk and Schattovits carry out cost estimates for child care institutions. They look at the costs of running and building kindergardens and then show costs for other forms of care. Using model calculations the authors present the financial need for child care for those under age four, and the public expenses for this care.

## 6. Staff and volunteers

Badelt, Christoph. 1999. "Ehrenamtliche Arbeit im Nonprofit Sektor." [Voluntary work in the nonprofit sector]. Pp. 433-462. In Badelt, Christoph (ed.)

*Handbuch der Nonprofit Organisation – Strukturen und Management*. 2. Auflage. Stuttgart: Schäffer-Poeschel.

Voluntary work is an important phenomenon throughout society, particularly in health and social service fields. This paper focuses on basic social and economic questions relating to voluntary work. Badelt defines volunteering and presents a survey of its quantitative extent, task ranges and socio-economic structure. Explanatory factors of voluntary work and its political context conclude this overview.

Badelt, Christoph. 1997. *Quantitative Dimensionen des Nonprofit Sektors in Österreich*. [Quantitative dimensions of the nonprofit sector in Austria]. Wien: Fonds zur Förderung der wissenschaftlichen Forschung. Abschlussbericht. Projektnummer P 10553-SOZ.

In this project, empirical studies and comprehensive secondary sources providing statistical interpretations are used together to describe the non-profit sector in Austria. The “social services” chapter analyses employment, financing, output and production value in child care, youth work outside schools, disaster prevention and emergency protection. Economic indicators of residential and non-residential health care institutions and nursing homes are considered in the chapter on health. This study contains comprehensive calculations of numbers of employees and voluntary workers in these fields.

Badelt, Christoph. 1990. “Unbezahlte Arbeit in den Sozialen Diensten”. [Unpaid work in social services]. Pp. 107-124. In Heinze, Rolf G. und Claus Offe (eds.) *Formen der Eigenarbeit: Theorie, Empirie, Vorschläge*. Opladen: Westdeutscher Verlag.

Unpaid work is increasingly a topic of social policy, particularly social services. This study discusses the relevance and position of unpaid work and depicts the quantitative relevance of voluntary work in Austria. The demands and expectations toward unpaid work in social services, and the image of this work in Austria, are described in relation to social policy.

Klicpera, Christian und Barbara Gasteiger – Klicpera. 1997. “Die Situation der Mitarbeiter in den sozialen Diensten”. [On the situation of social service employees]. In Klicpera, Christian und Barbara Gasteiger-Klicpera (eds.) *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. 3. Auflage. Wien: WUV-Universitätsverlag.

This article discusses the situation of social service employees. Occupational images, common problems and possible solutions are presented in detail, followed by a final section on volunteers.

Bronneberg, Gertrud, Wilhelm Frank, Elisabeth Pochobradsky und Sabine Vogler. 1997. *Arbeitssituation: Ambulante Pflege- und Sozialdienste Wiens*. [Work sit-

uation for social service providers and care givers]. Wien: Österreichisches Bundesinstitut für Gesundheitswesen.

This study analyses the working conditions of employees in member organisations of the umbrella organisation of care and social services in Vienna. Four occupational groups are considered: care personnel with diploma, care assistants, assistants in nursing homes, and visiting services. The study describes task ranges, basic conditions and dimensions of work organisation in residential services, and maps the consequent burden on employees. Recommendations for reducing or removing those burdens are offered.

## 7. Clients

Evers, Adalbert, Kai Leichsenring und Charlotte Strümpel (eds.). 1995. *Klientenrechte – Sozialpolitische Steuerung der Qualität von Hilfe und Pflege im Alter*. [Client-oriented care and social services]. Tagung zum Europäischen Jahr der älteren Menschen und der Solidarität zwischen den Generationen. Schriftenreihe „Soziales Europa“. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales. This book presents papers from a conference on the position of social service clients. It discusses quality assurance in social services planning, which considers client-interests and the situation of caring relatives, ensures individuality and flexibility, and preserves and expands client claims.

Evers, Adalbert. 1989. “Debating Citizens’ Role in Social Services – Some Central Questions”. Pp. 5-9. In European Centre for Social Welfare, *Clients or co-producers? – The changing role of Citizens in Social Services*. Helsinki: The National Board of Social Welfare in Finland.

Evers argues that social services clients are in danger of being regarded as isolated objects rather than inherent elements of social networks. This article elucidates women’s role in social services, the integration of formal and informal elements in social services and the privatisation of social services.

Pfeil, Walter J., 1995. “Klientenrechte: Bisherige Grundlagen und Perspektiven aufgrund der neuen Pflegevorsorge”. [Client rights and care services]. Pp.161-174. In Evers, Adalbert, Kai Leichsenring und Charlotte Strümpel (eds.) 1995. *Klientenrechte – Sozialpolitische Steuerung der Qualität von Hilfe und Pflege im Alter*. Tagung zum Europäischen Jahr der älteren Menschen und der Solidarität zwischen den Generationen. Schriftenreihe „Soziales Europa“. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

Assistance and care have become independent forms of social service both in residential and non-residential institutions. Pfeil discusses legal provisions to protect client interests and needs in these institutions, and analyses federal care benefits in cash and the agreement between central government and the states.

Wallner-Ewald, Stephan. 1999. *Verarmungsrisiken im Wohlfahrtsstaat II: Leben am Rande des Sozialsystems – Die Klientinnen und Klienten der Sozialberatungsstellen der Caritas Österreich*. [Risk of poverty in the welfare state]. Wien: Julius-Raab-Stiftung.

Wallner-Ewald presents research into poverty and social exclusion in Austria. He first clarifies poverty-related terms and presents the current situation in Austria. The Austrian social system is considered under the heading „Poverty policy in Austria“. In chapter 3 the social advice centres of Caritas, (called the „third net“), are presented. Chapter 4 analyses the clients of those advice centres. Options for poverty policy are then debated.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Badelt, Christoph, Andrea Holzmann, Christian Matul und August Österle. 1995. *Kosten der Pflegesicherung: Strukturen und Entwicklungstrends der Altenbetreuung*. [The costs of long-terms care insurance]. Wien: Böhlau.

This book discusses the organisation and financing of elderly care and nursing services. Using comprehensive empirical studies it presents different ways of mapping the costs of care and discusses the cost structures of residential and non-residential institutions. The authors then present four main suggestions for ensuring services for old people on a long-term basis.

Badelt, Christoph. 1994. „Kosten-Effektivitäts-Analyse zur Wirtschaftlichkeits- und Qualitätskontrolle sozialer Dienste“. [Cost-benefit analysis of efficiency and quality control of social services]. Pp. 85-108. In Knappe, Eckhard und Stephan Burger (eds.) *Wirtschaftlichkeit und Qualitätssicherung in sozialen Diensten*. Frankfurt/New York: Campus.

Badelt considers ways of bringing an economic perspective into social work, and presents a cost-efficiency analysis of work with the disabled. The criteria for judging the success of social services may be derived through quite different approaches depending on the economic or social work context. Cost-efficiency analysis is intended to reveal in a transparent way the degree to which the multidimensional aims of social services are achieved. Badelt uses a specific employment model to discuss advantages and disadvantages of the analysis, and concludes by considering the possible effects of such analysis on quality assurance in social services.

Badelt, Christoph (ed.) 1992. *Geschützte Arbeit – Alternative Beschäftigungsformen zur beruflichen und sozialen Integration behinderter*. [Sheltered work – alternative employment forms and integration of the disabled]. Menschen. Wien: Böhlau.

The three papers in this book discuss the employment integration of disabled people, taking up debates about “supported employment” which have been neglected. The first part of the book presents basic ideas underlying the term “disability” and analyses labour market policy and problematic areas or gaps in the existing system. The second part presents a new model for the social and employment integration of the disabled in Austria, and evaluates it through a cost-effect analysis. The third part discusses conflicts in sheltered workshops.

Österle, August. 1999. *Equity in the Provision of Long-Term Care: A Comparison of Austria, Italy, the Netherlands and the United Kingdom*. EUF Working Paper No. 99/18. European University Institute Florence.

Österle analyses different approaches to achieving justice in the provision of long-term care in Austria, Italy, the Netherlands and Great Britain. After a conceptual introduction, systems of care are analysed in light of the aims of justice in the welfare state. The consequences for those in need of care are discussed based on a summary of political trends.

## 9. Patterns of relations among providers

Badelt, Christoph und August Österle. 1998. *Grundzüge der Sozialpolitik – Spezieller Teil: Sozialpolitik in Österreich*. [Introduction to social policy – social policy in Austria]. Wien: Manz.

This book offers an overview of legal regulations and quantitative facts of different areas of Austrian social policy. The chapter “Age and the need of care” discusses the provision of services for the elderly and others in need of care. It also presents a brief overview of “Sprenkel” – networks of different services offered locally.

Badelt, Christoph und Andrea Holzmann. 1992. “Integrierte Gesundheitsversorgung im Nahraum – Erfolgsbedingungen und Leistungsfähigkeit innovativer Strukturen am Beispiel der Tiroler Sozial- und Gesundheitssprengel”. [Integrated health care services]. *Kurswechsel* Nr. 2: 38-55.

Social services face financial and personnel bottlenecks and new demands for service quality. A core element of health system reform in Austria in the 1990s is the establishment of networked social and health institutions at the grassroots level. Badelt and Holzmann analyse the structures, task ranges and achievement capacity of such institutions, looking at improvements in provision among social and health “Sprenkel” (networks of services offered locally) in Tirol. These social services enhance the life quality of clients and their relatives while increasing efficiency and reducing costs.

Kain, Eva und Ingrid Rosian. 1997. *Partnerschaften zur Förderung des sozialen Zusammenhalts: Länderbericht Österreich*. Schriftenreihe ‘Soziales Europa’.

[Partnerships for the support of integration]. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

Partnerships among public institutions, private enterprises and non-profit organisations are regarded as key instruments against social exclusion, unemployment and poverty and for the promotion of social cohesion. Austrian and EU programmes encourage such structures at local and regional levels. In this volume the basic conditions, origins, aims and activities of local partnerships are presented alongside three case studies: social and health “Sprenkel” in Tirol, the women’s trust in Steyr and the employment creation initiative in Kärnten.

Rautner-Reiter, Ulrike. 1997. “Vernetzung sozialer Dienste in Krems – Ein Beispiel gemeinwesenorientierter Sozialarbeit am Land”. [Networking social services]. Pp. 161-173. In Lange, Josef und Kurt Fellöcker (eds.) *Sozialarbeit im ländlichen Raum: Handlungsfelder, methodische Ansätze und Konzepte*. St. Pölten: SozAktiv.

Rautner-Reiter describes the network of social services in the town of Krems, focusing in particular on resource issues and social work problems in the region. She presents examples of social service networks in the third chapter.

Schaffnerberger, Eva. 1995. “Qualitätsentwicklung durch Zusammenarbeit und Koordination: Das Beispiel der Integrierten Gesundheits- und Sozialsprengel (IGSS)”. [Quality development, co-operations and co-ordination in health and social services]. Pp. 213-220. In Evers, Adalbert, Kai Leichsenring und Charlotte Strümpel (eds.) 1995. *Klientenrechte – Sozialpolitische Steuerung der Qualität von Hilfe und Pflege im Alter*. Tagung zum Europäischen Jahr der älteren Menschen und der Solidarität zwischen den Generationen. Schriftenreihe ‘Soziales Europa’. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

Schaffnerberger summarises studies by the Austrian National Institute for Health System (ÖBIG) on integrated health and social „sprengel“ (networks of services offered locally) in Austria. These projects aim to improve health and social provision through collaboration and consensus amongst suppliers. The author discusses several crucial issues: the context of co-ordination and co-operation of suppliers and quality of service, describing why lack of co-ordination occurs, and the solution of integrated health and social “sprengel”.

## 10. Innovation and change

Badelt, Christoph, Andrea Holzmann, Christian Matul und August Österle. 1995. *Kosten der Pflegesicherung: Strukturen und Entwicklungstrends der Altenbetreuung*. [The costs of long-terms care insurance]. Wien: Böhlau.

This book discusses the organisation and financing of elderly care and nursing

services. Using comprehensive empirical studies it presents different ways of mapping the costs of care and compares the cost structures of care in residential and non-residential institutions. The authors then make four suggestions for ensuring services for the elderly on a long-term basis.

Schaffenberg, Eva, Brigitte Juraszovich und Elisabeth Pochobradsky. 1999. *Dienste und Einrichtungen für pflegebedürftige Menschen in Österreich – Übersicht über die Bedarfs- und Entwicklungspläne der Länder*. [Services and establishments for social and health care]. Wien: Österreichisches Bundesinstitut für Gesundheitswesen.

All federal states in Austria are required to provide a basic network of social services. The authors survey the most relevant information from federal plans and report on the current situation and probable development of infrastructure for individuals needing care in the next ten years (status quo and ideal conditions). Both the costs and the financing of services and institutions for the elderly and the disabled are analysed in detail.

## 11. European Union and globalisation issues

Kautto, Mikko (ed.) 1997. *European Social Services – Policies and Priorities to the Year 2000: A report from a European expert meeting on social care services: policies and priorities to the year 2000*. National Research and Development Centre for Welfare and Health. Helsinki: Ministry Of Social Affairs and Health.

This conference report discusses the challenges facing social services in Europe. The authors highlight different approaches to social services in Europe, using two main approaches: 1. a focus on political reactions the financial difficulties of social services in Europe; and 2. a focus on possible solutions to different forms of social exclusion in Europe. The last paper deals with social services and the role of the European Union.

## 12. Bureaucratisation and/or commercialisation problems

Badelt, Christoph. 1994. "Soziale Dienstleistungen zwischen wachsenden Ansprüchen und finanziellen Engpässen". [Social services between growing demand and financial bottlenecks]. Pp. 18-27. In Karsten, Maria-Elenora (ed.) *Dienstleistungsgesellschaft: Herausforderungen, Trends und Perspektiven*. Lüneburger Universitätschriften 6, Lüneburg.

Badelt characterises the role of social services in the service society. He discusses the demand for efficiency of social services and the consequences for education policy, providing examples from Austria to illustrate developments in the field of vocational training.

Badelt, Christoph. 1993. "Soziale Dienste und Wirtschaftlichkeit: Ansprüche und Widersprüche". [Social services, efficiency and contradictions]. Pp. 139-170. In Effinger, Herbert und Detlef Luthé (eds.) *Sozialmärkte und Management*. Bremen: Forschungsreihe des Forschungsschwerpunkts "Arbeit und Bildung" Band 26. Badelt illustrates the relation between economy and 'the social sphere' using examples from his own research in Austria. He draws conclusions for education policy by looking at the social and economic demands of the various social work task ranges. Empirical data is presented with a focus on the desire for further training among "social managers".

### 13. Comparative, cross-national issues

Bauer, Rudolf. 1996. *Soziale Dienstleistungen, Qualitätsdiskurse und die Entpolitisierung des Sozialstaates. Ein inhaltsanalytischer Drei-Länder-Vergleich. Schweizerische Zeitschrift für Politische Wissenschaft*. Deutschland, Österreich und die Schweiz im Vergleich. [Social services, quality debates and the depoliticisation of the welfare state]. Sonderheft, Zürich.

This special issue presents debates on the quality of social service provision. Part One provides a conceptual discussion. Part Two summarises empirical findings in Austria, Germany and Switzerland. Part Three explores cross-country consensus concerning economic efficiency and quality criteria.

Leichsenring, Kai. 1999. *Social Protection for Dependency in Old Age in Austria*. National Report Series of the Social Protection for Dependency in Old Age in the 15 EU Member States and Norway Project, edited by Jozef Pacolet & Ria Bouten. Leuven: Katholieke Universiteit Leuven.

This country report on the financing of social services for elderly people in Austria is part of a comparative study. It provides an overview of services for the elderly and insights into current and future political trends.

Pacolet, Jozef, Ria Bouten, Hilde Lanoye und Katia Versieck. 1999. *Sozialschutz bei Pflegebedürftigkeit im Alter in den 15 EU-Mitgliedstaaten und in Norwegen*. [Social protection and long-term care in old age in the EU and Norway]. Luxemburg: Amt für amtliche Veröffentlichungen der Europäischen Gemeinschaften.

This report discusses a comparative study of social protection systems in long-term-care for the elderly in the European Union. It studies the needs and risks of people needing care and describes current evaluations of political trends and perspectives. Chapter 4 focuses on the diversity, amount and range of health and social services for elderly people in different European countries.

Österle, August. 1999. *Equity in the Provision of Long-Term Care: A Comparison of Austria, Italy, the Netherlands and the United Kingdom*. EUF Working Paper No. 99/18. European University Institute Florence.

Österle analyses different approaches to achieving social equity in the provision of long-term care in Austria, Italy, the Netherlands and Great Britain. After a conceptual introduction he analyses systems of care in light of the aims of social justice in the welfare state. The consequences for those in need of care are discussed based on a summary of political trends.

## 14. Current trends, predictions

Badelt, Christoph, Andrea Holzmann, Christian Matul und August Österle. 1995. *Kosten der Pflegesicherung: Strukturen und Entwicklungstrends der Altenbetreuung*. [The costs of long-terms care insurance]. Wien: Böhlau.

This book discusses the organisation and financing of elderly care and nursing services. Using a comprehensive set of empirical studies it presents different ways of mapping the costs of care and compares the cost structures of care in residential and non-residential institutions. The authors then present four main suggestions for ensuring services for old people on a long-term basis.

## C. Special Fields Child and Youth Welfare

Badelt, Christoph und Peter Weiss. 1990. "Specialisation, Product Differentiation and Ownership Structure in Personal Social Services. The Case of Nursery Schools" In *Kyklos – Internationale Zeitschrift für Sozialwissenschaften* Vol. 43 (Fasc. 1): 69-89.

In mixed economy systems social services are provided by non-profit, private for-profit, and public enterprises. Based on Weisbrod's under-supply hypothesis the authors argue that different incentive structures prompt different behaviour amongst different types of suppliers. This hypothesis is supported in empirical studies of kindergardens. Forprofits specialise in market segments with low costs or those in which "economies of scope" are to be realised. Non-profits do not use cost minimising strategies which contradict their ideological aims. Forprofits react most to market situations and consumer needs while the supply of public and non-profit organisations is less influenced by these factors.

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag. The authors provide an overview of ways of organising social services and eluci-

date the task ranges of those services. The chapter on “social services for children, youths and their families” describes the Youth Department as the main social services institution for those groups and for assistance with education, family crises, child and youth protection. Public education and preparation of professional life are discussed at the end of the chapter.

Riepl, Barbara. 1998. “Außerfamiliale Kinderbetreuung”. [Child care outside families]. Pp. 191-208 In Kränzl-Nagl, Renate, Barbara Riepl und Helmut Wintersberger (eds.) *Kindheit in Gesellschaft und Politik – Eine multidisziplinäre Analyse am Beispiel Österreichs*. Wien: Campus.

The author provides a qualitative and quantitative overview of the different forms of child care in Austria – its historical development, current functions, and legal and financial foundations outside of the family. In conclusion, forms of care for the youngest children in the European Union are discussed.

Denk, Günter und Helmuth Schattovits. 1995. *Teilzeitbetreuung von Kindern in Österreich – Eine Bestandsaufnahme zur Orientierung über Formen, Kosten und Finanzierung*. [Forms, expenditure and financing of part-time care services for children]. Wien: Österreichisches Institut für Familienforschung.

In public discussions of child care the main topic is often kindergarden and care for children under age four. Denk and Schattovits offer a more holistic discussion, describing the situation in Austria (day care centres, “day mothers”, self-organised children’s groups) and discussing a regional study in the federal state Tirol. They present ideas on comparative approaches as well as financial need (using model calculations), and elucidate findings and consequences.

Neubauer, Christa. 1999. “Die sozialpädagogische Stadtteilbetreuung in Schwechat”. [Social paedagogy at local levels]. Pp. 59-62. In Leichsenring, Kai und Barbara Rosenberger (eds.) *Soziale Lösungen vor Ort: Neue Wege in der kommunalen Sozialpolitik*. Wien: Renner-Institut.

This article introduces the aims and activities of community care for children and unemployed youth from socially disadvantaged families in a municipality close to Vienna. Labour market policies and resources from the local community contribute to the establishment of such projects and increase the life chances of disadvantaged youths.

## Family services

Badelt, Christoph. 1996. “Family Policies in Austria in 1995”. Pp. 117-132. In Ditch, John, Helen Barnes und Jonathan Bradshaw (eds.) *Developments in National Family Policies in 1995, European Observatory on National Family Policies*. York: Social Policy Research Unit.

In joining the EU Austria had a opportunity to present its family policy system in this series. Badelt describes social services for children, older people and the disabled in the context of family policy. In the next volume (Ditch, John et al. 1998: 193-212) Badelt discusses developments and changes in Austrian family policy in 1996, especially forms of child care.

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag.

The authors provide an overview of ways of organising social services and elucidate the task ranges of those services. The chapter on “social services for children, youths and their families” describes the Youth Department as the main social services institution for those groups and for assistance with education, family crises, child and youth protection. Public education and preparation of professional life are discussed at the end of the chapter.

### **Frail elderly, nursing homes, long-term-care**

Badelt, Christoph und Andrea Holzmann. 1993. “Care for the Elderly in Austria: Innovative Projects on the Local Level”. Pp. 147-177. In Evers, Adalbert and Ivan Svetlik, (eds.) *Balancing Pluralism: New Welfare Mixes in Care for the Elderly*. Vienna. European Centre. Aldershot: Avebury.

Badelt and Holzmann examine care services for the elderly in Austria and introduce four projects in this field which are considered innovative and leading improvements on many levels (i.e. provision; work with relatives, employees).

Matul, Christian. 1995. “Qualität und Qualitätssicherung in der Altenhilfe – Ökonomische Perspektiven zur Hilfe und Pflege im Alter”. [Quality and quality control in care for the elderly]. Pp. 111-122. In Evers, Adalbert, Kai Leichenring und Charlotte Strümpel (eds.) 1995. *Klientenrechte – Sozialpolitische Steuerung der Qualität von Hilfe und Pflege im Alter. Tagung zum Europäischen Jahr der älteren Menschen und der Solidarität zwischen den Generationen. Schriftenreihe ‘Soziales Europa’*. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

Matul observes that the need for social assistance in old age will increase both quantitatively and qualitatively, and predicts changed demand profiles in old age welfare through needs-differentiated services, new provision structures and innovative care concepts. Quantity and quality assurance have micro-economic and macro-economic dimensions; both must be considered for the quality of elderly care to be improved.

Weekers, Sylvia. 1998. "A report from Austria". Pp. 59-85 in Weekers, Sylvia and Marja Pijl, *Homecare and care allowances in the European Union*, NIZW. Weekers offers an overview of the home care system in Austria and highlights its particularities. After presenting the health system and regulations on care allowance in cash, she gives an overview of home care suppliers in the Vienna region.

Badelt, Christoph, Andrea Holzmann-Jenkins, Christian Matul und August Österle. 1997. *Analyse der Auswirkungen des Pflegevorsorgesystems*. [An analysis of the implications of the long-term care system]. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

This report contains data from comprehensive empirical studies on the situation of elderly people who receive care allowance in cash, and of their carers. The study analyses the efficiency of care allowance in cash and the system of care provision in Austria. The authors discuss effects on the use of social services and analyse client satisfaction. They diagnose a high degree of goal achievement through the federal law for care allowances in cash, while highlighting some problematic areas.

Ertl, Regina und Berta Schrems. 1997. *Evaluation von Hauskrankenpflege-Angeboten in Wien. Unter dem Aspekt der Bedürfnis- und Bedarfsorientierung*. [Evaluation in home health care services]. Wien: Dachverband der Wiener Pflege- und Sozialdienste.

Ertl and Schrems describe home care as the original form of care for the sick. After describing the current situation in Vienna and theories of need and care by Olbrecht and Orem, the authors present the methods and results of their evaluation, showing the nominal and actual need for care and nursing. They then discuss deficits in self-help, differences in needs and demand, and aspects of personnel management.

## Health care related social services, convalescence and rehabilitation

Egger, Barbara. 1999. *Gesundheitswesen in Österreich: Gegebenheiten, Tendenzen, Entwicklungen*. [Health care in Austria]. Wien: Volkswirtschaftliche Verlagsgesellschaft m. b. H. (Loseblattsammlung).

Updated twice each year, this report focuses on the institutions of the Austrian health system. It provides an overview of demand types, quantity and qualitative nature (often legally embodied) in residential and non-residential social services.

Heimerl-Wagner, Peter und Christian Köck (eds.) 1996. *Management in Gesundheitsorganisationen: Strategien, Qualität, Wandel*. [Management in health organisations]. Wien: Ueberreuter.

This volume discusses economic views of health organisations, acting as a textbook for management in health organisations. It first presents the basic conditions and foundations of management in health organisations, then concentrates on functional aspects of management (personnel, organisation and marketing). Processes of change in health organisations are described from an organisational viewpoint.

Holzmann, Andrea. 1994. "Between welfare state and civil society: a case study on local community service centres in the Austrian province of Tyrol". Pp. 355-376. In 6, Perri und Isabel Vidal (eds.) *Delivering welfare: repositioning non-profit and co-operative action in western European welfare states*. Barcelona: CIES

Holzmann presents a study of the local health care model in the federal state of Tirol. The author introduces the health system and social services offices in Austria and then discusses over fifty social and health care centres ("Sprenkel") that produce and distribute social services within clients' environment. The special "welfare mix" of this network of institutions in Tirol is described in detail.

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag.

The authors provide an overview of ways of organising social services and elucidate the task ranges of those services. The chapters on "assistance in psychic problems" and "social services in the health sector" discuss psychotherapeutic and psychosocial provision as well as different forms of self-help groups in Austria. The case of drug and alcohol rehabilitation services and care for AIDS-positive people is also presented.

## Disabled

Badelt, Christoph. 1994. "Kosten-Effektivitäts-Analyse zur Wirtschaftlichkeits- und Qualitätskontrolle sozialer Dienste". [Cost-benefit analysis of efficiency and quality control of social services]. Pp. 85-108. In Knappe, Eckhard und Stephan Burger (eds.) *Wirtschaftlichkeit und Qualitätssicherung in sozialen Diensten*. Frankfurt/New York: Campus.

Badelt considers ways of bringing an economic perspective into social work, and presents a cost-efficiency analysis of work with the disabled. The criteria for judging the success of social services may be derived through quite different approaches depending on the economic or social work context. Cost-efficiency analysis is intended to reveal in a transparent way the degree to which the mul-

tidimensional aims of social services are achieved. Badelt uses the “supported employment” model to discuss advantages and disadvantages of the analysis, and concludes by considering the possible effects of such analysis on quality assurance in social services.

Badelt, Christoph und August Österle. 1992. “Supported Employment” – Erfahrungen mit einem österreichischen Modell zur beruflichen und sozialen Integration behinderter Menschen. Pp. 79-150. In Badelt, Christoph (ed.) *Geschützte Arbeit – Alternative Beschäftigungsformen zur beruflichen und sozialen Integration behinderter Menschen*. Wien: Böhlau.

In this chapter the concept of “supported employment” is introduced as an innovative professional approach to integrating disabled people. Badelt and Österle evaluate this model as operationalised by the institute of social services in Vorarlberg. Supported employment in Vorarlberg consists of three parts: holistic and continuous advice and care; advice for enterprises; and provision of labour cost allowances. Through this model the disabled can be employed in the open labour market on a long-term basis; this is especially suitable for those previously employed and cared for in special institutions (i.e. integrative workshops), particularly the mentally disabled. The model increases disabled access to rehabilitation measures and is economically advantageous.

Blumberger, Walter und Christoph Jungwirth. 1996. *Geschützte Werkstätten GesmbH – Unternehmen mit sozialpolitischem Auftrag – Evaluierung der Geschützten Werkstätten nach § 11 BEinstG*. [Sheltered workshops]. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

Sheltered workshops or “integrative workshops” help integrate disabled people into the labour market. These enterprises, with a yearly turnover over one million Schillings, have enormous economic implications. In this research the structure of employment in integrative workshops is described. The authors focus on the level and extent of qualification measures and describe conflicting aims in these institutions as the result of the tension between social work and economic demand.

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag.

The authors provide an overview of ways of organising social services and elucidate the task ranges of those services. The chapter on “Social services for people with disabilities” describes services in the field of early childhood education, schooling and vocational training. Measures for the employment integration of the disabled are presented and ways of improving housing quality and assisting the families of disabled adults are discussed. The authors emphasise fulfilling and representing client interests.

Leichsenring, Kai und Charlotte Strümpel. 1997. "Berufliche Integration behinderter Menschen – Innovative Projektbeispiele aus Europa. Schriftenreihe Soziales Europa". [Integration of disabled people into work and occupations]. Wien: Bundesministerium für Arbeit, Gesundheit und Soziales.

This study presents employment projects that offer innovative approaches in advice, mediation, vocational training and employment of disabled people. Experiences with these projects are described and future developments are suggested. Austria is considered in the chapters on "international projects for supporting transitions from supported employment to the general labour market", and in "Chance B – an association for disabled people in the village of Gleisdorf".

## Homeless, the poor, poverty

Ginner, Sepp. 1997. "Obdachlosigkeit, Schulden und Re-Integration – Sozialarbeit im ländlichen Obdachlosenheim". [Homelessness, debt and reintegration]. Pp. 79-90. In Lange, Josef und Kurt Fellöcker (eds.) *Sozialarbeit im ländlichen Raum: Handlungsfelder, methodische Ansätze und Konzepte*. St. Pölten: SozAktiv.

The author discusses social work conditions in cities and rural areas. He describes working conditions and the cycle of social work with homeless people using the example of a home in the lower Austrian municipality of Winden.

Wallner-Ewald, Stephan. 1999. *Verarmungsrisiken im Wohlfahrtsstaat II: Leben am Rande des Sozialsystems – Die Klientinnen und Klienten der Sozialberatungsstellen der Caritas Österreich*. [Risk of poverty in the welfare state]. Wien: Julius-Raab-Stiftung.

Wallner-Ewald presents research into poverty and social exclusion in Austria. He first clarifies poverty-related terms and presents the current situation in Austria. The Austrian social system is considered under the heading "Poverty policy in Austria". In chapter 3 the social advice centres of Caritas, (called the "third net"), are presented. Chapter 4 analyses the clients of those advice centres. Options for poverty policy are then debated.

## Unemployment

Stelzer-Orthofer, Christine (ed.). 1998. *Strategien gegen Arbeitslosigkeit*. [Strategies against unemployment]. Linz: Johannes Kepler Universität.

In Austria labour market initiatives and a wide spectrum of measures deal with employment. This volume contains many project descriptions and analyses of the advantages and limitations of labour market projects. It presents innovative social services for the unemployed in upper Austrian labour market policy and discusses idea of the labour market as instrument of job creation, its aims, mea-

tures, efficiency and success. It then explores approaches to evaluating labour market policy instruments and projects.

Schmid, Tom. 1997. *Arbeitsmarktpolitische und sozialpolitische Relevanz der sozialökonomischen Betriebe (SÖB) in Tirol*. [Employment and social policy relevance of social enterprises]. Wien/Innsbruck: Tiroler Sozialparlament, Arbeitsmarkt-service Tirol.

In this study Schmid reveals the complex activity of “socio-economic employment enterprises” in Tirol within the context of labour market policy and social policy. He outlines the labour market problem and shows the position of the active labour market in the context of social policy. He then discusses Austrian labour market policy approaches, analysing socio-economic enterprises as instruments for integrating the long-term unemployed. Enterprises in Tirol are presented in terms of their task range, financing, personnel and concepts of care. Schmid then discusses policy recommendations.

## Immigrants and refugees

Klicpera, Christian und Barbara Gasteiger-Klicpera. 1997. *Soziale Dienste: Anforderungen, Organisationsformen, Perspektiven*. [Social services: challenges, organisational forms, options]. 3. Auflage. Wien: WUV-Universitätsverlag.

The authors provide an overview of ways of organising social services for immigrants in the chapter on “measures for integrating immigrants”. They address housing, vocational training and employment problems, and describe problems and difficulties immigrants face in using social care and integration measures.

## D. Summary assessment of current debates in the field

Austria has seen continuous increase in the use of social services and expansion in the number of social services, both of which seem likely to continue in the future. In particular, the demand structure shows a trend toward increasing use of decentralised residential services (for example day care centres) while the importance of using traditional institutions declines.

Due to the “unmarketability” of most social services, a division of labour between public institutions and the non-profit sector has emerged while profit oriented enterprises are still rarely represented. Empirical studies repeatedly point toward the complex nature of the institutional mix between public and private sectors (Badelt, 1999: 82), an issue which is strongly debated in Austria.

Recently analysts have observed increasing professionalisation in social services. In this line, one innovative route that has been taken is the expansion of local services (mobile advice centres for children and teenagers and for technical advice on using the database HANDYNET, etc.) and in the integration of new media technology. These developments entail market orientation and competition, efficiency and accountability. Quality assurance and improvement are amongst the most discussed topics, with organisations increasingly developing qualitative standards such as ISO. This in turn increases competition between grassroots small services and big organisations, while social services tend to network and coordinate on different levels.

Another important topic of discussion are the implications of increasing globalisation and Austria's EU membership, which have been felt for example in Austria's use of the European Social Fund for its social service projects, particularly to reduce long-term unemployment.

## Belgium<sup>1</sup>

by *Arend Van Leeuwen, Ninke Mussche and Ive Marx*

Centre for Social Policy, University of Antwerp (UFSIA)

### A. Synopsis of the Social Service System

Social services are defined as the whole range of services, in cash or in kind, which help maintain a certain level of well-being or standard of living. As such, the term 'social services' covers programmes of income maintenance, family care, youth support, care for the disabled and the elderly, and integration programmes for minorities.

Social services are provided on three levels. Cash transfers for poverty alleviation and income maintenance are mainly provided through governmental and non-governmental institutions which operate at the federal level and are governed by federal law. The Federal Law on the Subsistence Minimum entitles every citizen to a minimum income, subject to a work requirement for the non-elderly. Personal services like care for the elderly, the disabled, children and other groups are mainly organised at the regional level and governed by regional law. A network of government funded community-based public welfare centres provides social services and financial assistance to citizens whose well-being threatened. Social services are also provided by a multitude of non-governmental but usually publicly funded nonprofit organisations.

*Indicators of social services provision, 30 June 1998*

<b>Health and social services</b>	
<i>Number of institutions</i>	<i>Total number of people employed</i>
14,280	360,372
<i>Output in million BEF</i>	<i>Added value in million BEF GDP</i>
782,697	516,966

Source: National Statistical Office

<sup>1</sup> This bibliography focusses on the Flemish part of Belgium only.

## B. Annotated Bibliography

Breda, Jef and Deleeck, Herman, 1996. *Welzijnszorgplanning; Een kwantitatieve benadering; Onderzoek in opdracht van de Vlaamse minister van Gezin en Welzijn*. [Welfare planing]. Ministerie van de Vlaamse Gemeenschap.

This publication discusses developments in different areas of the social services sector in the Flanders Region. The book consists of two parts. The first discusses the expected demand for social services among various target groups: the disabled, the elderly, children and the underprivileged. The second provides expenditure projections for various sectors of social welfare provision: care for the disabled, child care and care for the elderly. The book provides a good overview of the momentous changes in the social services sector during the 1980s and 1990s and also of expected changes to come.

Lammertyn, F. 1990. *De welzijnszorg in de Vlaamse Gemeenschap. Voorzieningen en overheidsbeleid*. [Welfare planing]. Leuven: Kluwer Editorial.

Lammertyn provides an overview of the state of social services around 1990 and of developments in preceding years, with particular focus on principal developments after the Flemish Community (i.e. the regional government) became responsible for social welfare provision. The book provides an overview of the social services sector (organisation, personnel, nature and quality of services) and discusses relevant publications in each of area.

Lammertyn, F. and Van Bavel, J. 1996. *Het decor van de zorg. Sociale veranderingen en welzijn in Vlaanderen*. [Social change and social welfare in Flanders]. Leuven/Amersfoort: Acco.

This practical handbook for social workers in the field also offers a good overview of the social services sector in the Flanders Region. It discusses the current praxis of social welfare work against the background of social change and links the micro-level (day-to-day activities of social workers) with the macro-level (the social, economic and cultural environment).

Stimulans 1999. *Welzijnsonderzoek in Vlaanderen 1998–1999*. [Welfare in Flanders]. Ministerie van de Vlaamse Gemeenschap.

This government publication, in its third edition, gives an overview of social welfare research funded by the Flemish Community. It covers the following areas: general welfare, family care, youth care, home care, care for the disabled and anti-poverty policy. It also provides abstracts of research in 1997 and looks ahead to research in 2000.

Zelfhulp gids 2000. *Wegwijzer naar zelfhulpgroepen en zelfhulporganisaties in Vlaanderen 2000–2001*, Lannoo. [Guide to self-help groups in Flanders, 2000–2001].

This guide provides an up-to-date listing and description of self-help organisations in Flanders.

Breda, J., Goyaerts, K. and Crets, S. 1996. *Samenhang en Coördinatie in de Ambulante Sociale Welzijnszorg*. [Organisation and co-ordination of welfare services]. Onderzoek in opdracht van het ministerie van Welzijn en Gezin. UFSIA: University of Antwerp.

This research report, commissioned by the Flemish Minister of Well-being and Family Affairs, assesses social services provision in Flanders. It assesses the efficacy of co-ordination mechanisms between organisations and analyses whether supply adequately meets demand.

Breda, J., Crets, S., Raemdonck. 1994. *Werken in de Zorg. Resultaten van een exploratieve studie naar tijdsbesteding en arbeidsbelasting in de sociale dienstverlening*. [Social work and work conditions]. Unpublished paper, UFSIA, Antwerp.

This research looks at the time use and work load of social workers.

Geerts, Fons. 1998. "Schaalvergroting . . . en kwaliteit". *Tijdschrift voor Welzijnswerk*, Volume 22, februari (pp. 16-24). Ludo de Cort, Brussel.

This article reviews the impact of organisational reforms to enhance the efficiency of care delivery, compared to similar developments in the higher education system in Flanders.

Breda, Jef. "Vrijwilligerswerk in de huidige samenleving". [Voluntary work and modern society]. *Tijdschrift voor Welzijnswerkswerk*, Volume 21, april/mei 1997 (pp. 6-16). Ludo de Cort, Brussel.

This article discusses the place of voluntary work within modern society. It provides a literature review and discusses research commissioned by the King Boudewijn Trust.

Hedebouw, Georges; Debrabander, Kristien; Van Dender, Kurt; Pacelot, Jozef. 1991. *Vrijwillige zorgverlening en verenigingswerk: een Europees en Vlaams perspectief*. [Voluntary work in Flanders and Europe]. Leuven: Hoger Instituut voor de Arbeid, K.U. Leuven.

This study focuses on developments in voluntary work in Flanders and Europe. Although the publication is not very recent, it provides a good overview of trends and developments. It links developments with the government position toward voluntary work in the social welfare sector.

Van Der Sype, Kris. "Gezocht: een vriend (m/v) . . . Of, hoe rehabiliteren niet enkel een kwestie van deskundigheid is! Drie maanden metawonen". [Social work and integration of disabled]. *Tijdschrift voor Welzijnswerk*, Volume 21, juli 1997 (pp. 5-10). Ludo de Cort, Brussel.

Van Der Sype reviews a project that aimed to integrate institutionalised psychiatric patients into society. The author concludes that involvement of both professional workers and volunteers is necessary for successful reintegration.

Opdebeeck, Sybille; Rommel, Frans; Lammertijn, Frans “Het spanningsveld tussen professionelen en vrijwilligers. Enkele bevindingen uit een empirische studie”. [Tensions between voluntary and paid staff]. *Tijdschrift voor Welzijnswerk*, Volume 22, maart 1998 (pp. 15-26). Ludo de Cort, Brussel.

This article discusses empirical evidence on the relationship between professional social workers and voluntary workers, and highlights various aspects of this relationship.

Special edition on Quality issues in the welfare sector. “Kwaliteitszorg: verrijking of verijking in de welzijnssector?” [Quality control in welfare sector]. *Tijdschrift voor Welzijnswerk*, Volume 21, september/october 1997. Ludo de Cort, Brussel.

This special issue contains articles about quality issues in the social service sector, including articles on ‘Total quality in social services’ by Vanden Bussche, Annemie; ‘Customer focus in Home care’, by Hedeboom, Georges; and ‘Quality in child care’, by De Vos, Christine and Vanden Broucke, Jeannine.

Knorth, E.J. and Smit, M. (ed). 1999. *Planmatig handelen in de Jeugdhulpverlening*. [Social services for youths]. Leuven – Apeldoorn: Garant.

This book discusses social services for youngsters in the Netherlands and Flanders, Belgium. It focuses on new developments and the efficiency and effectiveness of the sector in a changing environment. It contains contributions from leading academics and covers topics such as planned treatment of youngsters; diagnosis and decision making; planning and implementing tasks.

Breda, Jef; Stefan, Crets; Raemdonck, Iris. 1995. *Werken in de hulpverlening. Tijdsbesteding en arbeidsbelasting van maatschappelijk werkers*. [Social work conditions]. Leuven/Amersfoort: Acco.

This book draws on empirical evidence to discuss time use and work load of social workers.

Vandenbroele, Henk and Kerremans, Sandra. “Gemeentelijke intake-formulier thuiszorg. Naar een middel voor een betere afstemming van vraag en aanbod”. [Co-ordinated in-take procedures for social services provision]. *Tijdschrift voor Welzijnswerk*, Volume 21, Juli 1997 (pp. 14-30). Ludo de Cort, Brussel.

This article discusses a new way of developing co-ordination between institutions. It discusses a new intake-procedure that aims to achieve a better match between demand (needs) and supply (social services provided).

Huys, Jos. “Voorstel van decreet tot invoering van de persoonlijke assistentie. Standpunt”. [Personal assistance financing]. *Tijdschrift voor Welzijnswerk*, Volume 20, november 1996 (pp. 28-32). Ludo de Cort, Brussel.

In this article Huys reflects on proposals by the Flemish government to finance a personal assistant for disabled people.

Nijkamp, Peter; Pacelot, Jozef; Spinnewyn, Hilde; Vollerling, Ans; Wilderom, Celeste; Winters, Sien. 1991. *‘Proceedings of a seminar on National Diversity and European Trends in Services for the Elderly’*. Amsterdam / Leuven: Higher Institute for Labour Studies, KU Leuven and Faculty of Economics and Econometrics, Vrije Universiteit Amsterdam.

This book provides an overview of conditions in the field of elderly care in Europe in 1991.

Van Gestel, Dirk. “De noodzaak aan een organisatorische omkadering. Een praktijkmodel”. [A practical model of professional and volunteer organisation]. *Tijdschrift voor Welzijnswerk*, Volume 22, maart 1998 (pp. 43-51). Ludo de Cort, Brussel.

This article suggests an institutional framework for organising professionals and volunteers.

Wels, Geert and Opdebeeck, Sybille. “Op weg naar nieuwe vrijwilligheid”. [On the way to a new voluntarism]. *Tijdschrift voor Welzijnswerk*, Volume 24, maart 2000 (pp. 15-20). Ludo de Cort, Brussel.

This article discusses a new way of using volunteers. It focuses on issues of organisation and management.

Opdebeeck, Sybille; Vandenberk, Anneleen and Lammertijn, Frans. “De zorgverzekering in Vlaanderen: Visie van de bevolking”. [Social care insurance in Flanders]. *Tijdschrift voor Welzijnswerk*, Volume 24, januari 2000 (pp. 5-17). Ludo de Cort, Brussel.

This article focuses on future developments in the field of social care insurance. Evidence is presented from opinion research among the Flanders population. It addresses questions such as who ought to be responsible, who ought to get what, and how much.

Breda, Jef and Schoenmaekers, David. “De persoonlijk assistent in dienst van personen met een handicap”. [Personal social assistance and the disabled]. *Tijdschrift voor Welzijnswerk*, Volume 24, januari 2000 (pp. 31-47). Ludo de Cort, Brussel.

This article discusses the findings of experimental projects involving the provision of a personal assistant to disabled people.

Schepers, Jo P.A. 1999. *Sociaal hulpverleningsrecht in de praktijk. De organisatie van de sociale hulpverlening. Deel 1&2*. [Social welfare legislation in practice: volumes one and two]. Brugge: Die Keure.

These two books present detailed descriptions of social welfare legislation in the Flemish community.

## C. Special Fields

### Child and Youth Welfare

Deven, F., Lambrechts, E., Malfait, D., Van den Bergh, B., Van Dongen, W., Wyns, M., “Kinderopvang in Vlaanderen: onderzoek en beleid”. [Child care services in Flanders]. CBGS Projectgroep Kinderopvang CBGS Document, 1996, 4.

The authors provide an overview of policies and research on child care.

Breda, J. and Verlinden, Elke. 2000. *Tijdsbesteding en werkbelasting bij de comités voor bijzondere jeugdbijstand en de sociale diensten van de jeugdrechtsbanken in de Vlaamse Gemeenschap*. [Time use and work load of committee members in youth welfare organisations]. Vakgroep Sociologie, UFSIA, University of Antwerp. This research looks at the time use and work load of people employed by committees for youth support and by social services departments of the juvenile courts.

Hermans, Greetje and Lauwers, Jan. “De zorg voor geplaatste jongeren: Tussen controle en binding”. [Caring for youngsters in foster care: Monitoring versus bonding]. *Tijdschrift voor Welzijnswerk*, Volume 23, juni 1999 (pp. 27-40). Ludo de Cort, Brussel.

This article draws on thirty-seven interviews with professionals working in institutions for youngsters with problems. It is written from the point of view of parents talking with youngsters, providing interesting and lively insights.

## Family Services

Gielis, André. 1998. “Zorgwekkende gezinnen – zorgwekkende samenleving. Hulpverlening tussen autonomie en integratie”. [Worrying families – worrying society. Service provision between autonomy and integration]. *Tijdschrift voor Welzijnswerk*, Volume 22, juni 1998 (pp. 5-10). Ludo de Cort, Brussel.

Gielis discusses the conditions under which a family ought to receive help, what kind of help ought to be provided, and the problem of dealing with a diversity of needs.

Driessens, Kristel; Smekens, Elke. "Een botsing van waardenpatronen. Hulpverlening aan arme gezinnen". 1997. [Competing value patterns: Service provision to poor families]. *Tijdschrift voor Welzijnswerk*, Volume 21, februari 1997 (pp. 15-26). Ludo de Cort, Brussel.

Drawing on a wide variety of data this article discusses what is different and difficult about the social services provision for poor families. The author argues that one important problem is that such families often do not believe in their own ability to improve their situation.

Van Crombrugge, Hans. "Het ge(dis)kwalificeerde gezin. Over noodzaak van een ethiek van het goede gezinsleven". [The dysfunctional family. On the need for an ethics of family life]. *Tijdschrift voor Welzijnswerk*, Volume 22, juni 1998 (pp. 20-37). Ludo de Cort, Brussel.

This article considers various ideas of what constitutes a "balanced family". It thus provides a more theoretical than practical approach to family problems.

Bode, Agnes and Lanoye, Hilde. "Een mantelzorgvriendelijke bijdrage en kortingen voor zwaar zorgbehoevenden in de gezinszorg". [Contributions and discounts for people with severe disabilities in family care]. *Tijdschrift voor Welzijnswerk*, Volume 23, juni 1999 (pp. 5-13). Ludo de Cort, Brussel.

Bode and Lanoye examine new policies which increase funding in family care for people with severe disabilities. It discusses the different policy elements and their financial consequences. It also discusses the possibility of insurance coverage for the disabled.

## **Frail elderly, nursing homes, long-term care.**

Breda, J., Crets, S. and Van Pellicom, A. 1996. *Zorg aan chronisch-behoeftege bejaarden: actuele situatie, kosten en trends*. [Care of frail elderly]. Federal Ministry of Science, Programme of Public Economics: Brussel.

This article is based on research comparing chronically ill and healthy elderly people. Particular attention is given to medical and non-medical expenses. The article also contains expenditure trends and projections for the period 1992-2002.

Heeren, Jos and Thewys, Theo. 1999. *Seniorenvoorzieningen voor en na 2000*. [Care services for senior citizens in 2000]. Kluwer Editorial, Diegem.

This handbook describes the history and current situation of care services for senior citizens and the elderly, providing data on developments and problems of supply.

Lammertyn, F. and Van Audenhove, Ch. 1995. *De zorg voor dementerende ouderen in Vlaanderen*. [Care services for elderly with dementia]. Realisaties, knelpunten en voorstellen. Leuven/Amersfoort: Acco.

This publication provides an overview of services for Alzheimer patients and their families in Flanders. It discusses various home care arrangements and the impact of the living environment on patients.

Pacolet, Jozef; Lanoye, Hilde; Van Dender, Kurt; Spinnewyn Hilde. 1994. *De financiering van de bejaardenzorg: Nood aan een afhankelijkheidsverzekering?* [The financing of services for the elderly]. Leuven: Hoger Instituut voor de Arbeid, KU Leuven.

This study reviews care facilities for the elderly, focusing in particular focus on how these facilities are financed. It also discusses the need for collective care insurance.

Vlaams Welzijnscongres. 1993. "Ouderen in solidariteit". [The elderly and solidarity]. *Congreswerkboek*. Zaventem: Kluwer Editoria.

This reader contains a wide range of papers by leading researchers on issues related to the elderly. The book was compiled from papers presented at a congress on care for the elderly organised by the Flemish government.

Cuyvers, Guido. "Zorg op maat in de bejaardenzorg". [Individualised care for the elderly]. *Tijdschrift voor Welzijnswerk*, Volume 21, november 1997 (pp. 39-53). Ludo de Cort, Brussel.

This article describes research looking at differential need among different categories of elderly people, paying special attention to housing needs.

## **Health care related social services, convalescence and rehabilitation**

Van Der Sype, Kris. "Gezocht: een vriend (m/v) . . . Of, hoe rehabiliteren niet enkel een kwestie van deskundigheid is! Drie maanden metawonen". [The need for volunteers and professionals in the rehabilitation of psychiatric patients]. *Tijdschrift voor Welzijnswerk*, Volume, Jaargang 21, juli 1997 (pp. 5-10). Ludo de Cort, Brussel.

This article reviews a project to integrate institutionalised psychiatric patients back into society. The article stresses the need for the involvement for both voluntary workers and professional social workers to participate in the reintegration process.

## Disabled

Huys, Jos. “Voorstel van decreet tot invoering van de persoonlijke assistentie. Standpunt”. [Involving the personal social service carer]. *Tijdschrift voor Welzijnswerk*, Volume 20, November 1996 (pp. 28-32). Ludo de Cort, Brussel. This article reflects on proposals by the Flemish government to finance personal assistants for disabled people.

Breda, Jef and Schoenmaekers, David. “De persoonlijk assistent in dienst van personen met een handicap”. [The personal carer and the disabled]. *Tijdschrift voor Welzijnswerk*, Volume 24, januari 2000 (pp. 31-47). Ludo de Cort, Brussel. This article discusses the findings of experimental projects involving the provision of personal assistants to disabled people.

Durnez, Marleen. “Het beleidsplan van het Vlaams Fonds voor Sociale Integratie van personen met een handicap”. [Policy for integrating disabled people]. *Tijdschrift voor Welzijnswerk*, Volume 22, september 1998 (pp. 5-12). Ludo de Cort, Brussel.

In this article the author, president of the Flemish fund for the social integration of disabled people, explains the main targets of the new policy plan and discusses further policy ideas for integrating the disabled into society.

Bode, Agnes and Lanoye, Hilde. “Een mantelzorgvriendelijke bijdrage en kortingen voor zwaar zorgbehoevenden in de gezinszorg”. [Contributions and discounts for severely handicapped persons in family care]. *Tijdschrift voor Welzijnswerk*, Volume 23, juni 1999 (pp. 5-13). Ludo de Cort, Brussel.

This article examines new policies to increase funding on social welfare for people with severe disabilities. It discusses the different policy elements and their financial consequences. It also discusses the possibility of insurance coverage for the disabled.

## Homeless, the poor, poverty

Luyten, Dirk. 1993. *OCMW en Armenzorg. Een sociologische studie van de sociale grenzen van het recht op bijstand*. [A sociological study of social boundaries of the right to income support]. Leuven: S.O.I. Departement Sociologie K.U. Leuven. This book contains a sociological and ethical analysis of social assistance provision in Belgium.

Vranken, Jan, Geldof, Dirk and Gerard Van Menxel. Various years. *Armoede en sociale uitsluiting: Jaarboek*. [Poverty and social exclusion]. Leuven: Acco.

This yearly publication contains data and analysis of poverty and social assistance trends in the Flanders area. The yearbook lists and discusses policy changes and summarises findings from relevant research.

Cantillon, Bea. 1999, *De welvaartsstaat in de kering*. [The welfare state at the crossroads]. Uitgeverij Pelckmans, Kapellen.

Cantillon looks at how the Belgian welfare state has fared over the past twenty-five years, focusing in particular on how the welfare state has balanced increasing vulnerability as a consequence of economic and socio-demographic change.

## Unemployment

Steunpunt Werkgelegenheid, Arbeid en Vorming. Various years. *Jaarboek van de arbeidsmarkt in Vlaanderen*. [Flanders Labour Market Yearbook].

This yearly publication provides extensive data and analysis of labour market trends in the Flanders area. The yearbook also reviews policy changes and summarises findings from labour market research.

## Immigrants and Refugees

Lamote, Johan. “Een multicultureel opvoedingsproject ‘De Mozaïk’”. [A Multicultural education project]. *Tijdschrift voor Welzijnswerk*, Volume 21, Juli 1997 (pp. 18-23). Ludo de Cort, Brussel.

This article is written by the director of a primary school that promotes the integration of different cultures in society. He describes how the school developed an educational programme focused on this issue, describing the history of the project, the reasons behind it and its current state.

## D. Summary assessment of current debates in the field

Four topics in current debates on social services in Belgium are particularly prominent. First, there is substantial discussion of how the quality of social services could be improved. For example there is now widespread agreement that service provision and organisation should become client-centred, however such an approach raises questions concerning how to introduce greater flexibility in service delivery. Another suggestion for quality improvement is the potential introduction of personal client budgets, the advantages and disadvantages of which are currently under discussion. Finally, the development of appropriate measures to ensure the quality of services is also under discussion, particularly since government announced plans to introduce quality standards.

Second, there has been substantial attention to the issue of how to improve staff recruitment and retention in social services. As a consequence, the collective labour agreement in the social sector has been changed and the unequal treatment of medical and non-medical staff was abolished.

Third, currently under consideration are ways of ensuring sufficient financial resources to ensure what have become legal rights to social services and adequate social care in times of need, particularly in old age. Opinions are divided on whether this right ought to be financed through general taxation or through compulsory social insurance.

Fourth, policy makers have observed that the social services sector is too decentralised, with too many smaller providers. This raises questions about how to improve co-ordination among service providers and what the optimal size of social services organisations should be.

## Denmark

by Inger Koch-Nielsen & Jakob Dalsgaard Clausen

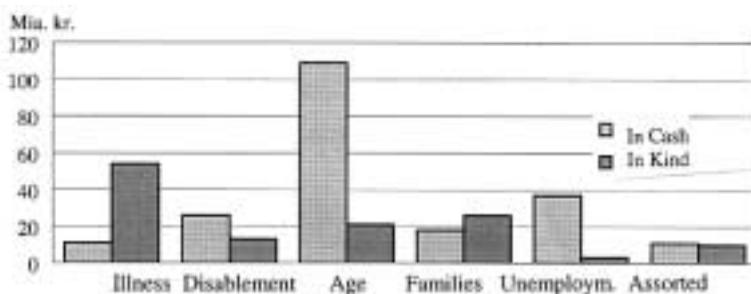
Danish National Institute of Social Research (SFI)

### A. Synopsis of the Social Service System: organisation and financing of public social services

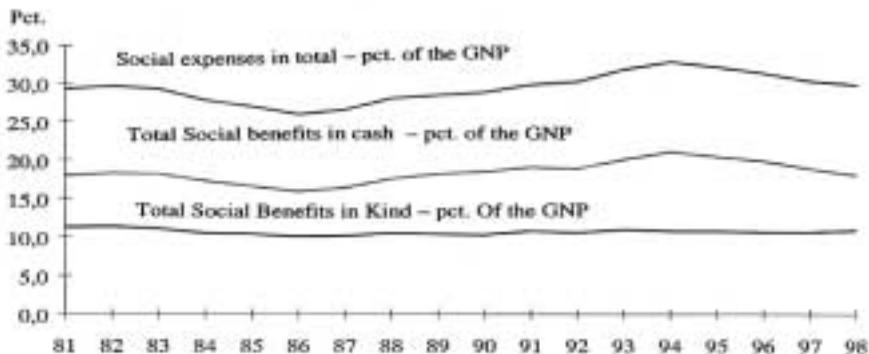
The Danish welfare model is characterised by the dominant role of the public sector and by the fact that social services are mainly financed through taxation. Social services are an important element in the Danish welfare model, characterised by their widespread availability, for the most part free of charge or otherwise heavily subsidised.

Public administration in Denmark is divided into a three-tier structure: state, regional and local governments. There are 14 regional and 275 local authorities. Most regional and local government responsibilities are laid down by law. The health sector is primarily the responsibility of regional authorities, but with some overlap with local authorities. For the most part social services are decentralised and under the responsibility of local government, which finances one-third of the costs and by law must make the requisite care services available to local residents. However, local authorities have flexibility in determining the level and provision of services, and to a lesser extent their financing. To a limited extent certain services may be financed through user payments. Taxes are also levied locally. Municipal income taxes constitute two-thirds of all income taxes, and revenues are supplemented by block subsidies from the state, divided among local authorities according to criteria agreed upon at both state and municipal levels. Additionally, local authorities may apply for a number of state funding schemes available for special purposes. The following figures show social service expenditures in Denmark by type and field.

*Social expenditures in kind and cash 1998*



*Social expenditures as percentage of the GNP 1981-1998*



## B. Annotated Bibliography

### 1. Comprehensive works, overview volumes, classics on social services and the welfare system

Plovsing, Jan. 1990. *Socialpolitik i velfærdsstaten*. [The social policy of the Welfare State]. Copenhagen: Handelshøjskolens Forlag & Nyt Nordisk Forlag Arnold Busck.

In the first part of this book Plovsing describes the Danish welfare state and social policy generally, comparing Danish measures on this subject with those of other countries and discusses current trends and developments. The author additionally reviews the development of social policy and the standard of living in Denmark over the last thirty years. In the second part Plovsing focuses on the various cash and service welfare benefits available in Denmark. The book closes with a discussion of how tasks and financing are divided among the different government levels.

Andersen, Bent Rold. 1971. *Grundprincipper i socialpolitikken*. [The fundamental principles of social policy]. Albertslund: Nyt Socialt Bibliotek Det Danske Forlag In the introduction to this book Andersen the basic elements of social policy theories. In four main chapters the author goes through what he describes as the “selection-mechanism” – processes set out in social legislation regarding entitlement and assessment in relation to social benefits. In the closing chapter the he delineates and discusses the main problems of modern social policy.

Dich, Jørgen S. 1967. *Kompendium i Socialpolitikens Historie I – Udviklingen indtil 2.* [The history of social policy development up to World War II]. Verdenskrig. Odense: Odense Universitetsbibliotek.

This compendium on the history of Danish social policy was originally intended as teaching material for students. The report contains factual information and political opinion about Danish social policy, thus setting the scene for a discussion of these subjects.

Steincke, K.K. 1920. *Fremtidens Forsørgelsesvæsen – bind I & II.* [The future of social security – vol. I & II]. Copenhagen: J.H. Schultz A/S.

This classic study by Steincke reviews and critiques Denmark's social security legislation. In addition to this very thorough analysis the author presents a number of proposals for a systematic reorganisation of Danish social security legislation, under the Social Democratic government with Steincke as Minister of Justice.

## 2. Supply and demand of social services

(a) Studies for Social Reform, Part One, Volumes I–IV:

Ussing, Jytte. 1970. *Socialreformundersøgelserne – Bd. I – metoder og materiale.* Copenhagen: Socialforskningsinstituttet.

Andersen, Bent Rold. 1970. *Socialreformundersøgelserne – Bd. II – Borgeren og trykkesystemet.* Copenhagen: Teknisk Forlag & Socialforskningsinstituttet.

Westergård, Kaj. 1971. *Socialreformundersøgelserne – Bd. III – de sociale ydelser.* Copenhagen: Socialforskningsinstituttet.

From, Anders. 1972. *Socialreformundersøgelserne – Bd IV – social sårbarhed og modstandsdygtighed.* Copenhagen: Socialforskningsinstituttet.

In 1965 the Danish Social Reform Commission requested a series of surveys be carried out by the Danish National Institute of Social Research, for use in the Commission's work. In the first part of the series a survey was conducted on how and to what degree social services handled cases of hardship occurring during the period studied. The second part of the series explores the effectiveness of the social service apparatus and its lines of co-operation. This exploration includes a description of conditions under which people experienced loss of income due to sickness, unemployment or other social problems during a given time-period. The total project is referred to as the Social Reform Study-Project. The publication of its four reports led to social reform closely following the project suggestions.

(b) Studies for Social Reform, Part Two, Volumes I–VII:

Fridberg, Torben; Gundelach, Lone; Maltesen, Ib and Plovsing, Jan. 1982. *Socialreformundersøgelserne. 1. klagerne og det sociale ankesystem*. Copenhagen: Teknisk Forlag & Socialforskningsinstituttet.

Plovsing, Jan; Pruzan, Vita; and Majlund, Jens-Erik (Eds.). 1983. *Socialreformundersøgelserne. 2. Sociale netværk og holdninger til sociale ydelser*. Copenhagen: Socialforskningsinstituttet.

Fridberg, Torben. (Ed.). 1983. *Socialreformundersøgelserne. 3. Det sociale ankesystem og kommunerne*. Copenhagen: Socialforskningsinstituttet.

Plovsing, Jan (Ed.). 1983. *Socialreformundersøgelserne. 4. Socialforvaltningens situation*. Copenhagen: Socialforskningsinstituttet

Pruzan, Vita; Majlund, Jens-Erik and Spohr, Jan (Eds.). 1984. *Socialreformundersøgelserne. 5. sociale problemer 1966-1982*. Copenhagen:

Jørgensen, Winnie and Thaulow, Ivan (Eds.). 1984. *Socialreformundersøgelserne. 6. klienternes levekår og problemer*. Copenhagen: Socialforskningsinstituttet.

Rørbech, Mette (Ed.). 1985. *Socialreformundersøgelserne. 7. Hvordan går det klienterne?* Copenhagen: Socialforskningsinstituttet.

After the implementation of the Danish social reform in the 1970s, the Ministry of Social Affairs requested that the Danish National Institute of Social Research explore the effects of the social reform. The *new studies for social reform*, headed by Jan Plovsing, describe and analyse both the effects of the new legislation and the general function of the new public social system. The studies focus primarily on the implementation process, evaluated according to the social reform objectives of rehabilitation, safety, well-being and legal protection. Additionally the reports evaluate the consequences for citizens/clients.

### 3. Definition, forms and types of social services

Bengtsson, Steen. 1999. *Social Service til alle*. [Social services to all citizens]. Copenhagen: Socialforskningsinstituttet.

This book is based on a study of the organisation of social services administration over thirty years in two Northern Italian and two Southern Scandinavian cities. The objective of the first great Danish social reform in the 1930s was to limit poverty through provision on a non-discretionary basis, while the objective of social reform in the 1970s was to integrate citizens through active out-reach case-

work. Bengtsson points out that the latter became the embodiment of service content and indeed determined service content more than did the professionalism of social workers. Bengtsson emphasises that there is a great distance between the earlier Weberian style bureaucracy of social administration, and a style that can actually integrate citizens; therefore the development of a new style in local communities will run into serious conflicts. However, it is the author's opinion that the foundations for new social services organisation are moulded in these conflicts.

#### **4. Organisational aspects, forms, ownership, and auspices of provider**

Fridberg, Torben (Ed.). 1997. *Hvem løser opgaverne i fremtidens velfærdssamfund?* [The future of welfare state responsibilities]. Copenhagen: Socialforskningsinstituttet.

This anthology concentrates on addressing future tasks and issues facing the Danish Welfare State, particularly the question of who will provide social services. The incessant discussion of the Danish welfare state model has raised considerations of whether it is advisable or possible to change the 'welfare-mix' through an alternative distribution of responsibilities among public authorities, the market and civil society (including the family). This debate began ten to fifteen years ago as a general discussion of privatisation, but currently its main themes are: contracting out social services; the social responsibility of enterprises; the priority of voluntary welfare work; the priority of the family, especially families with children; and emphasising individual responsibility and self-care. The various articles in the anthology discuss the direct and indirect consequences of possible models.

#### **5. Financing**

Danish discussion on this field is to a great extent dominated by the Ministry of Finance, the National Association of Local Authorities in Denmark and other public governmental agencies, and are accordingly published in governmental reports. Therefore there are very few impartial scientific contributions on the subject of social service financing in Denmark.

#### **6. Staff and volunteers**

Anker, Jørgen. 1995. *De frivillige sociale organisationer*. [Voluntary Social Organisations]. Copenhagen: Socialforskningsinstituttet.

Anker aims to quantitatively describe the functions and resources of voluntary

social service organisations, or nonprofit organisations, their co-operation with the public sector and expectations regarding their socio-political role. Anker shows how, rather than existing in a world by themselves, voluntary organisations are woven into a large number of relations with the public sector. They thus become partners with the public sector in tackling social problems, while at the same time acting as interest groups seeking influence and trying to raise public awareness of specific socio-political issues.

Anker, Jørgen and Koch-Nielsen, Inger. 1995. *Det frivillige arbejde*. [Voluntary Work]. Copenhagen: Socialforskningsinstituttet.

Anker and Nielsen's book on voluntary work is drawn on a Danish survey that was part of the international EUROVOL-project. The book covers all types of voluntary work and is therefore not confined to voluntary social work. Voluntary work is considered voluntary, unpaid activity performed for the benefit of others rather than for oneself or one's family. The research is based on a theory of the influence of social arenas on involvement in voluntary work. The theory, originally developed from a study of voluntary work in Sweden in 1993 (Jeppsson Grassman, E., (1993) *Frivilliga insatser i Sverige*. Stockholm: Socialdepartementet: Statens offentliga utredningar), focuses on the correlation between level of social activities and likelihood of becoming involved in voluntary work. Anker and Nielsen conclude that the more social interactions an individual is involved in, the more likely that individual will be exposed to voluntary work. However, they emphasise the significance of the broad distribution of voluntary work in Danish society.

Gruber, Thomas and Villadsen, Kaspar. 1997. *Kvalitet i det frivillige sociale arbejde*. [Quality in the voluntary work]. Copenhagen: Socialforskningsinstituttet.

At the request of the Committee on Voluntary Social Work, the Danish National Institute of Social Research (SFI) carried out a number of group interviews with leaders and voluntary workers in four of the largest voluntary organisations in Denmark in the spring of 1996. This book discusses the quality of the person-to-person contact and possible methods of measuring this quality of work, centring its discussion around two types of voluntary work: visiting services in the Danish Red Cross and the Federation of Paris Charities, and Welfare Cafés/Shelters in KFUM's Welfare Work and the Church Army.

Rasmussen, Elisabeth Toft and Koch-Nielsen, Inger (Eds.). 1996. *Den tredje sektor under forandring*. [The Third Sector in Transformation]. Copenhagen: Socialforskningsinstituttet.

This anthology includes contributions from seven Scandinavian researchers who have studied the third sector, voluntary organisations and voluntary work for several years. A central issue debated in this book is how general changes in society influence the third sector. The researchers discuss the direction of developments in voluntary organisations and voluntary work, and the underlying reasons for

these developments. Another central issue is the relation between voluntary organisations and the public sector as partners rather than opponents. An historical perspective is taken to assess the scope of co-operation between the third sector and the public sector, and the consequences of this co-operation.

Christensen, Søren and Molin, Jan (Eds.). 1995. *I den gode sags tjeneste – frivillige organisationer i Danmark*. [Working for the good case – voluntary organisations in Denmark]. Copenhagen: Handelshøjskolens Forlag.

This anthology presents the contributions of representatives of voluntary organisations as well as researchers and consultants in the field. Contributors discuss conditions for participation in voluntary organisations in Denmark, in which expectations and critical questions about voluntary work increase.

## 7. Clients, users, and consumer issues, profiles

Bengtsson, Steen. 1997. *Kvalitet gennem brugerindflydelse – et forsøg med styring af indhold i stedet for form*. [Quality through User Influence]. Copenhagen: Socialforskningsinstituttet

This publication evaluates a quality-program concerned with the effects which increased user-influence have on the design of social services. It covers social service design experimentation in eighteen Danish municipalities and in four different social service fields – elderly care, rehabilitation, substance abuse and family problems. Bengtsson establishes that “the users” have a meaningful say; and when clients have the right or the power to influence actions or decisions related to social services they can enlighten social service staff in many ways. Constructive forums for clients to express their attitudes, feelings and emotions about social services are particularly important for their relationships with social service authorities.

Krogstrup, Hanne Kathrine. 1997. *Brugerinddragelse og Organisatorisk Læring i Den Sociale*. [User-involvement and learning processes in the social sector]. Århus: Forlaget System A/S.

Krogstrup discusses various social problems and difficulties associated with quality assessment of social services. He discusses in particular the insufficiency of management-orientated methods. The author further emphasises a user-concept within the social sector and theories of organisational learning. Krogstrup finds that a common request among social service users is for more open dialogue within social service systems.

Ugerhøj, Lars. 1995. *Hjælp eller afhængig*. [Support or Dependence]. Aalborg: Aalborg Universitetsforlag.

Ugerhøj performs a qualitative study of communication and collaboration between families at risk and social workers in agency settings in Denmark. The

study has three stages. The first comprises depth-interviews with forty-four families at risk, social workers, family service executives and politicians connected to agencies in two minor municipalities. The second and third stages involve testing findings and re-interviewing twelve families, social workers, executives and supervisors. Ugerhøj's findings emphasise that changing collaboration and communication between families and social workers involves families, professionals and the agency traditions. Only continuous feedback, reflection, dialogue and evaluation involving all parties will make it possible to: 1) follow changing needs; 2) know what clients understand; and 3) work on engagement, human decency, sincerity, involvement and respect.

Bømmler, Tine Ussing. 1994. *De normale samfund*. [Society is based on standards of normality]. Aalborg: Folaget ALFUFF.

Bømmler points out that integration and normalisation have become key-concepts in Danish social policy. On the whole all groups of clients must be socially integrated; at a minimum they must live as close to society's standards of normality as possible. Bømmler discusses this social-political approach to society's most vulnerable groups, and questions its positive effect.

Toft, Torben et al. 1997. *Myter eller Viden*. [Myth or Knowledge]. Copenhagen: Socialministeriet.

This anthology contains eleven essays on the relationship between citizens and the social service department. Among these are the following two:

(a) Koch-Nielsen, Inger; Firdberg, Torben; Gregersen, Ole; and Christensen, Else. 1997. *Hvad sker der – i virkeligheden?* [What actually happens?]. Pp. 113-125 in Toft, Torben et al *Myter eller Viden*. Copenhagen: Socialministeriet.

Three main issues are discussed in this essay: 1) the consequences of social welfare; 2) pressure deflected by expectations and vague objectives; 3) case work and organisation.

(b) Ebsen, Frank. 1997. *Brugerne i de sociale forvaltninger*. [Clients of social service departments]. Pp. 163-180 in Toft, Torben et al. *Myter eller Viden*. Copenhagen: Socialministeriet.

Ebsen concentrates on the relationship between caseworkers and social security claimants, identifying the main-factors that may influence it.

## **8. Efficiency, effectiveness and equity of social service provision and financing**

Dich, Jørgen S. 1973. *Den herskende klasse*. [The ruling Class]. Copenhagen: Borgen

Dich performs a critical Marxist analysis of the Danish Welfare State. He finds that the ruling class of the Danish welfare state is the growing group of public employees. Dich points out that their power is based not on property but on three factors: ability to create a social ideology established on a humanistic culture; the general flight from manual work; and the fear of illness and death. The consequence is a huge expansion of public employees with very good wages and limited workload.

Hansen, Hanne Foss. 1991. *Kapitel 9: Organisatorisk effektivitet og økonomistyring*. [Organisational effectiveness and financial management]. Pp. 185-196 in Hansen, Hanne Foss; Neergaard, Peter (Eds.): *Organisation og økonomistyring – Minzbergs Konfigurationer*. Copenhagen: Samfundslitteratur.

Foss Hansen considers, in this chapter, how effectiveness is assessed and how an effective organisation is characterised.

Hansen, Hanne Foss. 1992. *Organisatorisk effektivitet*. [Organisational effectiveness]. Pp. 277-313 in Jørgensen, Torben Beck; Melander, Preben (Eds.). *Livet i offentlige organisationer*. Copenhagen: DJOEF.

Hansen's chapter attempts to answer three questions: 1) How do employees and managers of organisations define effectiveness in their organisation? 2) How do external players define effectiveness? 3) How are organisations' abilities to live up to established criteria assessed?

Mikkelsen, Palle and Steenstrup, Jens Erik. 1982. *Offentlig produktion, produktivitet og effektivitet*. [Public production, productivity and effectiveness]. Copenhagen: AKF.

This publication analyses, in a number of ways, the public production of social services. The analysis was commenced in 1981 by the Research Institute of Local Government (AKF), its main purpose being to form a general view of the development of public social services. It also analysed the productivity and effectiveness of selected public sectors.

## 9. Patterns of relations among providers

Henriksen, Lars Skov. 1996. *Lokal frivillig organisering i nye omgivelser*. [Local voluntary organisation in new surroundings]. Aalborg: ALFUFF, Aalborg Universitet.

Skov Henriksen discusses the importance of voluntary social work through a case-study from Aalborg municipality, where the ideology of voluntary work occupies a prominent position in the local social policy. The book points to the significance of intensified interplay between public and private voluntary organisations for future social policy and structures of private voluntary organisations.

Klausen, Kurt Klaudi. 1997. *Sektorspecificitet eller institutionelt set-up*. [Sector-specification or institutionally set-up]. Pp. 157-179 in Fridberg, Torben (Ed.). *Hvem løser opgaverne i fremtidens velfærdssamfund?* Copenhagen: Socialforskningsinstituttet.

In this chapter Klausen considers possible social service providers. Klausen is not concerned with solving major social problems such as unemployment, transfer-payments, care of the elderly or social integration, but points out that solutions to these problems are and will continue to be chosen by politicians. The author deals with issues surrounding who social service providers will be, and by what background the advantages and disadvantages of different arrangements can be measured.

## 10. Innovation and change

Gregersen, Ole. 1999. *Kommuner i front – organisationsudvikling blandt kommunale socialforvaltninger*. [The municipalities in front]. Copenhagen: Socialforsknings instituttet.

In the design of Danish social legislation it is uncommon for the Danish parliament (the Folketing) to dictate the implementation of legislation, which is left largely to the discretion of municipalities. This report describes organisational development in the social services department of the municipalities, and focuses on mechanisms that might explain this development. Analysis of these issues is constructed using neo-institutional theory of organisations.

Gregersen, Ole. 1995. *Forandring i socialforvaltningernes organisering*. [Change in the Organisation of Local Social Service Administration]. Ph.D Afhandling nr.12.95 Handelshøjskolen i København. Copenhagen: Socialforskningsinstituttet

This report, the second part of a Ph.d. dissertation, analyses the organisational development and the working methods of Danish municipal social service administrations. The theoretical point of departure is the sociological version of the neo-institutional theory of organisation. Gregersen conducts his analysis on considerations of how the organisation of administration is driven by institutional processes. The main explanation is that a common understanding of social work is spread throughout the organisational field of municipal social service organisations. A driving force behind this process is that organisations imitate other organisations in the same field, while another driving force is that powerful actors in the field can attach sanctions to the adoption of a given organisational element.

Fisker, Jesper. 1995. *Forsøgsprojekter og offentlige organisationer*. [Experimental projects and local administration]. Copenhagen: AKF Forlaget.

Fisker looks at experimental and developmental projects within the social and

health service sectors, widely referring to activities involving new aspects of social and health service problems or new types of works with social service problems. Fisker points out that such projects are typically subject to a time limit, meaning decisions about the future of particular projects must be made at some point. Fisker concentrates on how experiences from these projects are anchored in public sector organisations. In the epilogue the author definitively states that experimental and developmental projects have found a natural place amongst a number of available and useful working instruments used to meet increased demands of flexibility and readiness to implement change in the social and health sectors.

Hulgård, Lars. 1997. *Værdiforandringer i Velfærdsstaten*. [Value-transformations in the Welfare State]. Copenhagen: Forlaget Sociologi.

Hulgård discusses voluntary work in the reproduction of a 'welfare society', investigating why individuals actually engage in this reproduction despite hardship such involvement brings. Hulgård finds disharmony between active and collective engagement in maintaining the welfare society, and the increasing individualisation of modern society. Thus Hulgård analyses "the strategy of experimentation" illustrated in the mid-evaluation of the SUM-program (Program of development on the field of social policy), taking Max Weber's sociological theories as the point of departure.

## 11. European Union and globalisation issues

Andersen, Bent Rold. 1991. *Velfærdsstaten i Danmark og Europa*. [The Welfare State in Denmark and Europe]. Copenhagen: Forlaget Fremad.

Rold Andersen points out that the public sector is expropriating resources that could be useful in the production of consumer goods and private services. However, the author emphasises that this is not necessarily a burden on the economy. He finds some advantages to the structure of the Danish public sector, such as the close connection between the health and social sectors, which provides opportunities to prioritise different expenses. But he finds weaknesses as well, for instance the clear-cut separation of payment and rights, which gives citizens an advantage in minimising their economic contributions to the public sector while drawing as many funds as possible. Andersen concludes that the development of the public sector and its assignments has benefited the middleclass and that it has been very difficult to make a political plan on redistribution favourable to the weakest groups.

Abrahamson, Peter and Borchorst, Anette. 1996. *EU og Socialpolitik – Rådet for Europæisk Politik Skrift nr. 13*. [The EU and social policy]. Copenhagen: Udenrigsministeriet.

This report concerns social policies of the EU and member countries. Of primary interest is social policy concerned with social dimensions, while policy relating to the labour market is not discussed. Abrahamson and Borchorst discuss the consequences of Danish membership in the EU for standards of social benefits in the Danish Welfare State. They keep the debate on an abstract theoretical level.

## 12. Bureaucratisation and/or commercialisation problems

Pedersen, Kjeld Møller and Petersen, Jørn Henrik. 1980. *Hvorfor kan den offentlige sektor ikke styres; Økonomisk politik – politisk økonomi*. [Why is the public sector uncontrollable]. Copenhagen: Berlingske Forlag.

Møller Pedersen and Henrik Petersen perform a political and economic analysis of the public sector. The purpose of the book is to contribute to the debate on the public sector and problems relating to its growth.

Andersen, Niels Åkerstrøm. 1996. *Udlisitering – Når det private bliver politisk*. [Put out to tender – when the private becomes politicised]. Copenhagen: Nyt fra Samfundsvidenskaberne.

Åkerstrøm Andersen analyses the privatisation of welfare-services. In two case-studies he points out that the development of welfare-services in Denmark has stagnated. Åkerstrøm Andersen's thesis is that a political logic follows when public assignments are put out to tender under private sector conditions. The consequences are that no one-sided market orientation takes place, a political-orientation remains in the operation of welfare services and private companies never actually control public assignments in terms of the market economy.

Christiansen, Peter Munk. 1997. *Er det nødvendigt både at styre og ro – og er det overhovedet godt? Om markedsløsninger inden for den sociale servicesektor*. [Is it necessary both to steer and pull – and is it a good idea at all?]. Pp. 63-93 In Fridberg, Torben. *Hvem løser opgaverne I fremtidens velfærdssamfund?* Copenhagen: Socialforskningsinstituttet.

The focal point of this article is alternative institutional reform in the organisation of social services. Christiansen mentions many different kinds of such reform but concentrates on contracting private companies for social services.

## 13. Comparative, cross-national issues

Rostgaard, Tine and Fridberg, Torben. 1998. *Caring for Children and Older People – A Comparison of European Policies and Practices. Social Security in Europe 6*. Copenhagen: Socialforskningsinstituttet [The Danish National Institute of Social Research].

The welfare mix of each country depends on historical, cultural and political influences. Comparison of welfare systems is therefore invaluable for assessing the welfare system of a specific country. This book presents the social care systems for children and older people in seven countries: Denmark, Finland, Sweden, England, the Netherlands, France and Germany. It provides an overview of the historical development of social policies, including the organisation, financing and provision of care in each country, and presents a comparative analysis.

Bengtsson, Steen. 1995. *To slags solidaritet – social service i en fransk by og i en dansk*. [Two kinds of solidarity – social services in a French and a Danish city]. Copenhagen: Omsorgsorganisationernes Samråd.

Bengtsson performs a comparative analysis of social service standards in France and Denmark. The analysis is based on a study of social services in the French city Montpellier and the city of Aarhus in Denmark, presenting a very solid study of social services in both countries. Bengtsson has performed similar comparative studies on social services in Denmark by comparing Aarhus standards with a German, an Italian and a Dutch city.

Daatland, Svein Olav (Ed.). 1997. *De sidste årene – eldreomsorgen i Skandinavien 1960-95*. [The last years – the care of senior citizens in Scandinavia 1960-95]. Norsk institutt for forskning og oppvekst, velferd og aldring.

This report explores the development of long-term care for the elderly in Scandinavia. It describes and attempts to explain similarities and differences in services and policies in Sweden, Denmark, and Norway historically and today. The introductory chapter outlines the purpose of the study and places services for the elderly within larger socio-demographic and social political contexts. Chapter two is mainly descriptive, using public statistics from the 1960's onwards to describe different service areas such as institutional care, sheltered housing, and domestic (community) services over time. Chapter three provides detailed analysis of home help services in the last decade based on survey data, concluding that variation across time and countries can hardly be understood as a response to varying needs, but rather as reflections of different policies. The concluding chapter puts the pieces together and focuses on analytical perspectives, identifying similarities and contrasts and presenting tentative explanations.

## 14. Current trends and policy issues; predictions

Dalgaard, Esben; Ingerslev, Olaf; Ploug, Niels and Andersen, Bent Rold. 1996. *Velfærdsstatens fremtid*. [The future of the Welfare State]. Copenhagen: Handelshøjskolens Forlag.

The authors focus on the waste of human resources arising from the fact that more than 900,000 Danes potentially engaged in active employment actually collect unemployment income. The book is built on award-winning articles by four economists who agree that the Danish welfare state is fairly good compared with many other countries, but that certain problems must be addressed if its high welfare standards are to survive in the future. Dalggaard (et al.) discuss different solutions to these problems, such as reprocessing a generally highly qualified working capacity, correcting the “system errors” of the welfare state, and a more active “mobility policy” to avoid structural unemployment.

### C. Special Fields

#### Child and Youth Welfare

Christensen, Else. 1998. *Anbringelse af børn – En kvalitativ analyse af processen*. [Placement of Children]. Copenhagen: Socialforskningsinstituttet.

Christensen analyses the process of child placement in twenty-three child placement cases, using qualitative interviews with children placed outside their homes, as well as with their parents, caseworkers, foster parents or employees at institutions where children were placed. Results are characterised as positive for about fifty percent of the children studied. The main indicator of positive results was the development of positive relations between the child and one or more adults in the home of placement. Christensen points out that professional and personal qualifications are also of decisive importance for positive results. If a child does not feel loved or wanted in the placement environment, a positive result is less likely.

Hestbæk, Anne-Dorthe. 1992. *Børn og unges fritidsliv i forsøgspektiv*. [The leisure-time-life of children and young people]. Copenhagen: Socialforskningsinstituttet.

This report contributes to the Danish nation-wide evaluation of the Program of Social Development (SUM), commenced in 1988 and concluded in 1991. Its main purposes were to encourage the reorganisation of social services and to develop new goals, methods and working procedures. The report evaluates empirical evidence and the experiences of a number of SUM-projects on relating to children and young people from 6–18 years old.

Jeppesen, Kirsten Just. 1992. *Socialt truede børn og unge*. [Socially threatened children and young people]. Copenhagen: Socialforskningsinstituttet.

This report contributes to the evaluation of the Danish SUM-program (summary above). Just Jeppesen evaluates 112 nation-wide SUM-projects concerned with socially vulnerable children and young people under age 18 and their families.

Additionally the report summarises the most important tendencies in these projects, and the developments and contributions to debate in this field.

## Family Services

Vedel-Petersen, Jacob. 1992. *Dagtilbud for børn under skolealderen – Struktur, vurdering og perspektiver*. [Daytime-childcare to children who are under school age]. Copenhagen: Socialforskningsinstituttet.

The book discusses public daytime childcare institutions for children under school age. Vedel-Petersen points out that this public system has achieved a fairly high standard that enables both parents of small children to enter the labour market under appropriate circumstances. However, Vedel-Pedersen still finds some problems: supply does not correspond with demand, creating waiting lists, lack of choice of childcare institution, and negative influence on dialogue between parents and employees.

Christensen, Else. 1996. *Daginstitutionen som forebyggende tilbud til truede børn – en undersøgelse af 769 daginstitutioner*. [The Daycare Institution as a Preventive Offer for Vulnerable Children]. Copenhagen: Socialforskningsinstituttet.

This report is based on a survey of 769 nurseries, day-care and integrated institutions nation-wide. It describes the possibilities and limitations of institutions for children who need special care. While Christensen finds great differences across various day-care institutions, attitudes towards problems are quite consistent. Additionally she finds consistent agreement concerning what characterises vulnerable children and on the possibilities and problems of co-operating with parents.

## Frail elderly, nursing homes, long-term care

Hansen, Eigil Boll and Platz, Merete. 1995. *Kommunernes tilbud til ældre*. [Local Authority Services for the Elderly]. Copenhagen: AKF Forlaget & Socialforskningsinstituttet.

This analysis of the Local Authority Services for the elderly by Hansen & Platz is based on a survey of 245 or 89% of Danish local authorities. It provides a current picture of housing and other services for the elderly across different types of local authorities and includes systematic investigation of whether there were differences between urban and rural councils and between Eastern and Western Denmark.

Hansen, Eigil Boll and Platz, Merete. 1995. *80–100-åriges levkår*. [The Living Conditions of 80–100-years-olds]. Copenhagen: AKF Forlaget & Socialforskningsinstituttet.

This report is based mainly on personal interviews with people between 80 and

100 years old in 75 municipalities of Denmark. The study asked where vulnerable elderly people live, what their housing conditions are, and whether their physical, emotional and social needs are satisfied in different forms of accommodation provided. Additionally the report reveals how many elderly people remain in their own homes against their wishes, what vulnerable elderly people themselves want with regard to housing and assistance, and what effect different policies on care of the elderly have on their security, welfare and need fulfilment.

Hansen, Eigil Boll; Eskelinen, Leena and Madsen, Jan Kargaard. 1999. *Hjemmehjælp og ældres velbefindende – en analyse af hjemmehjælpernes arbejdsprincipper i to kommuner*. [Home Help and the Well-Being of Older People – an Analysis of the Working Principles of Home Help in Two Danish Municipalities]. Copenhagen: Amternes og Kommunernes Forskningsinstitut.

The aim of this study is to answer the following questions: 1) How should 'home help' be described in order to elucidate the various working principles that are applied in work with the elderly? 2) How are the working principles reflected in the quality of services received by older people? 3) What is the significance of the general rules and conditions for the working principles of home help? The authors focus on working principles perceived to have a positive influence on the well-being of the elderly and their ability to make the most of their own resources.

## Health care related social services, convalescence and rehabilitation

Bømler, Tina Ussing. 1996. *En anden hverdag – om Psykisk Syge Misbrugere*. [A different weekday]. Aalborg University: Forlaget Alfuff.

This book evaluates experimental and developmental social services for the socially excluded and mentally ill in the Danish city of Aalborg. Work on these marginalised groups was initiated by the county of North-Jutland in 1993 in cooperation with the local authority of Aalborg and KFUM's social work, in order to develop different kinds of sheltered homes, care and support measures.

Juul, Søren; Troest, Annelise and Anker, Jørgen. 1994. *Kommunerne og de sindslidende*. [The municipalities and the mentally ill]. Copenhagen: Dansk Sygehus Institut and Socialforskningsinstitutet.

The report focuses on the work of local authorities serving the mentally ill. In particular the authors analyse the following three dimensions: 1) how public services for the mentally ill are designed by the local authority, 2) what the effects of public social services are in this field, and 3) how it can be improved. Additionally the report discusses this public social service in light of available knowledge about the mentally ill and their needs.

Jensen, Mogens Kjær. 1997. *Sociale boformer – boformer for psykisk syge, alkohol- og stofmisbrugere samt social udstødte og hjemløse*. [Forms of social housing for the mentally ill, alcoholics and drug addicts and for socially excluded people and homeless people]. Copenhagen: Statens Byggeforskningsinstitut and Socialforskningsinstituttet.

In December 1992 the Danish parliament called upon the government to take special action for 'socially marginalised' people. Action was to include the development of social housing with the assistance of both local and county authorities, with a view to permanent solutions for socially disadvantaged people including the mentally ill and substance abusers. In autumn 1993 the Ministry of Social Affairs requested that the Danish National Institute of Social Research and the Danish Building Research Institute carry out a joint assessment of government-subsided experimental forms of housing for different groups of socially disadvantaged and homeless people. This report by Kjær Jensen presents the conclusions of the assessment.

## Disabled

Bengtsson, Steen. 1997. *Handicap og funktionshæmning i halvfemserne*. [Disability in the 90s]. Copenhagen: Socialforskningsinstituttet.

Bengtsson presents an empirical study based on a random sample of Danes in the 18 – 60 age group. The two-stage selection process involved interviews with 10,800 persons, 24% of whom were found to have at least one disability or chronic disease, with whom depth interviews were undertaken. Disability is measured by a scale developed in a recent British survey and by a number of questions about life conditions – in particular work or work-related activities and use of social services. Results are compared with a similar study 33 years earlier. The proportion of persons with disabilities who are active in work or studies was found to be nearly the same as in the earlier study. While a greater number of persons with disabilities study today, the growth rate corresponds to that of the general population. Moreover, while there are a number of public social services for people with disabilities in Denmark, an astonishing number of users are dissatisfied with municipal services.

Høgsbro, Kjeld; Kirkebæk, Birgit; Blom, Sara Vafai and Danø, Else. 1999. *Ungdom, udvikling og handicap*. [Youth, development and disability]. Copenhagen: Samfundslitteratur.

This book concerns young people with a physical disability and their transition into an independent adult existence. It is based on a developmental project involving 23 young disabled people, with whom local authority caseworkers and user-organisation representatives developed a plan of action. It revealed many aspects of these youths' complicated situations including their interaction with the public system.

Olsen, Leif. 1998. *Viden, der gør forskel – erfaringsdannelse fra forsøg med viden-centre på handicapområdet*. [Knowledge that makes a difference – experiments with knowledge centres for disability]. Copenhagen: Københavns University, Sociologisk Institut.

Olsen's Ph.D. dissertation is based on experiments between 1994 and 1996 with "knowledge centres" for the disability field. The experiment is defined politically and professionally with reference to the general decentralisation of Danish society and services for the disabled. The motivation for experimenting with these knowledge centres is based on previous experience and assumptions suggesting that decentralisation creates "gaps" in professionals' knowledge within specific disability areas, thereby reducing the quality of support provided locally.

## Homeless, the poor, poverty

Kjær Jensen, Mogens. 1995. *Hjemløse med og uden egen bolig*. [Homeless with and without a home of their own]. Copenhagen: Socialforskningsinstituttet.

This book about homeless people seeks in particular to understand why the homeless return to public shelters when they are assigned a home of their own. The analysis is based on qualitative empirical material containing interviews with forty homeless people, the majority of whom are male, single, over forty years old, and often have a problem with alcohol.

Rosgaard, Tine; Koch-Nielsen, Inger; Stax, Tobias et al. 1994. *Homelessness in Denmark – FEANTSA – national report*. Copenhagen: Socialforskningsinstituttet.

The work on annual FEANTSA reports was commenced in 1994 by the European observatory on homelessness and is still running. The purpose of the Danish contributions to the reports is to present findings on homelessness in Denmark.

Koch-Nielsen, Inger and Stax, Tobias Børner. 1999. *The Heterogeneity of Homelessness and the Consequences for service Provision*. Pp. 429-454 in Avramov, Dragana (1999). *Coping with Homelessness: Issues to be Tackled and Best Practices in Europe*. Ashgate Publishing Ltd.

This chapter describes the urgent need for accommodation for the homeless. Koch-Nielsen and Stax point out that it is necessary to deal with the heterogeneity of homelessness and with the related concept of social exclusion. In the Danish context the question of accommodation is closely linked to preventive and re-integration measures, some recent examples (both general and more targeted) of which are presented in this chapter. Additionally the authors present some of the difficulties of evaluating measures and experiments in this field, especially at a European level. The chapter is based foremost on ongoing evaluations of accommodation and qualitative reports of different types of homeless people.

Stax, Tobias Børner. 1999. *Denmark*. Pp. 87-115 in Helvie, Carl O. and Kunstmann, Wilfried (eds). *Homelessness in the United States, Europe, and Russia – a Comparative Perspective*. USA, Westport: Bergin & Garvey.

This contribution to the anthology on Homelessness in the United States, Europe, and Russia, concentrates on homelessness in Denmark. The chapter gives a brief overview of the Danish welfare system to set the context for understanding homelessness and the measures taken to prevent it. Stax then describes attempts to assist and understand the homeless and socially excluded. In closing the author points out that the most important available resources for assisting socially excluded groups are preventive measures provided by the welfare state – e.g. free health care, education and transfer payments such as rent support, unemployment benefit and student-support payments.

## Unemployed

Weise, Hanne and Brogaard, Susanne. 1997. *Aktivering af kontanthjælpsmodtagere – en evaluering af lov om kommunal aktivering*. [The activation of recipients of social assistance]. Copenhagen: Socialforskningsinstituttet.

The Act on municipal “activation” programmes in effect since 1 January 1994 represents a continuation and extension of the „active line“ in Danish social policy and labour market policy. This Act establishes the framework for municipal programmes designed to ‘activate’ recipients of social assistance. ‘Social activation’ is an attempt to motivate and empower vulnerable groups to develop their involvement in society. One intentional consequence of the Act was to extend the target group to social assistance recipients age 25 years or older. The report focuses on participants’ perceptions of the process and benefits, the content of activation projects and their employment effects.

## Immigrants and refugees

Melchior, Marianne and Hjarnø, Jan. 1992. *Flygtninge og Indvandrere*. [Refugees and Immigrants]. Copenhagen: Sydjysk Universitetscenter & Socialforskningsinstituttet.

This report contributes to the nation-wide evaluation of the Program of Social Development (SUM) in Denmark, commenced in 1988 and concluded in 1991. The program encouraged the reorganisation and development of new goals, methods and working procedures in the field of public social services. This report evaluates empirical evidence on 149 SUM projects concerning refugees and immigrants in Denmark.

Jeppesen, Kirsten Just. 1993. *Skolen – en nøgle til integration? – De fremmede i Danmark 3*. [The school – a key to integration?]. Copenhagen: Socialforskningsinstituttet.

This book on the children of refugees and immigrants is the third in a number of publications on refugees and immigrants living in Denmark. Jeppesen summarises the knowledge in the field and focuses on school attendance by multi-lingual children.

Jeppesen, Kirsten Just. 1994. *Minoriteter og det sociale system – De fremmede i Danmark 4*. [Minorities and the social system]. Copenhagen: Socialforskningsinstituttet.

The book is the fourth in a number of publications on refugees and immigrants in Denmark (summary above). Jeppesen focuses on interaction between ethnic minorities from the Third World living in Denmark, and the Danish social welfare system. Jeppesen's illuminates the degree to which these ethnic minorities use the Danish social welfare system, concluding that it varies according to type of social services. For example ethnic minorities use preventive measures (e.g. preventive health care) less than the average population, but receive medical treatment, doctor visits and medical examinations more than the average population.

## D. Summary assessment of current debates

The Danish model of public social services has come under heavy criticism in recent years for being expensive and inefficient as well as paternalistic, and thus detrimental to both self-reliance and solidarity. In addition, it has failed to provide a satisfactory solution to a number of problems. Foremost are the problems of waiting lists, for example in day care centres and hospitals, and low-capacity in the area of home care for the elderly. Second, are problems with support for the most vulnerable, such as non-hospitalised mental patients and the homeless.

The crisis of legitimacy facing the welfare state has led to a number of deliberations regarding alternative ways of organising public social services, and whether it is desirable or possible to change the "welfare mix", i.e. the division of responsibility between the public sector, the marketplace and society at large. This debate began as a discussion on privatisation in the early 1980s. Within the social services sector the current headlines are: outsourcing, private sector employers' social responsibility, voluntary social work, the family's scope for handling problems, and the importance of strengthening individual self-reliance. The greatest concern about the future of social services is seen in demographic development, with "smaller" cohorts in employment having to support "larger" cohorts of elderly people.

# Finland

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## A. Synopsis of Social Service System

The goal of Scandinavian welfare states is to guarantee members an income-level that will ensure their full participation in society. The aim of social services is connected to the three primary objectives of the contemporary welfare state: social protection, equality and integration. The strong role of the public sector in social services, health care and education has created the notion of a 'service state'. Indeed, in Finland about one-third of social expenditures goes to social services.

In the Finnish context 'social' means that services should be universally accessible as well as reliable. Provision is publicly subsidised and supervised by public authorities. When using the concept of 'services', distinctions are typically made between informal care and formally organised services, and between desired help verses interventions imposed by social service authorities.

Although social services were previously an integral part of the social policy system, the term 'social service' was not commonly used in Finland until the 1970's, when the growth of social services gained speed. For example child day care became statutory for all municipalities in 1973, and open care was developed for the mentally ill. The 1977 Act emphasised rehabilitation, self-sufficiency and integration into society.

Several major reforms were implemented in the 1980's. The Social welfare Act of 1982 replaced the outdated and fragmented system of laws on welfare, such as the Social Assistance, Administration of Social Welfare, Child Guidance and Home Help Acts. Today social services broadly include child day care and care subsidies, child allowance, institutional care of children and young people, other services for children and families, sheltered work and activities for people with learning disabilities, home help services, informal care allowance, homes and services for the elderly and the disabled and care for substance abusers.

## B. Annotated Bibliography

Most of the volumes, reports and articles included here are published during the 1990's by Stakes, the National Research and Development Centre for Welfare and Health. For reasons of access the following bibliography focuses on publications in English.

## 1. Comprehensive works, overview volumes, classics on social services and the welfare system

Auvinen, Riitta. 1974. *Sosiaalipalvelu*. [Social service]. Helsinki: Kirjayhtymä. This informative book provides an overview of social service provision in Finland, however it is somewhat dated.

*Facts about Finnish Social Welfare and Health Care 1999*. Helsinki: Stakes. This comprehensive brochure contains basic numerical facts about social services.

Sipilä, Jorma; Outi Ketola; Teppo Kröger and Pirkko-Liisa Rauhala. 1996. *Sosiaalipalvelujen Suomi*. [Social services in Finland]. Porvoo: WSOY. This book provides the best overview of social services in Finland and is commonly used by students and practitioners in the field. It provides the ideological, theoretical, legal and political background as well as practical examples of social services in Finland today.

## 2. Supply and demand of social services

Andersson, Sirpa and Leila Simonen. 1996. *Uudistunut hyvinvointipalvelut maaseudulla*. [Welfare services in a state of renewal on the countryside]. Helsinki: Stakes, Raportteja 191.

This anthology of five articles is the final report of a research and development project carried out from 1993–1995, entitled “Structural change in the countryside and the re-organisation of care services”. The project develops and monitors new forms of social welfare and health services as means of enhancing the viability of the rural regions. It gives special attention to the purchaser-provider split, the privatisation of services and care entrepreneurship.

Kauppinen, Sari. 1999. *Yksityiset sosiaalipalvelut 1998 – Den privata socialservicen 1998*. [The private social services in 1998]. Helsinki: Stakes, Tilastoraportti-Statistikrapport – Statistical Report 26/1999.

Kauppinen provides a statistical overview of private social service providers in Finland, including nonprofit provision.

Sosiaaliturvan Keskusliitto. 1996. *Sosiaalibarometri 1996*. [Social Barometer 1996].

This publication discusses social services providers and their views of the well-being of the population of Helsinki.

### 3. Definition, forms and types of social services

Rauhala, Pirkko-Liisa. 1996. *Miten sosiaalipalvelut ovat tulleet osaksi suomalaista sosiaaliturvaa?* [How the social services became part of the Finnish social security system]. Tampere: Tampereen yliopisto, Acta Universitatis Tamperensis, ser. A vol. 477.

### 4. Organisational aspects, forms, ownership and auspices of provider

Kovalainen, Anne; Leila Simonen and Johanna Österberg. 1996. *Sosiaalipalveluyrittäjän muotokuva. Tutkimussosiaali- ja terveystalouden uusyrittäjistä ja vaihtoehtoisista palvelutuottajista.* [A portrait of the social service entrepreneur. A study of new entrepreneurship and alternative service providers in social welfare and health care]. Helsinki: Stakes, Raportteja 194.

Private service provision in social welfare and health care has increased as a consequence of a state subsidy reform, but above all due to the recession and rising unemployment. This book presents a study of new entrepreneurs in this field in spring 1995. New entrepreneurs responded to a questionnaire examining their education, career, motives and experience in the early stages of business. Information was also sought on turnover, clientele, quality of service, successes and difficulties.

Päivärinta, Tuija. 1993. *Jaettu vastuu. Tutkimus sosiaalipalvelujen organisoinnista Suomessa vuosina 1974–1990.* [Shared responsibility. An investigation of the organisation of social services in Finland in 1974–1990]. Helsinki: Suomen Kaupunkiliitto.

### 5. Financing

Heikkilä, Matti and Hannu Uusitalo (Eds.). 1997. *The cost of cuts.* Helsinki: Stakes, MU 125.

This edited volume studies cutbacks in social security and their effects on Finland in the 1990's.

Sihvo, Tuire and Hannu Uusitalo. 1994. *The impact of economic crisis on public support for the welfare state.* Helsinki: National Research and development Centre for Welfare and Health, Themes 7/1994.

This paper examines the relationship between the economic situation and public opinion supportive of the welfare state. It puts forward two hypotheses: (1) serious economic crises reduce support for the welfare state, (2) once a crisis is over, support will gradually return to the pre-crisis level. Opinion data from 1975 to 1992 gives considerable support to both hypotheses.

## 6. Staff and volunteers

Borgman, Merja. 1998. *Miten sosiaalialan työntekijöiden ammatilliset tulkinnat rakentuvat?* [How social workers create professional interpretations]. Helsinki: Stakes, TU 95.

Borgman investigates values and attitudes among social work professionals, drawing on interviews with students, teachers and practitioners in the field.

Suomen Virallinen Tilasto (Official Statistics of Finland) *Sosiaalipalvelujen henkilökunta 1990*. [Social service staff 1990]. Helsinki: Sosiaaliturva 1991:4.

## 7. Clients, users, consumer issues and profiles

Haverinen, Riitta; Leila Simonen and Irma Kiikkala (toim.) 1998. *Kohtaamisia sosiaali- ja terveysalan areenoilla*. [Meetings in social and health care]. Helsinki: Stakes, RA 221.

The seventeen articles in this volume present various approaches to the questions of how professionals and consumers/clients meet, and how better practices may be developed.

Sihvo, Tuire. 1984. *Muutokset sosiaalipalvelujen käytössä sekä vertailu Suomi-Ruotsi*. [Changes in the use of social services and a comparison between Finland and Sweden]. Helsinki: Sosiaalihallitus, suunnittelu- ja tilastotoimiston julkaisusarja nro 14.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Arnkil, Tom Erik, Esa Eriksson and Robert Arnkil. 1999. *Anticipation Dialogues. Vertical and Horizontal Dialogue "Methods for Strategic Management and Smart Networking"*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 3/1999.

The paper presents empirical examples and practical applications of the development of municipal social services in connection to strategic city management. It draws from a study of two cities involved in a project to develop cross-sectional psycho-social services for children, adolescents and families, and cross-sectional services for the elderly.

Heikkilä, Matti, Timo Karjalainen; Anne Kovalainen; Tuomo Melin and Leila Simonen. 1994. *Restructuring of the welfare state. Productivity and effectiveness of social services*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 8/1994.

## 9. Patterns of relations among providers

Heikkilä Matti and Jouko Karjalainen. 1999. *Leaks in the safety net. The role of civil dialogue in the Finnish inclusion policy*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 1/1999.

The four chapters in this report provide: (1) a concise account of the theory of Finnish welfare policy, (2) “the Finnish survival story” i.e. the Finnish welfare state in the throes of the worst recession in this century, (3) the dialogue between non-government organisations and the public sector, and (4) analysis of a new innovation in combating social exclusion in Finland – the food bank activities of the church.

## 10. Innovation and change

Haverinen, Riitta. 1999. *Palvelusitoumukset ja hyvinvointivaltion palvelujärjestelmän käänne*. [Service Charter and the Turning Point in the Service System of the Welfare State]. Helsinki: Stakes, Tutkimuksia 106.

This study discusses the preparation and introduction of service charters in order to examine interconnected changes in public service modernisation, the welfare state and decentralisation in three cases (Suomela, Sveaby and Englton) in Finland, Sweden and England. Findings suggest a need for local socio-political value debate, clarification of the concepts of social services, and analysis of public service orientation. Analysis and evaluation is also needed regarding the interactive forums of municipal residents/clients, the political arena and implementation, and subsequently the consequences of public service modernisation and the prioritisation of welfare services from the viewpoint of service clients.

Tapaninen, Annikka; Tapani Kauppinen and Marja Kurenniemi. 1999. *Sosiaalinen penkki eli kehittäjän ymmärrys*. [The Social Bench, or the Developer’s Understanding]. Helsinki: Stakes, Rapporteja 238.

The “Social Bench” was carried into seven municipalities, and representatives of both the social and the technical staff sat down beside developers. These sittings are the subject of this report. It finds that the subsequent change in service structure was linked to more extensive cultural change. After an overview of the past and the present, a vision was offered of a future where services are sensitive to case-specific situations. Work progressed on very different topical projects such as land-use planning, neighbourhood improvement, traffic planning and strategies for elderly care.

## 11. European Union and globalisation issues

Kautto, Mikko (Ed.) 1997. *European Social Services – Policies and Priorities to the Year 2000*. Helsinki: National Research and Development Centre for Welfare and Health.

This report from a European expert meeting on social services discusses policies and priorities to the year 2000. Two key priorities of European welfare states at the turn of the century are addressed: financial constraints and social exclusion. This arises as the demand and expenditure for social care services seem to be increasing in all West European countries while welfare states face a general financial crisis.

Savio, Annikki. 1995. *Soft methods in the European Union social policy. Target-oriented guidance as a welfare strategy*. Helsinki: Stakes, MU 71.

The report describes the social policy of the European Union as a strategy planning instrument and set of procedures. It explains what 'European Union' means in speaking of the social dimension, the furthering of economic and social interests or European welfare models.

## 12. Comparative, cross-national issues

Anttonen, Anneli and Jorma Sipilä. 1994. *Viisi sosiaalipalvelumallia. Eurooppalaisten hyvinvointivaltioiden vertailua sosiaalipalvelujen näkökulmasta*. [Five models of social service. A comparison of social services in European welfare states]. JANUS 3, 226-248.

Sipilä, Jorma. 1996. *Social Care Services: The Key to the Scandinavian Welfare Model*. Aldershot: Avebury.

Uusitalo, Hannu. 1994. *Social security in the Nordic countries*. Helsinki: National research and Development Centre for Welfare and Health, Themes 11/1994. Uusitalo presents a short overview of the principles of social security in Denmark, Finland, Iceland, Norway and Sweden as compared to Japan. Future challenges for the Nordic countries are discussed in conclusion.

## 13. Current trends and policy issues; predictions

Forma, Pauli. 1999. *Interests, Institutions and the Welfare State. Studies on Public Opinion Towards the Welfare State*. Helsinki: Stakes, Research Report 102.

This study draws an exceptionally comprehensive picture of opinions on social security and the welfare state in Finland. It analyses opinions on income transfers and social services and those on the labour market. The volume includes inter-

national comparisons and utilises various data sets that allow comparison of changes in opinions over a period of several years. The study also examines attitudes towards the welfare state among different elite groups of Finnish society.

Kananaja, Aulikki. 1999. *The Finnish national strategy for the development of social work*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 4/1999.

In the mid-1990's several working groups were founded by the Ministry of Social Affairs and Health preparing proposals for the development of social work and social services. In order to link the results of this work together a more comprehensive approach was needed. This strategic document was an outcome of these efforts.

Kröger, Teppo. 1996. "Policy-makers in Social Services in Finland: The Municipality and the State". *Scandinavian Journal of Social Welfare* 5.

## 14. Other topics not elsewhere covered

*The promise of the Information Society*. 1998. Helsinki: Stakes, MU 142.

Using case studies and analysis this book provides the first comprehensive resource on good practice in using the information society for the benefit of the elderly and the disabled. It identifies the issues that must be addressed if we are to create new opportunities and avert potential threats.

## C. Special Fields Child and Youth Welfare

Ahlström, Salme; Kari Haavisto; Eeva Liisa Tuovinen and Leena Metso. 1997. *Finnish country report for the European school survey project on alcohol and drugs*. Helsinki, Themes 1/1997, National Research and Development Centre for Welfare and Health.

The authors discuss a survey of drinking habits and drug use among representative nation-wide samples of 12, 14, 16, and 18 years-olds.

Riihelä, Monika and Niina Rutanen (Eds.) 1998. *Visible child – invisible quality. Summary report on the International Conference 15-17 November 1997, Helsinki, Finland*: National Research and Development Centre of Welfare and Health, Themes 5/1998.

This compendium of sixteen contributions deals with children and childhood issues. It first discusses emerging constructions of early childhood and young children, then addresses the implications of new constructions.

Wiman, Ronald. 1994. *On the rights of children with special needs in changing Europe*. Helsinki: Themes 10/1994, National Research and Development Centre for Welfare and Health.

In this publication four papers focus on the prerequisites for the materialisation of the rights of children with special needs in Central and Eastern European countries, drawing on examples from Finland to illustrate some features of the Scandinavian welfare state strategy.

## Family services

Forssén, Katja. 1998. *Children, families and the welfare state*. Helsinki: Stakes, TU 92.

This book describes the distribution of welfare in Finnish families with children in the 1990's, and evaluates how well family policy has succeeded.

Taskinen, Sirpa (toim.) 1993. *Itke vain sydämein*. [Cry my heart]. Helsinki; Stakes, RA 84.

Taskinen presents strategies to solve family related conflicts, providing background material for individual solutions to family disputes.

Taskinen, Sirpa (toim.). 1994. *En ole katkera, mutta kuitenkin . . .* [I am not bitter, but still...]. Helsinki: Stakes, RA 166.

This report on a project about the divorce process aims to develop methods of solving family disputes.

Virtanen, Petri. 1994. *Services integration for children and youth at risk and their families*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 4/1994.

The purpose of this Finnish report of a project including twelve countries was to compare different service arrangements and to identify examples of best practice. It focuses on national and regional level legislation and policies in Finland, and presents the main outlines of the Finnish educational system, employment services for young people, and integrated services.

## Frail elderly, nursing homes, long-term care

Keinonen, Turkka. 1994. *Home systems for elderly residents – a usability study*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 1/1994.

Smart homes are meant to improve the elderly ability to cope with daily activities. In this study, home usability is divided and assessed along different tasks as

going to sleep or returning home from a visit. The resident controls the tasks and the system supports him or her to adjust the home for each activity.

Levon Bengt-Vilhelm. 1994. *Everyday living environments of elderly persons*. Helsinki: National Research and Developing Centre for Welfare and Health, Themes 2/1994.

This research reveals living environment details that might be critical for the well-being of elderly residents, and proposes guidelines for developing suitable living environments. It draws on inventories of forty flats in Hämeenlinna and twenty flats in Tampere, and interviews with their inhabitants.

## Health care related social services, convalescence and rehabilitation

Karjalainen, Vappu and Saikku, Peppi (toim.). 1998. *Vuoropuhelun aika*. [Time for a dialogue]. Helsinki: Stakes RA 236.

This report describes client-oriented approaches and co-operation in the rehabilitation process.

Saikku, Peppi. 1996. *Yhdistävät käytännöt*. [Connecting practises]. Helsinki: Stakes, RA 201.

Saikku investigates agencies dealing with rehabilitation, focusing on their networks from the consumer's point of view.

Winell, Klas and Tomi Ståhl. 1998. *Kuntalaisten kontoutuspalvelut*. [Rehabilitation services provided by municipalities]. Helsinki: Stakes, RA 226.

This overview and guidebook focuses on rehabilitation services – including private service providers – and consumer categories in three Finnish municipalities.

## Disabled

Loijas, Sari and Aini Merentie (Siht.) 1995. *Kohti yhteiskuntaa kaikille: vammaispoliittinen ohjelma*. [Towards a society for everybody: a policy for caring for the handicapped]. Helsinki: Sosiaali- ja terveystieteiden ministeriön julkaisuja; 10/1995.

Nouko-Juvonen, Susanna. 1995. "Kehitysvammaiset rakennemuutoksessa – kunnasta palvelujen tuottaja". [Services for the disabled in structural change – municipalities as service providers]. *Kunnallistieteellinen aikakauskirja* 22 (3), 201-210.

Pättikangas, Mervi. 1991. *Vammaispalvelujen tarve Helsingissä*. [Request for services for the handicapped in Helsinki]. Helsinki: Kuntoutussäätiön tutkimuksia; 29.

## Homeless, the poor, poverty

Hannikainen, Katri and Sirkka-Liisa Kärkkäinen. 1997. *Young people and the risks of exclusion and homelessness*. Helsinki: Themes 14/1997, National Research and Development Centre for Welfare and Health.

This report contributes to the debate on homelessness by describing the housing situation of young people in Finland today. With a view to compiling the report, the Housing Fund of Finland questioned municipal authorities about homelessness in the course of its annual housing market survey. The report briefly outlines Finland's housing policy, social security and social services with special reference to young people.

Kangas, Olli and Veli-Matti Ritakallio (toim.) 1996. *Kuka on köyhä?* [Who is poor?] Helsinki: Stakes TU 65.

These articles about the poor in Finland in the 1990s present various points of view on the subject.

Kärkkäinen, Sirkka-Liisa; Katri Hannikainen and Iiris Heikkilä. 1998. *Services for homeless people. The Policy context from 1960s until the Present Day and Two Examples of Innovative Services*. Helsinki: National Research and Development Centre for Welfare and Health, Themes 21/1998.

Finland's third national report for the European Observatory on Homelessness focuses on the differentiated services for homeless people, and schemes for providing people in need with services that enable them to stay in their homes. Examples are given of innovative services.

## Unemployed

Kortteinen Matti and Hannu Tuomikoski. 1998. *Työtön*. [Unemployed]. Helsinki: Tammi.

The author discusses findings of a study of how unemployment affects the individual, presenting interesting views drawn directly from the mouths of unemployed.

Kuisma, Minna. 1994. *Työttömänä selviytyy*. [To survive as unemployed]. Helsinki: Stakes RA 162.

Kuisma presents findings of a survey about survival strategies and behaviour among the unemployed in three municipalities in Northern Finland.

## Immigrants and refugees

Muuri, Anu (Toim.) 1990. *Pakolaislapsi suomalaisessa päivähoidossa*. [Refugee children in Finnish day care]. Helsinki: Sosiaalhallituksen raporttisarja; nro 14/1990.

Ruusunen, Mia. 1998. *Maahanmuuttajat Suomessa ja heidän integroituminen yhteiskuntaan*. [Immigrants and their integration into Finnish society]. Helsinki: Sisäasiainministeriö 5/1998.

Salmimies, Okko-Pekka. 1994. *Pakolaispoliittinen yhteistyö Euroopassa: Integraatiokohityksen vaikutuksia Suomen asemaan*. [European co-operation in refugee policy: the impact of integration policy on Finland.] Helsinki: Ulkopoliittinen instituutti.

Suomen Kaupunkiliitto. 1988. *Pakolaiset ja kunta*. [Refugees and municipality]. Helsinki.

## D. Summary assessment of current debates in the field

Due to economic recession in the last decade, prominent debates about social services in the welfare state have shifted direction from political and ideological issues to economic aspects. However, as the economic situation has stabilised in Finland, greater interest has been generated regarding future challenges. In this several important themes have emerged. The first is the idea that social service expenditure ought to be regarded not only as public consumption, but also as an investment in human and/or social capital. Second, as demographic trends expand the need for social services, especially among the elderly, expanded social services for children and families could become a means of influencing demographic trends. Third, the effects of new private social services providers on both the costs and the quality of services may increase the role of non-profit providers. Fourth, there is a need for a more holistic view of the needs of the population in order to create new arenas for co-operation involving decision-makers and experts from different fields.

## France

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### A. Synopsis of Social Service System

In France social welfare services are known as *aide sociale*. This term refers to social assistance in cash or in-kind outside the public social security scheme. The five traditional social service areas are those for the elderly, the disabled, the unemployed, children and adults at risk, and family services. However, these fields have expanded to target socially excluded and disadvantaged populations such as minorities, immigrants, substance abusers and the non-elderly needing home care services.

The total size of the French social welfare economy, including social security, exceeds the European average. At FF 2,872,2 million (SESI, 1998) in 1997 it constituted a sizeable 30% of the country's GDP, and throughout the 1990s maintained an annual growth rate of about 4%. The social services economy excluding the social security scheme is small in comparison, accounting for FF 289,5 million in 1997 (SESI, 1998). The personal social services, which in this bibliography further exclude education, health care and monetary transactions, fall within this category.

The French social services system is characterised by a strong interdependence between public agencies and nonprofit organisations. The third sector's role was stimulated by the instatement of 1982-1983 Decentralisation Acts, which redistributed social service responsibilities to local governments and brought about the fundamental shift from a highly centralised system to one which is largely decentralised. Facing new social welfare responsibilities in a context of budgetary crisis, local governments contracted out the provision of many services. Local authorities contracted for-profit providers for equipment, open spaces management, public construction and economic services, but favoured partnership with nonprofit organisations (in France called *associations*) for cultural and educational concerns and above all for social and employment services. Some private for-profit organisations also offer social services, primarily residential facilities for the elderly, but they are few in number.

Interdependence between public agencies and nonprofit organisations can be seen in division of responsibilities for various social services, service provision and

service financing. National social policy primarily targets compulsory insurance and income redistribution, while municipal level social policy targets community level aid, including services, which complement national aid (see Tchernonog, 1992). Government limits its role as a provider of in-kind services primarily to residential facilities, particularly for the elderly, while increasingly financing non-profit organisations to provide in-kind services across all social service categories. Nonprofits thus dominate personal social service provision, including home care services, follow-up care, and developing responses to new social needs.

Public transfers to nonprofit social service providers are discretionary or contractual rather than statutory, however most nonprofit service providers do indeed receive public support which they may supplement with private earnings. Financing schemes differ across two main types of social services: residential and non-residential care. Residential facilities for the disabled, the elderly and other frail populations are financed up to three-quarters with public money (primarily social security), and up to one-quarter by users. Non-residential services rely additionally on the private earnings of service organisations (i.e. dues and fees, and in some cases donations).

In 1990, there were 25,520 nonprofit organisations providing personal social services, with an annual operating expenditure of FF 75,041 million, including voluntary time. They received 60% of their financing from public resources (through taxation), 35% from private earnings (i.e. dues, fees, investments) and 4.8% from private donations. They operated 55% of all residential care facilities (altogether catering to some 800,000 individuals), with a quasi-monopolistic position in facilities for the disabled, substance abusers and children in social difficulty. But when nursing homes are excluded their share of residential service provision rises to 87%, while public services fall from 41% to 12% and forprofit services fall from 4% to 1%. (Archambault, 1997).

Nonprofit organisations are also an important source of employment in social service occupations. Employment in nonprofit social service organisations doubled between 1980 and 1990 as an effect of the new decentralised service delivery scheme coupled with rising unemployment and needs for social services generally. By 1990 these organisations were providing jobs for more than half of all social workers and for 58.1% of all staff in the third sector. Altogether they employed more than 300,000 full-time salaried workers (Archambault, 1997). Employment continued to increase after 1990, growing more in the light social services than in larger social service establishments due to the continuing development of new nonprofit organisations and local and home care services – or *services de proximité* – for the elderly, the disabled and children.

*Share of public agencies, nonprofit organisations and other private organisations in the delivery of personal services in France, 1990*

Type of service/target group	Characteristics	Share of service provision by provider		
		Public agencies	Nonprofit organisations	Private Forprofit organisations
The disabled	Establishments	8.1%	89.1%	2.8%
	Employment	11.0%	85.2%	3.8%
Protection of children	Establishments	14.3%	82.6%	3.1%
	Employment	26.3%	70.3%	3.4%
Adults in social difficulty	Establishments	11.3%	86.5%	2.1%
	Employment	17.1%	81.0%	1.9%
Homes for the elderly	Beds provided	58.0%	29.1%	12.8%
	Employment	59.5%	27.8%	12.7%
Child day care	Establishments	60%	40%	
Housekeeping services	Establishments	30%	60%	10%
Home care services	Beds provided		70%	
Family home help	Services provided		96%	

Source: SESI, UNIOPSS

## B. Annotated Bibliography on Social Services in France

### 1. Comprehensive works, overview volumes, classics on social services and the welfare system

Archambault, Edith. 1997. *The nonprofit sector in France*, The Johns Hopkins Nonprofit Sector Series, Manchester UP.

Archambault presents findings of the *Johns Hopkins comparative nonprofit sector project*, revealing that nonprofit organisations have become one of the clearest expressions of social and cultural change in France. Archambault argues that nonprofit organisations have a unique ability to unite private initiative and public concerns, thereby becoming the flexible partners of modern social policies. She presents their history from the Middle Ages to the present, describing the institutionalisation of freedom of association and nonprofit legal status. She offers empirical analysis showing that despite the Jacobin tradition, the scope of the French nonprofit sector is comparable to that of other European industrial countries but its structure and financing are specific. She discusses recent trends in the major subsector of social services, and explores government policy in the field. In conclusion Archambault argues that in France as in other western democracies, the state is losing its monopoly as the embodiment of public good.

Bloch-Lainé, François (Ed.). 1999. *Faire société. Les associations au cœur du social*. [To make society: associations at the heart of the social]. Paris: Syros. Celebrating the centenary of the 1901 Act which granted freedom of associations in France, and in the past few decades the rapid growth of nonprofit organisa-

tions, particularly in health and social service fields, this edited collection looks closely at the French nonprofit sector from a multidisciplinary perspective. In their position between the state and the market, nonprofit organisations need to enhance their solidarity and the specificity of their roles. This collection attempts to answer questions such as: how to measure nonprofits' social utility and reinforce givers' trust, what kind of involvement and follow-up beneficiaries should have, how volunteers should be trained and whether stakeholder-governance is possible. Melding theoretical reflection, empirical research and case studies, this book highlights the dynamism of participative democracy as an alternative to representative democracy.

Enjolras, Bernard.1995. *Le marché-providence. Aide à domicile, politique sociale et création d'emploi*. [The welfare market: Home care, social politics and job creation]. Paris: Desclée de Brouwer.

Enjolras asks whether it necessary to replace the crisis of the welfare state with a "welfare-market", or whether forms of regulation which guarantee equity and social cohesion can be promoted. By analysing the role of public regulation and the specificities of a nonprofit alternative, Enjolras calls for a socio-economic approach and illuminates our choices. Looking at France, Great Britain, the United States and Norway, he places the French model in comparative perspective.

Hannequart, A. et Greffe, Xavier.1985. *Économie des interventions sociales*. [The economy of social intervention]. Paris: Economica.

Hannequart and Greffe examine the capacity of public institutions to efficiently achieve the objectives with which they are entrusted. They begin with an analysis of the advantages and risks of social protection systems, in light of the fact that Western societies are increasingly concerned with the continuing development of the contents and effects of social service interventions, which indeed some would like to see reduced. The authors analyse and compare the effects of collective facilities, regulations, judicial decisions, and financial transfers. Adopting a unique methodological language, they evaluate different institutional arrangements that could be used.

Rosanvallon, Pierre 1998. *La nouvelle question sociale. Repenser l'Etat-providence*. [The new social question: rethinking the welfare state]. Paris: Seuil.

Rosanvallon shows that a fundamental practical and philosophical justification for traditional welfare policies – namely that all citizens share equal risk – has been undermined by social and intellectual change. He begins by tracing the history of the welfare state and its founding premise that social risk is equally distributed and predictable. He then shows that due to economic diversification, some individuals in fact face greater risk than others. If the goals of social solidarity and civic equality are to be achieved, he argues, social programmes must be radically rethought, in particular they need to be more narrowly targeted.

Rosanvallon draws international examples, focusing particularly on France and the United States to show how social programmes could better reflect individual needs.

Thévenet, Amédée. 1999. *L'aide sociale aujourd'hui: Apres la decentralisation*. [Social services today: after decentralisation]. 13th edition. Paris, ESF.

In the thirteenth edition of this overview volume which serves as a basic text for those working in the sector, Thévenet provides a detailed description of the social services system in France. He reviews the history of relevant legislation and explains policy-makers' intentions both before and after the structural reforms and new partnerships brought on by the decentralisation acts in the early 1980s. He then examines the general categories of social services, their evolution and reform. In particular he reviews welfare services for children and families, the elderly, the disabled, housing and social integration, as well as medical-social services.

## 2. Supply and demand of social services

Afchain, Jean. 1997. *Les associations d'action sociale-Outils d'analyse et d'intervention*. [Social action associations: tools of analysis and intervention]. Paris: Dunod. Afchain studies the organisation, strategies and missions of social action associations or nonprofit social service organisations. He proposes tools of analysis to reveal their role as one which is reducible neither to the logic of the market nor to one of power, and suggests concepts to clarify our understanding of the mixed model of social services in France. The operation and legitimacy of social action associations is discussed taking into account public politics, growing demand and increasingly diversified clientele.

Eme, B. 1991. "Les Services de proximité". [Personal social services]. *Informations Sociales*, Aug-Sep. No. 13, 34-42.

Eme discusses new social demand for new services which have resulted in the growth of the new "services de proximité", or local and neighbourhood services. Demand has arisen from socio-demographic, institutional and technological change, such as the ageing population, the growing female labour force, transformations of the family, and the integration of new communication technologies. The diverse services emerging to cope with such changes include aid to the elderly and disabled, child care, local information centres and services to encourage small enterprises. Eme discusses the reciprocity between offer and demand for these new social services, in particular as a growing social response to massive demand for employment. He reviews employment integration measures and the logic of creating new local social services within the mixed economy of welfare, and ultimately considers the possibility of strengthening the contractual or partnership model of the welfare state.

Grefre, Xavier. (Ed.). 1990. *Nouvelles demandes, nouveaux services*. [New demands, new services]. Commissariat général du plan, Paris: La Documentation Française.

Noguès, Henry. 1997. "La production de l'action sociale: Entre le besoin, la demande et l'offre". [The production of social action: between need, demand and offer]. *Informations Sociales*, No. 57; pp. 4-15.

Noguès discusses the production of social action not only as a response to need, but in terms of the logic of both demand and offer within a mixed economy of care. In France, welfare pluralism involves both civil society and public responsibility, creating local initiatives and defined at a central level by legislators. Noguès attempts to open debate regarding our understanding of the general conditions which create social action, taking an interdisciplinary and historical approach. He discusses the evolution of 'rights' which determine 'who has need'. In this he considers factors such as the size the group demanding rights whose needs are recognised, the engagement of actors or 'social entrepreneurs', particularly in the associative sector, and social needs as effects of the system of social action itself. Ultimately Noguès argues that demand is not a passive variable, thus distinguishing it from need. He proposes a model in which beneficiaries may stand at the intersection between demand and need, or may be positioned at points more on the side of need than demand, or more within demand than need – each resulting in different possibilities for recognition of social rights.

Ridder, Guido de (Ed.). 1997. *Les nouvelles frontières de l'intervention sociale*. [New frontiers of social intervention]. Collection « Logiques sociales », L'Harmattan.

This edited collection considers the profound transformation of public politics in the social domain. Contributors discuss a series of themes: 1. the crumbling of the 'salaried society' and increasing vulnerability; 2. The forces that shape social choices; 3. The accelerated evolution of social services and the development of new demands and needs; and 4. The impact of new models of work, looking comparatively at France, other European countries and North America.

### **3. Definition, forms and types of social services**

Barreyre, Jean-Yves (Ed.). 1995. *Dictionnaire de l'Action sociale*. [Dictionary of social action]. Paris: Bayard.

In this comprehensive volume social action is explained in 220 key words which express the essential meaning and at times the ambiguity of the most frequently used terms in the field. This work provides a basic reference tool for professional social workers, researchers and students.

Hardy, Jean-Pierre. 1999. *Guide de l'Action sociale contre les exclusions*. [Guide to social action against exclusion]. Montrouge: Dunod.

Hardy provides an overview of the combination of measures being used to combat social exclusion, presenting detailed description of their organisation and application to specific fields and programmes: economic, social and professional integration; minimum income guarantee (RMI), right to housing and access to health care. He also discusses the co-ordination and evaluation of social action against exclusion. This significant work offers an important reference tool for academics and practitioners alike.

Majnoni d'intignano, Béatrice. 1997. *La protection sociale*. [Social protection]. Paris: La Découverte.

Returning to the historical origins of the welfare state and its operation, this comparative work looks at types of coverage for sickness, old age, unemployment and social exclusion. The author studies social systems in England, Germany and France, questioning their respective effectiveness and their evolution in light of European integration and global competition. This new edition analyses recent reforms in France and abroad, and presents original thought on how to adapt social politics in a Europe with fewer children and diminishing professional activity among people aged 25 to 55.

Mondolfo, Philippe. 1997. *Repenser l'action sociale: missions, moyens, méthodes*. [Rethinking social action: missions, means, methods]. Paris, Dunod.

This work on the transformation of social action speaks to the heart of the debate about new forms of social integration, shedding light on changes in 'the social question', models of professionalism and management.

Thévenet, Amédée. 1999. *L'aide sociale aujourd'hui: Apres la décentralisation*. [Social services today: after decentralisation]. 13th edition. Paris, ESF.

In the thirteenth edition of this overview volume which serves as a basic text for those working in the sector, Thevenet provides a detailed description of the social services system in France. He reviews the history of relevant legislation and explains policy-makers' intentions both before and after the structural reforms and new partnerships brought on by the decentralisation acts in the early 1980s. He then examines the general categories of social services, their evolution and reform. In particular he reviews welfare services for children and families, the elderly, the disabled, housing and social integration, as well as medical-social services.

#### **4. Organisational aspects, forms and auspices of provider**

Afchain, Jean. 1997. *Les associations d'action sociale—Outils d'analyse et d'intervention*. [Social action associations: tools of analysis and intervention]. Paris: Dunod.

Afchain studies the organisation, strategies and missions of social action associa-

tions or nonprofit social service organisations. He proposes tools of analysis to reveal their role as one which is reducible neither to the logic of the market nor to one of power, and suggests concepts to clarify our understanding of the mixed model of social services in France. The operation and legitimacy of social action associations is discussed taking into account public politics, growing demand and increasingly diversified clientele.

Boumendil, Judith et Triomphe, Annie. 1996. « La place des associations dans la gestion des services sociaux ». [The role of associations in the management of social services]. *Revue des études coopératives, mutualistes et associatives*. No. 259 (57), pp.16-24.

Boumendil and Triomphe present recent data on social services and health care associations (not previously updated since 1984) using the bi-annual “ES” survey conducted by the Ministry of Social Affairs. In this article the authors assess the role of associations in providing care to the disabled—both children and adults, and both emotionally and physically disabled. They find that associations provide more than 80% of all institutions, jobs and recipient care in this sector. They subsequently consider the political effectiveness of the nonprofit status given the very large geographical differences and uneven distribution of associations.

Lavill, J.L. 1992-93. “Associations et services de proximité”. [Associations and personal social services]. *Revue des études coopératives mutualistes et associatives*, vol.71, No.44-45(247), pp.194-198.

In this article local social services are discussed in relation to the theory of institutional choice (offering market, state, and voluntary sector forms of service provision) and economic anthropology (economic principles being the market, redistribution, reciprocity, and domestic administration). Laville describes the expansion of local services corresponding with the attempt by nonprofit organisations (“associations”) to reposition their activities; in periods of crisis, local services not only encounter uncertainty but also intervene in the construction of public politics that define models of social intervention.

Laville J.L. et Nyssens M. 2000. “Solidarity-based third sector organizations in the ‘proximity services’ field: An overview of francophone perspectives”, *Voluntas*, March, Vol.11, No.1, pp.67-84.

Laville and Nyssens review the role of third sector organisations in the field of ‘proximity services’ (local or neighbourhood social services) in France and Belgium, taking an economic sociology perspective. The authors analyse how the new wave of initiatives inside the third sector can be seen as providing institutional responses to state and market failures that arise from trust-dependent and quasi-collective attributes of these services. These initiatives are often called ‘solidarity based third sector organisations’, a concept defined in this paper. A central assumption of the analysis is that the political context in which these services

are delivered is especially important, particularly as reflected in the changing regulatory role of the state.

Lhuillier, Jean-Marc. 2000. *La responsabilité civile, administrative et pénale des établissements et services sociaux et médico-sociaux*. [Civil, administrative and penal responsibility in social and medial-social institutions and services]. 2è édition. Rennes: École nationale de la santé publique.

In its second edition this publication discusses the continuing development of responsibility among professionals in the social sector. Lhuillier provides detailed analysis of ways of designating responsibility, the conditions of their use and the foundations of these rules. This edition takes into account the latest evolution in civil and administrative jurisprudence, which are not unfavourable to social workers. The author gives considerable attention to penal responsibility, in particular as injuries to service users sometimes lead to criminal convictions of social workers. He comments on the law of 10 July 2000 relating to non-intentional offences, which are redefined less severely and should limit the responsibility of directors and personnel in social services organisations. As in the previous edition, the author examines situations affecting different populations: infants, children, the elderly and disabled adults.

Tchernonog, Viviane. 1991. *Gestion des politiques sociales locales – Analyse du recours communal aux associations*. [Management of local social politics: analysis of community recourse to associations]. Commissariat Général du Plan – Laboratoire d'Économie sociale.

The main purpose of this study, requested by the Commissariat Général du Plan, is to examine the extent to which municipalities use nonprofit organisations to fulfil their missions in the field of social policy. The report evaluates the importance, evolution, forms and functions of municipalities' use of associations, using information collected through interviews and a mail survey. Tchernonog shows that rather than a simple confrontation between two rising actors (associations and local communities), the phenomenon is the result both a collective desire to develop local democracy and the necessity of finding solutions to inefficient municipal management.

## 5. Financing

Barzic, J.G. et J.C. Delnatte, J. Grolier, J.P. Hardy, M. Laurier. 1995. *analyse et gestion financières des établissements sanitaires et sociaux privés*. [Analyses and financial management of private health and social institutions]. Rennes: École nationale de la santé publique.

This volume presents principles of financial analysis and medium to long term management for private social and health care institutions. The authors offer pro-

fessional expertise and management tools tested in the for-profit sector, to those responsible for social and health care institutions in the nonprofit sector.

Foucauld, Jean-Baptiste de, Jean-Francois Chadelat et Catherine Zaidman. 1995. *Le financement de la protection sociale*. Commissariat général du plan (CGP), Paris: La Documentation Française.

Gazier, Bernard. 1993. “L'économie sociale dans l'économie mixte aujourd'hui”. [The social economy in the mixed economy today]. *Revue des études coopératives, mutualistes et associatives*, Vol. 72, No. 247 (44-45), pp. 174-182.

Gazier's article attempts to understand both the microeconomics (analysis in terms of individual agents) and macroeconomics (analysis in terms of global economic variables) of the social economy. In addition, he also discusses the economy of organisation – analysis in terms of systems. In this he discusses the role of the state, the market and nonprofit organisations in the social economy.

Tchernonog, Viviane. 1994. « Decentralisation and privatisation of social services in France », in *Local Economic and Employment Development*, 19, Private sector involvement in the delivery of social welfare services, OECD, pp. 81-105.

Tchernonog, Viviane. 1995. “Associations et financements publique”. [Associations and public financing]. *Revue des études coopératives mutualistes et associatives*, Vol. 74, No. 258 (56), pp. 17-29.

In this article Tchernonog presents findings concerning the distribution of public funding of various kinds – subsidies, reimbursements and purchasing services – to nonprofit organisations of different kinds. She finds that while nonprofit organisations play a pivotal role at the local level, public funding is marginal for many for most while being primarily channelled into a small number of nonprofits. More than half of public funding on nonprofits goes to those involved in social services and health care.

## 6. Staff and volunteers

Archambault, Edith and Judith Boumendil. 1997. *Enquête sur le don et le bénévolat en France – 1997*. [Donations and voluntary work in France]. LES-ISL-Fondation de France.

In the third edition of this report, published regularly by the Fondation de France since 1991, Archambault and Boumendil present the extent and nature of donations and voluntary work in France. They provide a breakdown by domain of activity, presenting figures on the social services sector which in 1996 received 14.9% of all donations and employed 14.4% of all voluntary workers.

Chadeau, Ann and Jean-Charles Willard. 1985. "Les forms et la mesure de l'emploi dans l'économie sociale". [Forms and measure of employment in the social economy]. *Revue des études coopératives*, No. 15, 3rd Trim. p. 65-89.

Chadeau and Willard study whether third sector organisations have a specific capacity to create employment. They enquire into both quantitative and qualitative aspects of the social economy in this respect.

Ferrand-Bechman, Dan. 1992. *Bénévolat et solidarité*. [Voluntary work and solidarity]. Syros Alternative: Paris.

Ferrand-Bechman offers essays, thoughts and social analysis on many aspects of the phenomenon of voluntary work – its characteristics, dimensions, motivations, relationship with the welfare state, voluntary workers outside France, and relation to paid work and dissidence. The work considers these aspects in relation to many elements of general import within the French social context.

Halba, Bénédicte et Michel Le Net. 1997. *Bénévolat et volontariat dans la vie économique, sociale et politique*. [Voluntary work and the voluntary worker in economic, social and political life]. Paris: La Documentation Française.

This work provides a precise description of voluntary workers in France and answers basic questions concerning their economic weight and motivations, and of public attitudes toward altruism and nonprofit organisations more generally. It demonstrates that voluntary workers and their growing weight in economic, social and political life are a barometer of social ethics and a reflection of the dynamism of collective work for social progress which challenges the image of the individualist society. Among the nine million voluntary workers in France are those working in the social services, who are included in this work alongside those working in health, sports and leisure, culture and education, humanitarian aid and the environment.

Ridder, G. de. 2000. "Les professions sociales en France: du modèle de la qualification au modèle de la compétence?" [The social professions in France: from the qualification model to the competence model?]. *European Journal of Social Work*, Vol. 3, Issue 2 July, pp. 139-150.

Ridder observes that in newer areas of social service activity such as 'insertion' (social integration) and mediation, employment is increasingly following a skills-management model which privileges individual aptitudes, varied professional experience and conformity to organisational objectives rather than the professional qualifications of potential staff. He asks whether this model will increasingly overcome the 'qualifications model' used in traditional social services sectors as their fields of activity widen into fields such as accommodation and home help. Ridder warns that with two different employment models, the social professions may be in danger of diverging into various subsectors with different operational logics. He suggests that the professionalism of social

workers must rise above potential antagonism between them which may ensue.

## 7. Clients, users and consumer issues

Specific groups of social service users or clients discussed in publications cited in Part C. of this bibliography fall into this category. In addition are works on relationships between social service personnel and their clients, and the rights and roles of service users in social service establishments, as in the following two publications.

Djaoui, E. 1997. "Quand évaluation se confond avec action. La rencontre singulière entre le travailleur social et son client". [When performance cannot be evaluated. The unique relationship between the social worker and the client]. *Informations sociales*, No.57, pp.79-86.

In this article the author responds to a series of questions concerning the dynamics between client evaluation and social action and presents a psychosocial approach to dealing with difficulties arising from them. Djaoui thus discusses the complexity of dimensions which social workers must take into account when evaluating clients, such as perceptions of the person, measures of the effects of intervention on the client, and the image which the social workers wish to present to other partners.

Matho, Yves-Alain et Roland Janvier. 1999. *Mettre en œuvre le droit des usagers dans les établissements d'action sociale*. [Implementing user rights in social action institutions]. Montrouge: Dunod.

Janvier and Matho discuss user rights in social action institutions, from the terms used to depict clients and ways of managing conflicts with personnel, to respect for client privacy and confidentiality. They also discuss pertinent issues such as the competency and qualifications of professionals, the transparency and accountability of social service institutions, and client involvement in disciplinary action against personnel.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Dutrenit, Jean-Marc. 1989. *Gestion et évaluation des services sociaux*. [Management and evaluation of social services]. Paris: Economica.

In this publication on the management and evaluation of social services Dutrenit begins by tracing the history of theories of social assistance. He then presents four types of effects which assistance may have on the social status of a group. With

these effects in mind the author reinterprets theories of social assistance, which for example may privilege certain types of effects over others. He then discusses methods of evaluating the effects of various types of assistance. It begins with a description of the social integration (cultural, normative, communicative and functional) of the client. Secondly it measures the intensity of social service actions, through a description of types of action. Thirdly, it offers a cost/benefit analysis of the group of social assistance options available. Empirical material is presented to demonstrate this evaluation method.

Dutrenit, Jean-Marc. 1994. *Evaluer un centre social*. [To evaluate a social centre]. Paris: L'Harmattan.

Dutrenit draws on field experience to explain how to evaluate a social centre. Methods, examples and results alternate with detailed thought on the different aspects of social work, which touches about one million adults and children in France every year.

Dutrenit, Jean-Marc. 1997. "Le chaînon manquant de l'efficacité. Retrouver une compétence sociale". [The missing link of efficiency. Rediscovering competence in welfare]. *Informations sociales*, No.57, pp.104-112.

Dutrenit analyses the difficulties, particularly ethical, of determining methods of evaluating a person's capacities, competency and limits in order to effectively deliver social services. He then presents a method of evaluating and reconstructing users' capacities. He emphasises that it is necessary to study, with the user, which treatment is appropriate given that a plurality of interpretations is possible.

Fenet, Francine. 1996. "La solidarité comme fondement de la protection sociale". [Solidarity as the foundation of social protection]. *Revue des études coopératives, mutualistes et associatives*, 58.

Addressing the inequality characterising the social protection system, the author defends a reform of distribution methods and a redefinition of the role of various actors in order to correct inequality. nonprofit organisations play an important role, occupying a particular position between social rights beneficiaries and the social protection system which must be balanced, but to do so they must be equipped with sufficient means.

Lambert, Denis-Clair. 1990. *L'Etat Providence en question*. [The welfare state in question]. Paris, Economica.

The experiences of the United States and Europe both raise two questions concerning equity and effectiveness in social welfare provision which this work addresses: has the redistribution of revenues reduced unemployment and poverty? Have public enterprises and private sector aid sustained growth and modernisation? The retreat of interventionism and social protection in the East, as in the West, is a long and difficult adaptation. The author takes a close look at social

security and economic interventions founded on a hierarchy of risks and the re-establishment of competition.

Miramon, J.M. 1996. *Manager le changement dans l'action sociale*. [Managing change in social action]. Rennes: École nationale de la santé publique.

Writing for both associations and institutions of social action, the author defines strategies for reliable management and clarifies the roles of presidents and directors. Miramon discusses the dynamics of organisational evolution and change and offers practical ways of dealing with such change.

## 9. Patterns of relations among providers

Alix, Nicole. 1993. « Associations sanitaires et sociales et pouvoirs publics: l'impact de la construction communautaire sur leurs relations en matière de gestion d'établissements et services sociaux ». [Health and social associations and public authorities: the impact of EU construction on social service management]. *Revue des études coopératives, mutualistes et associatives*, Vol 71, No. 47 (249).

In this article Alix discusses the impact of the formation of the EU on forms of cooperation between associations and public authorities, in financing and managing health and social service activities. He first describes the importance of third-sector organisations and their relations with national authorities in France and other EU countries. He then discusses the impact of EU law and the necessity of recognising the value of nonprofit organisations – the specificities of nonprofit management of social services, and the risks and needs for regulations to prevent the nonprofit organisations from being assimilated into either the market or the public sector and losing their special qualities such as solidarity and benevolence.

Archambault, Edith. 1994. « La gestion privée des services sociaux: production publique déguisée ou partenariat innovant ». [Private management of social services: innovative or disguised public production]. Colloque de l'association d'Économie politique; Repenser l'économie: de la redistribution à la réciprocité, Montréal.

Ullman, Clare F. 1998. *The welfare state's other crises: Explaining the new partnership between nonprofit organizations and the state in France*. Bloomington and Indianapolis: Indiana University Press.

Ullman explores the growing role of nonprofit organisations in the provision of social services in France over the past few decades. She contends that rather than being simply an outcome of a fiscal crisis of the welfare state, nonprofits' growing role can also be explained by the welfare state's « crisis of methods, of competence, and of definition ». Her study describes the political and ideological ori-

gins of the initiatives that led to the new roles of nonprofit organisations, as principally motivated by a desire to in fact increase state capacity to achieve progressive social goals.

Tymen, Jacques et Henry Nogues. 1988. *Action Sociale et decentralisation: tendances et prospectives* [Social Action and decentralisation: trends and prospective]. Paris: L'Harmattan.

This study, commissioned by the French government six years after the Decentralisation Acts came into effect, examines the social services system before and after decentralisation and analyses the political and economic consequences of the reforms. The authors describe and offer theoretical reflections on the regulations and redistribution of responsibilities for social services, and on the dynamics, strategies, conflicts and alliances among different actors regarding the institutional, financial and social basis of the system. The volume, significant for its time, argued that the future of the social services depends largely on the place and role of local partners.

## 10. Innovation and change

Cette, G., P. Heritier and V. Singer 1996. "Services de proximité et nouvelle croissance". [Neighborhood services and renewed growth]. *Revue des études coopératives mutualistes et associatives*, Vol. 75, No. 262(60), pp.24-34.

In this article the authors focus on 'neighbourhood services' as new enterprises that respond to unfulfilled needs that could become the basis for renewed growth within a climate of unemployment. They describe the current emphasis on neighborhood services arising from a concern for "shifting the composition of household consumption towards goods and services that involve higher levels of domestic jobs". They stress the need for incentives for such services to grow. They emphasise incentives on the demand side (aid to consumers) rather than on the supply side (subsidies to providers) in order to reduce interference with market rules. They emphasise the benefits of a recently established 'service check' scheme to simplify the use of home-care services.

Demoustier, Danièle. 1998. "Des structures diversifiées à la croisée des chemins". [Diversified structures at the crossroads]. Pp. 41-72 in Defourny, Jacques, Louis Favreau, and Jean-Louis Laville (Eds.), *Insertion et nouvelle économie sociale: Un bilan international*. Paris: Desclée de Brouwer.

Demoustier discusses various structures and measures for promoting integration into the labour market in France. He describes the history and growing role of nonprofit organisations as well as other enterprises of various forms, and the contradictions and successes they face in promoting the right to work. This chapter comprises part of a nine country study which demonstrates that economic or

employment integration is largely the work of the new generation of associations and co-operatives which can be considered an expression of a new social economy. The book concludes with reflections and hypothesis on the future of economic integration.

Laville, Jean-Louis 1991. "Les nouveaux services de proximité: Prolongements et ruptures par rapport à l'économie sociale". [New personal social services: continuities and change in relation to the social economy]. *Revue des études coopératives mutualistes et associatives*, Vol. 71, No. 39(242), p.100-109.

Laville discusses the evolution of new local social services in reaction to new or rising social needs, in particular to deal with unemployment, as micro-collectives which revitalise the original project of the social economy and strengthen solidarity. He discusses different forms which they take in different countries. The author examines the convergence and divergence between local social services and organisations of the pre-existing social economy, in order to better understand the proliferation of forms of solidarity today and their relation to historical characteristics of the social economy.

Rosanvallon, Pierre. 1998. *La nouvelle question sociale. Repenser l'Etat-providence*. [The new social question: rethinking the welfare state]. Paris: Seuil.

In this volume, Rosanvallon shows that a fundamental practical and philosophical justification for traditional welfare policies – that all citizens share equal risk – has been undermined by social and intellectual change. He begins by tracing the history of the welfare state and its founding premise that social risk is equally distributed and predictable. He then shows that due to economic diversification, some individuals in fact face greater risk than others. If the goals of social solidarity and civic equality are to be achieved, he argues, social programmes must be radically rethought, in particular they need to be more narrowly targeted. Rosanvallon draws international examples, focusing particularly on France and the United States to show how social programmes could better reflect individual needs.

## 11. European Union and globalisation issues

Castro, S. et J. Rivero, B. Enjolras. 1993. "Qu'est-ce qui fait courir les associations sanitaires et sociales?" [Who runs health and social service organisations?]. *Union Sociale*, No. 59, April, pp.4-20.

Castro, Rivero and Enjolras discuss the consequences of European Union law for national law. This important issue is addressed with particular reference to organisations working in the health and social service sectors. The authors ask to what degree such organisations are affected by EU law.

Coursin, Francois. 1993. "La politique européen de concurrence et les entreprises de l'économie sociale". [European competition politics and social economy companies]. *Revue des études coopératives mutualistes et associatives*, Vol. 72, No. 47 (249), p.58-72.

In this article Coursin examines the need for EU market regulations to take into account the specificity of companies in the social economy. The author argues that these establishments must be considered full-fledged economic actors with their own specific type of organisation, in order to preserve their competitiveness within the broader market. In this light, Coursin reviews EU provisions concerning competition and the obligations of companies and member countries. He concludes that adjustments to the Treaty of Rome, which was not created with social economy organisations in mind, are necessary.

Majnoni d'intignano, Béatrice. 1997. *La protection sociale*. [Social protection]. Paris: La Découverte.

Returning to the historical origins of the welfare state and its operation, this comparative work looks at types of coverage for sickness, old age, unemployment and social exclusion. The author examines the social systems in England, Germany and France, and questions their respective effectiveness and evolution in light of European integration and global competition. This new edition analyses recent reforms in France and abroad, and presents original thought on how to adapt social politics in a Europe with fewer children and diminishing professional activity among people aged 25 to 55.

Ministère de l'Emploi et de la Solidarité. 1999. *La protection sociale dans les pays de l'Union européenne: Chiffres-repères 1998*. [Social protection in the EU, 1998]. Paris: La Documentation Française.

The objective of this volume is to provide a public base of homogenous information on social protection systems in Europe. More than a quarter of the wealth produced in the EU is committed to social protection. This average hides important disparities across countries, from 18.6% in Portugal to 35.1% in Sweden. The age of social protection systems and the level of economic development explain a large part of these differences. The greatest proportion of expenditure goes to the elderly, which represent 30 to 40 percent of social expenditures in the majority of EU countries, while health constitutes the second greatest expenditure. In relation to the 1995 edition, this work takes into account the enlargement of the EU and the integration of the three new members: Austria, Finland and Sweden.

## 12. Bureaucratisation and/or commercialisation problems

Chauvière, Michel. 1997. « Quand le marché hante le social ». [When the market haunts the social]. *Les cahiers de l'ACTIF: la marchandisation du social*, 254, PP 5-18.

Dutrenit, Jean-Marc. 1997. *La compétence sociale. Diagnostic et développement*. [Social competence: diagnosis and development]. Paris: L'Harmattan.

Dutrenit discusses how many people without professional qualifications are rapidly gaining employment while those with qualifications remain unemployed. He describes 'social competence' as the important bundle of qualities which makes the difference between employment and unemployment. Social work has succeeded in developing this type of competence in residential services for clients. Dutrenit provides a definition of social competence and an interactionist perspective, as well as ways of developing social competence.

Fino-dhers, Aline. 1994. *Assistante sociale. Un métier entre indétermination et technicité*. [The social worker: a profession between indetermination and technicalities]. Paris: L'Harmattan.

The author describes the transformation of social work which in the 1970s valued social qualities in its agents. The professional body of social work being fractured, this book takes a socio-historical approach to show the progressive re-composition of professional competence in this field, the efforts of different professional actors to preserve their professionalism, and strategies of legitimisation.

Glennerster, Howard et Le Grand, Julian. 1995. « Le développement des quasi-marchés dans la protection sociale ». [The development of quasi-markets in social protection]. *Revue française d'économie*, pp. 111-135.

## 13. Comparative, cross-national issues

Coursin, Francois. 1993. "La politique européen de concurrence et les entrepris de l'économie sociale". [European politics of competition and the enterprises of the social economy]. *Revue des études coopératives, mutualistes et associatives*, no. 47, 3<sup>rd</sup> Trim. p.58-72.

In this article Coursin examines the need for EU market regulations to take into account the specificity of companies in the social economy. The author argues that these establishments must be considered full-fledged economic actors with their own specific type of organisation, in order to preserve their competitiveness within the broader market. In this light, Coursin reviews EU provisions concerning competition and the obligations of companies and member countries. He

concludes that adjustments to the Treaty of Rome, which was not created with social economy organisations in mind, are necessary.

Hebberecht, Patrick, et Fritz Sack (Eds.). 1997. *La prévention de la délinquance en europe*. [Preventing youth delinquency in Europe]. Nouvelles stratégies. Paris: L'Harmattan.

In the 1980s many European countries developed a new discourse, new practices and structures in the field of crime prevention. This work reveals the diversity of crime prevention models, their evolution, the importance that they take every day at the local level, the effort to integrate the work of different participants (justice, police, state and local administration, social work, the nonprofit and private sectors, etc.), programme content, relations with research, and the pressure of security preoccupations. National reports on seven countries including France are presented.

Joël, Marie-Eve, Elisabeth Cozette et Béatrice Guillebaud. *La protection sociale des personnes âgées dépendantes en France*. [Social protection for dependency in old age]. Leuven: Katholieke Universiteit Leuven. Hoger Instituut voor de Arbeid, 1999.

This national report on the situation of dependent elderly people in France is part of a series covering the 15 EU member states and Norway, edited by Jozef Pacolet & Ria Bouten.

OECD. December 1998. Children and families at risk: new issues in integrating services. OECD Studies: Social Issues.

This publication by the OECD on the growing problem of social exclusion contains country reports by France, Canada, Finland, Germany, the Netherlands, Spain, the UK and the USA. It presents the problems facing young children, students and families at risk, as well as preventative, client-oriented, community-based approaches involving, above all, improved co-ordination of services.

## 14. Current trends and policy issues

Enjolras, Bernard. 1998. "Economie sociale et transformation de l'Etat providence: le case des services aux personnes." [The social economy and the transformation of the welfare state: the case of social services for the elderly]. *Revue des études coopératives, mutualistes et associatives*, Vol. 77, No. 269, 3rd Trim., pp. 55-67.

After considering various factors contributing to welfare state crisis, Enjolras examines the role that the social-economy sector could play to compensate for the welfare state's inability to respond to new and differentiated social needs – taking the case of services for the elderly. He discusses how the increasingly

'mixed' economy of social service providers arises in two groups of countries: those in which the market has created pluralisation and is developing regulation based on competition among both profit and nonprofit providers (France, Britain, Spain and Quebec), and those in which a new form of subsidiarity is emerging in partnerships between the state and nonprofit organisations (Italy and Belgium). Enjolras argues that the nonprofit sector, to play its role fully in these transformations, must have both public support and room for initiative.

Ridder, Guido de (Ed.). 1997. *Les nouvelles frontières de l'intervention sociale*, Collection « Logiques sociales ». [New frontiers of social intervention]. L'Harmattan.

This edited collection considers the profound transformation of public politics in the social domain. Contributors discuss a series of themes: 1. The crumbling of the 'salaried society' and increasing vulnerability; 2. The forces that shape social choices; 3. The accelerated evolution of social services and the development of new demands and needs; and 4. The impact of new models of work looking comparatively at France, other European countries and North America.

Roustant, Guy; Laville, Jean-Louis; Eme, Bernard; Mothé, Daniel et Perret, Bernard 1996. *Vers un nouveau contrat social*. [Toward a new social contract]. Paris, Desclée de Brouwer.

This collection addresses the absence of effective programmes to combat unemployment, social exclusion, the crisis of growth, violence and isolation – all significant topics in society today. It discusses the urgency of taking appropriate measures and developing a new approach to the social economy and politics.

## C. Special Fields

### Child and Youth Welfare

Enjolras, Bernard. 1994. *Services de proximité: politiques sociales et création d'emplois, le cas de l'aide aux personnes âgées et de l'accueil de la petite enfance*. [Personal social services: social politics and job creation, the case of aid to the elderly and infants]. Paris: Université Paris I, thèse.

Enjolras considers the relationship between the emergence of "services de proximité", or local social services, nonprofit organisations, and public politics. In particular he analyses three aspects within the fields of services for the elderly and for children: the dynamic of the development of these services; what the role of public authorities should be; and the potential for job employment.

Lhuillier, Jean-Marc. 2000. *Guide de l'aide sociale à l'enfance: droit et pratiques*. [Guide to social services for children: law and practice]. 5<sup>e</sup> édit., Berger-Levrault. The fifth edition of this publication on social services for children includes a new

discussion of recent measures of the penal code concerning the prevention of sexual crimes, the protection of minors, and directives concerning adoption – in particular international adoptions. The presentation and analysis addresses the responsibility of services and of social service personnel, and thus is useful for social workers. It is also helpful for social service users, whose rights are discussed.

Sans, Pierre. 1997. *Le placement familial. Ses secrets et ses paradoxes – étude anthropologique, sociologique, politique, psychopathologique et institutionnelle*. [Family placement: secrets and paradoxes – an anthropological, sociological, political, psychological and institutional study]. Paris: L'Harmattan. This work presents a synthesis of ideas about family placement and how it functions, based on the author's long experience and research in the field. After describing the situation in France, Sans draws on clinical cases and testimonies and provide evidence to support his theoretical reflections.

Verdier, Pierre. 1997. *L'enfant en miettes. L'aide sociale à l'enfance: bilan et perspectives*. [Children in pieces. Social services for children: review and perspectives]. 4e éd. Paris: Dunod. In the fourth edition of this book Verdier analyses the legislation, ideology and practice of social services for children. The book offers a thorough overview, ending with a chapter on the rights of children.

## Family services

Bin-heng, Mary, Framboise Cherbit et Edith Lombardi. 1996. *Traiter la violence conjugale. Parcours pour une alternative*. [Treating conjugal violence: toward an alternative]. Paris: L'Harmattan.

For women facing the grave violence and humiliation of domestic violence, leaving isolation and overcoming fear and shame is difficult. This book discusses meetings between advisers, professionals at women's shelters, and battered women, describing the history of the development of support for battered women in France.

OECD. December 1998. *Children and families at risk: new issues in integrating services*. OECD Studies: Social Issues.

This publication by the OECD on the growing problem of social exclusion contains country reports by France, Canada, Finland, Germany, the Netherlands, Spain, the UK and the USA. The problems facing young children, students and families at risk are discussed and preventative, client-oriented, community-based approaches involving, above all, improved co-ordination of services are presented.

Pedersen, Susan. 1993. *Family, dependence, and the origins of the welfare state: Britain and France, 1914-1945*. Cambridge: Cambridge University Press.

Pederson explores the historical development of family policy and family services in both Britain and France between 1914 and 1945. She argues that in both countries the a crisis of family relations and gender roles inspired and underlined the development of the welfare state, as did the rise of class politics. These origins continue to shape welfare states today.

## The elderly, nursing homes, long-term care

Enjolras, Bernard.1992. « Services de proximité dans l'action sociale: l'apport de la théorie du choix institutionnel ». [Personal social services and social action: contribution of the theory of institutional choice]. *Revue des études coopératives, mutualistes et associatives*, Vol. 71, No. 44-45.

Enjolras examines the concept and practice of local social services in light of the theory of institutional choice. He first discusses the characteristics and definitions of “services de proximité, which encompass a diverse range of social services, distinguishing the concept from concepts such as “services aux personnes” (personal social services) and “emplois familiaux” (family employment) in social service provision. He then looks at the examples of home care for the elderly and services for children within the mixed economy of welfare.

Enjolras, Bernard.1994. *Services de proximité: politiques sociales et création d'emplois, le cas de l'aide aux personnes âgées et de l'accueil de la petite enfance*. [Personal social services: social politics and job creation, the case of aid to the elderly and children]. Paris: Université Paris I, thèse.

Enjolras considers the relationship between the emergence of “services de proximité”, or local social services, nonprofit organisations, and public politics. In particular he analyses three aspects within the fields of services for the elderly and for children: the dynamic of the development of these services; what the role of public authorities should be; and the potential for job employment.

Joël, Marie-Eve et Claude Martin. 1998. *Aider les personnes âgées dépendantes: arbitrages économiques et familiaux*. [Helping elderly dependent people: economic and family arbitration]. Rennes: ENSP.

In order to understand the social welfare needs of the elderly, these authors take into account relations of dependence, or the structure of aid. The study and approach which Joël, and Martin present goes beyond the general tendency to focus only on level of handicap or incapacity of the elderly when evaluating their needs.

## Health care related social services, convalescence and rehabilitation

1991. *L'intervention sociale face au Sida*. [Social intervention and AIDS]. Paris: Arcat-Sida.

This is a practical guide intended to introduce, inform, counsel and accompany AIDS-positive people in the use of social services.

Cresson, Geneviève. 1995. *Le travail domestique de santé*. [Home health care]. Paris: L'Harmattan.

Many health problems and serious conditions are treated by family members and close friends, often women, in their own homes rather than by professionals in institutions. The research presented here explores the diverse facets of domestic health work, which is too often ignored, undervalued or trivialised. It is based on discussions with some forty families from the North of France.

Montagnier, Luc. 1994. *Le Sida et la société française, décembre 1993*. [AIDS and French society]. Paris: Documentation Française.

## Handicapped

Hermange, Camille et Triomphe, Annie. 1996. *Personnes handicapées – droits et démarches*. [The handicapped: rights and approaches]. Centre Technique National d'Etudes et de Recherches sur les Handicaps et les Inadaptations.

Ramaré, Anne. 1996. « L'insertion professionnelle des personnes handicapées: les enjeux d'une loi ». [Professional integration of the handicapped: the stakes of the law]. Données sociale. L'Institut national de la statistique et des études économiques.

Ravaud, Jean-François et Fardeau, Michel. 1994. *Insertion sociale des personnes handicapées: méthodologies d'évaluation*. [Social integration of the handicapped: methodologies of evaluation]. Centre Technique National d'Etudes et de Recherches sur les Handicaps et les Inadaptations.

Stiker, Henri-Jacques. 1998. *Corps infirmes et sociétés*. [The disabled and society]. DUNOD.

Stiker offers an historical and anthropological study of approaches to dealing with disability in society. From biblical origins to the law of 1975, the author discusses and sheds light on the problems of disability and social integration, which now constitutes an important priority for social action in France.

Triomphe, Annie. 1995. *Les personnes handicapées en France: données sociales*. [Handicapped people in France: social facts]. Centre Technique National d'Etudes et de Recherches sur les Handicaps et les Inadaptations.

## Homeless, the poor, poverty

Anthonioz-de Gaulle, Geneviève 1995. *Evaluation des politiques publiques de lutte contre la grande pauvreté*. [Evaluation of the public politics of the fight against poverty]. Avis du Conseil économique et social, Journal Officiel, No.3.

Bertaux, Roger 1994. *Pauvres et marginaux dans la société française*. [The poor and marginalised in French society]. Paris: L'Harmattan.  
Bertaux attempts to surpass the reductionist character of common reasons given for dealing with the poor and marginalised in society (such as humanitarian aid versus state imposition), and to find the appropriate tools of analysis for understanding the complexity of different styles of administering to them.

Fragonnard, Bertrand et Hélyne Strohl. 1993. *Cohésion sociale et Prévention de l'exclusion*. [Social cohesion and the prevention of exclusion]. Rapport au Commissariat général au plan, Paris: La Documentation Française.

Nasse, Philippe et Hélyne Strohl, Martine Xiberras. 1992. *Exclus et Exclusions: Rapport du groupe technique, Commissariat général au plan*. [The excluded and exclusions]. Paris: La Documentation Française.

Paugam, Serge. 1993. *La Société française et ses pauvres, l'expérience du Revenu Minimum d'Insertion*. [French society and the poor: the experience of RMI]. Paris: PUF.

## Unemployed

AGEFIPH. 1997. *Emploi et handicap. Déjà 10 ans . . .* [Employment and handicap: Ten years after . . .]. Paris: L'Harmattan.

On 10 July 1987 the French parliament voted in favour of a law to support the professional integration of handicapped people. AGEFIPH, a nonprofit organisation supporting disabled people's rights, provides a retrospective analysis of the strategy that emerged, the ways it is mobilised, and the results. This reflection sheds light on the development of a mechanism unique in its field, and proposes paths for farther evolution in the future.

Barale, Florence, Antoine-Tristan Mocilnikar et Robert Castel 1997. *Chômage, le cas français*. [Unemployment: the French case]. Commissariat général du Plan, Paris: La Documentation Française.

In this collaborative work the authors examine whether there is a specific nature to the French experience of unemployment, what its real scale is and what its consequences are.

Demoustier, Danièle. 1998. "Des structures diversifiées à la croisée des chemins". [Diversified structures at the crossroads]. Pp 41-72 in Defourny, Jacques, Favreau, Louis, and Laville, Jean-Louis (eds.), *Insertion et nouvelle économie sociale: Un bilan international*. Paris: Desclée de Brouwer.

Demoustier discusses the various structures and measures to promote integration into the labour market in France. He describes the history and growing role of nonprofit organisations as well as other enterprises of various forms, and the contradictions and successes they face in promoting the right to work. This chapter comprises part of a nine country study which demonstrates that economic or employment integration is largely the work of the new generation of associations and co-operatives which can be considered an expression of a new social economy. The book concludes with reflections and hypothesis on the future of economic integration.

Rifai, N. 1996. *Le chômage et le chômeur de longue durée. Les médiateurs de l'emploi à l'épreuve des faits*. [Unemployment and the long term unemployed: employment mediators to the test]. Paris: L'Harmattan.

Parallel to the development of unemployment in France has been the emergence and multiplication of mechanisms, structures and actors to deal with it. This book analyses the images and practices of people dealing with the long-term unemployed, and shows how and why unemployment remains difficult to resolve.

## Immigrants and refugees

Roux, Suzanne (Ed.). 1997. *Action sociale et migration – Expériences et méthode d'un service social spécialisé*. [Social action and migration: experiences and method of a social service specialist]. L'Harmattan.

This work on social action and migration describes the functioning of an association specialising in services for immigrants: Social Service to Aid Immigrants (SSAE). It exposes the methods and strategies of a "social service specialist without frontiers", which works in both national and international political and juridical contexts.

Poiret, Cristian. 1996. *Familles africaines en France*. [African families in France]. Paris: L'Harmattan / CIEMI.

Drawing on a collection of case studies, Poiret responds to questions regularly posed by politicians, teachers and social service professionals who work with families from sub-Saharan Africa. Theoretical and conceptual tools are also provided which enhance an interpretation of the evolution of French society in terms of ethnic social relations rather than simply relations between the sexes and classes.

## **D. Summary assessment of current debates in the field**

Among the many ongoing and new debates on social services and the welfare state in France, several are prominent. The first concerns the distribution of responsibility between state and nonstate providers. The decentralisation trend so eminent since the early 1980s continues, with central government having reinforced commitment toward its promotion. However, this commitment must encompass provision of the necessary means or financial support, which not all are confident will continue to be supplied, rather than simply a shifting of responsibility. Second, parallel to decentralisation is support for the continuing growth of "services de proximité", services provided locally and in home care, primarily by nonprofit organisations. Both the numbers and types of services or social needs addressed is likely to continue to increase in the future, but as increasingly observed, local development must be accompanied by greater regional equilibrium. Third, like other European countries the ageing population in France is increasing demand for services and raising important questions and concerns about the financing and quality of service provision in the future. Fourth, the emphasis on "insertion", or social and economic integration into society, is receiving increasing attention and resulting in the growth of new services for marginalised or excluded populations. Fifth, spanning these issues are rising concerns about quality of services generally and their provision, with increasing need for research into this area. Sixth, an increasingly significant issue concerns how EU membership and globalisation will influence social needs and the national social service system, as well as concepts of social citizenship and equity – or the very basis of welfare rights – in the near future.

## Germany

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### A. Synopsis of the Social Service System

In Germany there is no coherent definition of the term “social service”. The following bibliography considers social services to be those direct personal or customised services delivered through “voluntary”, unpaid and non-professional services (informal social services) as well as those delivered by professional and paid employees in social services occupations (formal social service).

Social services are provided by formal, informal and intermediate institutions. The formal assistance sector encompasses those services provided either by the public sector or the market through profit-oriented institutions. The informal sector includes services provided on a voluntary or unpaid basis by the family, primary social networks (neighbours, friends and other relatives) and self-help groups. ‘Intermediate institutions’ or nonprofit organisations deliver by far the greatest share of social services. Among intermediate institutions a network of “local welfare organisations” dominate, delivering 60% of all services while public institutions contribute about 30% and private institutions contribute just under 10%.

Welfare organisations run 91,204 institutions with more than 3.2 million places across Germany, associated with nearly 35,000 self-help and support groups. They employ 3% of all officially employed individuals with 1.2 million full-time jobs, in addition to approximately 2.5 to 3 million jobs for voluntary workers. Social work includes work in advisory centres and residential services offered by 36,500 institutions. Since 1993 the number of institutions has increased by 13%, employment rose by 20% (about 180,000 new jobs) and the number part-time jobs increased disproportionately by 34%. These growth rates are mainly due to developments in the new federal states, where the capacity for care in welfare organisations doubled in the last three years. The number of institutions increased by more than 50% to 14,491, while the number of employees increased by two-thirds. Welfare organisations deliver 47% of all youth welfare services and over two-thirds of other social services such as advisory centres for education, youth and family issues (68%) and substance abuse (76%).

Social services are financed primarily by the federal states and local authorities, particularly for social benefits institutions and social insurance. Services are also financed through public payments, for example employment initiatives and community service, and through the private capital of non-profit organisations (i.e.

donations, inheritance). Public finance of social services can be organised in different ways, the traditional form being grants. Other forms include achievement-oriented payments, payment for social services costs, nursing and contracts with service deliverers. In the social budget of 1998, social services and assistance received 103,610 million DM. The economic value of voluntary work in welfare organisations is between two and three million DM.

The legal definition of social services is much less clear than that of the social security system. Individual social insurance (health insurance, pension insurance, unemployment insurance, long term care insurance) provides legal right to social services that offer payment in-kind for specific services. Other social services are not legally guaranteed at central government or state level. Under the subsidiary principle, federal and state governments do not have their own social service agencies; rather most municipalities pass the responsibility for provision onto independent agencies. According to legislation, local government must secure and co-ordinate the provision of social services, for example guaranteeing social assistance under federal legislation (*Bundessozialhilfegesetz*), youth welfare services, social advice, juvenile court assistance and mediation of adoptions. According to the *Landeskindergartengesetz* in each federal state, states must also provide adequate kindergarden places.

## **B. Annotated Bibliography**

### **1. Comprehensive works, overview volumes, classics on social services and the welfare system**

Bäcker, Gerhard and Rolf G. Heinze, Gerhard Naegele, Christoph Strünck, Mathias Bucksteg, Matthias Geiser, Sabine Kühnert, Bernhard Rosendahl. 1995. *Die Sozialen Dienste vor neuen Herausforderungen*. [New challenges for social services]. Münster: Lit Verlag.

Social services are under pressure to modernise. Processes of change affect demand and supply more significantly in the social services than in the social security system. On the demand side, demographic and social changes limit traditional family assistance while increasing the need for support. Quantitative and qualitative requirements for supplies rise with increasing prosperity and education level as well as with changing life experiences and life styles. Meanwhile, social service suppliers are affected by public financial bottlenecks and crises that force them to increasingly align their work with criteria of efficiency, effectiveness and quality. Long-term care insurance has introduced competition that will become fiercer amongst suppliers. And social services are less able to fall back on volunteer labour. This book analyses and critically evaluates the social, economic and political challenges of social services.

Tillmann, Berthold. 1990. "Das Elend des Bestehenden: zehn Thesen über den Zustand sozialer Dienstleistungen in der Bundesrepublik Deutschland." [The misery of current social services in Germany]. *Blätter der Wohlfahrtspflege: Deutsche Zeitschrift für Sozialarbeit* 137 (5): 123-124.

Tillmann sketches the structural problems of social services in ten theses. He critiques inadequacies in methodological issues (client-centred approaches splintering into individual problems, versus structural and holistic approaches) and organisational issues such as networking and co-operation. Regarding causes for problems of identity and value among social services institutions, the author points out: "From the perspective of local government the miserable situation of the existing system of local social services results less from a systematically insufficiently working and organised social administration and institutional organisation, than from variously interdependent complex processes and individual aspects which determine the organisation of social security in Germany in general."

Bäcker, Gerhard and Reinhard Bispinck, Reinhard Hofemann, Gerhard Naegele. 1989. *Sozialpolitik und soziale Lage in der Bundesrepublik Deutschland*. [Social policy and social status/social class in Germany]. Bd. 1 und Bd. 2, Köln: Bund-Verlag.

These volumes offer a fundamental presentation and analysis of current working and living conditions as well as socio-political measures and services in the federal republic of Germany. Comprehensive inventories provide an overview of developments in social policy and economic processes, income, employment, qualifications, health, children and families, age and social services. The authors present and evaluate the fundamental principles, services, institutions and effects of social policy, concentrating on social problems and danger zones. Not only social insurance is studied, but also tariff policy, safety provisions, labour market policy, vocational training and further professional education, tax policy and local social policy. Current discussions and conflicts as well as fundamental shortcomings and erroneous developments are analysed and alternative approaches are discussed. Chapter IX in volume 2 provides a very good introduction to social services.

Olk, Thomas and Hans-Uwe Otto (ed). 1987. *Helfen im Sozialstaat*. [Assistance in the welfare state]. (Soziale Dienste im Wandel 1.) Neuwied: Luchterhand.

In light of the political, economic and social changes in the federal republic of Germany since the early 1980s, Olk and Otto redefine foundations, perspectives and forms of social work while critically appreciating historical lines of development. This provides a background for a discussion of changes in the institutionalisation of social services, in particular the effects of changing values and the tendency toward individualisation in social work and social pedagogy. Crucial topics in this volume are „value systems and social transformation“ and „the regulation of the social in the welfare state“.

Olk, Thomas and Hans-Uwe Otto (ed). 1989. *Lokale Sozialpolitik und Selbsthilfe*. [Local social policy and self-help]. (Soziale Dienste im Wandel 3.) Neuwied: Luchterhand.

This third volume by Olk and Otto builds on the general criticism of the institutional organisation of social policy and social work in volume one. The authors state that theoretical and practical consequences for a necessary reorientation of social services can be found in a productive discussion of new forms of local social policy and self-help. Several essays analyse developments and future perspectives within the formally organised system of local services production. Other essays focus on community self-help and altruistic support activities outside institutions.

Gross, Peter. 1983. *Die Verheißungen der Dienstleistungsgesellschaft: soziale Befreiung oder Sozialherrschaft?* [The promise of the service economy]. Opladen: Westdeutscher Verlag (zugl. Konstanz: Univ., Habil-Schr., 1979).

Gross focuses on customised services, their structure and dynamics and the causes and consequences of their disproportionate expansion in comparison to other activities. Following a survey of the problems of customised services, Part 1 deals with theories of the service society, the underlying definition of service, and basic economic issues. Part 2 considers the contribution of social sciences in clarifying the particular features of services for individuals. Part 3 discusses services for individuals in the context of social policy: treatment, advice, nursing and care. Part 4 considers trends in social services development, and asks to what degree the vision of the self-help community can replace that of the service society, at least in health policy, and how realistic such a vision may be.

## 2. Supply and demand of social services

Hegner, Friedhart. 1991. "Angebotsketten und verkettete Organisationsprinzipien der Versorgung: Perspektiven für die Gestaltung der Sozial- und Gesundheitsdienste in West- und Ostdeutschland". [Organisational principles of social service delivery]. Pp. 225-238 in Nippert, Reinhardt P., Pöhler, Willi and Slesina, Wolfgang. *Kritik und Engagement: Soziologie als Anwendungswissenschaft*. München: Oldenbourg.

In a schematic, simplified form, Hegner presents basic theoretical concepts behind welfare assistance and social security. The theoretical model 1) provides orientation for planning and organisation, chains of supply and actors at the local and regional level, and 2) provides key ideas that displace unrealistic dichotomies such as "state or market", "state or self-help" and "market or self-supply". To find suitable social service institutions and suppliers, two issues must be considered: the problems of those in need and the customised services offered; and the various tasks involved in the implementation of services. Several suitable

criteria can be identified from both issues in order to select an appropriate “welfare mix” of market, state and self-organisation.

Seeck, Dietmar. 1989. “Bedarfsprognosen und Bedarfsentwicklung in den sozialen Diensten” [Demand for social services]. Pp. 55-85 In Hanesch, Walter (ed). *Fachhochschule und Arbeitslosigkeit: Perspektiven für Arbeitsmarkt und Ausbildung in der sozialen Arbeit*. Weinheim: Juventa Verlag.

This paper evaluates and discusses prognoses and developments in demand for social services stemming from changing social and economic conditions. The author relates quantitative figures (on population structure and development, unemployment, available resources in the economy, the state and private households) to the structure and dynamic of values and associated behaviours, education levels and training, and the dynamism of technical progress. The analysis considers international political and economic conditions and liabilities as well as ecological and natural conditions.

Fink, Ulf (Ed). 1988. *Der neue Generationenvertrag: die Zukunft der sozialen Dienste*. [The new generation contract and social services]. München: Piper.

In twelve papers Fink discusses the future demographic problem of an ageing society with increasing social service needs. Amongst other issues, the author presents ideas about how to shape voluntary engagements, contracts between generations, and the social market economy in the future. Voluntary engagement in particular is considered of great importance. In conclusion Fink states that supply and demand in social services cannot be organised in market economic terms to a large extent.

Schäfer, Dieter. 1981. “Soziale Dienste – Angebot und Nachfrage.” [Social services: supply and demand]. Pp. 89-107 In Klages, Helmut and Merten, Detlef. *Sozialpolitik durch soziale Dienste: Vorträge des 17. Sonderseminars 1980 der Hochschule für Verwaltungswissenschaften Speyer*. Berlin: Duncker & Humblot.

The author attempts to design a theory of social services and the development of supply and demand. The systematic discussion considers the relation between social services and social security, analyses the difference between social and other needs and services, and offers a definition of social services.

### 3. Definition, forms and types of social services

Deimer, Klaus, Dieter Jaufmann and Martin Pfaff. 1987. “Komparative Evaluation sozialpolitischer Trägersysteme und Leistungsformen: ein Zwischenfazit”. [Comparative evaluation of organisational models for social policy delivery]. Pp. 255-272 in Kaufmann, Franz-Xaver. *Staat, intermediäre Instanzen und Selbsthilfe: Bedingungsanalysen sozialpolitischer Intervention*. München: Oldenbourg.

It is widely accepted that governmental social policy operating through the traditional vehicles of money, law, information and goods is deficient and needs to be improved. There are also other resources that are rarely supplied: affection, status and certain elements of customised services. This paper analyses the negotiation of these resources in state institutions, nonprofit organisations, voluntary social work and self-help networks.

Bauer, Rudolph. 1986. "Soziale Dienste in Gegenwart und Zukunft". [Social services today and in the future]. Pp. 43-70 in Oppl, Hubert and Tomaschek, Arnold (ed). *Modernisierungskrise und soziale Dienste: Chancen für gesellschaftlichen Stellenwert, Profession und Ausbildung*. Freiburg im Breisgau: Lambertus-Verlag.

Drawing on economic and socio-political findings, Bauer discusses what social services offer and historical changes in our understanding of social services. To better understand why social services developed, findings are presented concerning the logistical functioning of the welfare state. Four prognoses are offered concerning the future development of social services. The first and second respectively summarise existing ideas about the organised professional social sciences and about the family as a simple social service. The third predicts the development of a socio-industrial complex and corresponding markets resulting from the means of production in society. The fourth predicts the evolution of a philanthropic market to finance social services.

Krause, Peter. 1981. "Die Bestimmung des Inhalts von sozialen Dienst- und Sachleistungen". [On the purpose and content of service delivery]. Pp. 67-77 in Klages, Helmut and Merten, Detlef. *Sozialpolitik durch soziale Dienste: Vorträge des 17. Sonderseminars 1980 der Hochschule für Verwaltungswissenschaften Speyer*. Berlin: Duncker & Humblot.

Krause's paper is one in a collection of essays in an interdisciplinary study of current social policy and social services. The various papers discuss both theory and practice, from the influence of sociology on social policy, comparative analysis of social policy and socio-pedagogy, and philosophical reflection on the social nature of humans, to more current problems of social policy practice. Krause's paper examines contradictions between theory and practice when attempting to make social services and payments in-kind more concrete on a legal level, showing that their ends are rarely differentiated in a clear way. This problem increases as social services and payments in-kind are no longer purposeful but become means in themselves, for example in the fields of advice, education and nursing.

#### 4. Organisational aspects, forms, ownership, and auspices of the provider

Angerhausen, Susanne and Holger Backhaus-Maul, Claus Offe, Thomas Olk, Martina Schiebel. 1998. *Überholen ohne einzuholen: freie Wohlfahrtspflege in Ostdeutschland*. [On the establishment of free welfare associations in East Germany]. Opladen: Westdeutscher Verlag.

The first part of this study presents the system of social service production in the Federal Republic of Germany and the German Democratic Republic. Strategies of central government, local actors, national associations and professional organisations are revealed through regional case studies and organisational analyses. In the development of new structures in the new federal states, a specific mix of East German traditions and decisions related to the reunification has enabled East German welfare to overtake West German welfare at considerable speed, but at the risk of losing essential characteristics of free welfare support.

Anheier, Helmut K., Eckhard Priller, Wolfgang Seibel, Annette Zimmer (ed). 1997. *Der Dritte Sektor in Deutschland: Organisationen zwischen Staat und Markt im gesellschaftlichen Wandel*. [The Third Sector in Germany]. Berlin: Edition Sigma.

This international research project aims to systematically map the long neglected system of associations of clubs, organisations, trusts and foundations, caring institutions and independent agencies in the health sector, private welfare, voluntary engagement and donations. The authors describe the structure and social embeddedness of the Third Sector in Germany, and in particular study the situation in the new federal states. International comparisons with France and the US are offered, focusing on voluntary engagement and donations. The study concludes with ideas concerning the theoretical embeddedness of the „non-profit-sector“ and the future of the Third Sector in Germany.

Bauer, Rudolph. 1991. "Intermediäre Instanzen im Strukturwandel der Sozialpolitik: kommen intermediäre Hilfe- und Dienstleistungsorganisationen als Akteure des sozialpolitischen Strukturwandels in Frage oder sind sie Agenturen zu seiner Verhinderung?". [Intermediary organisations, change, and social policy]. *Österreichische Zeitschrift für Soziologie: Vierteljahresschrift der Österreichischen Gesellschaft für Soziologie*. 16 (1): 74-91.

Bauer clarifies what is meant by the term "intermediate organisation", defining all organisations within the field of social and health services, or the "intermediate assistance and service system" (IHDS). He reviews the classification of types of IHDS, such as social enterprises, social federations, social operations, registered associations and self-help groups. He then identifies intermediate organisations of the IHDS as possessing the following criteria relating to "intermediateness": non-profit character, voluntary nature, value orientation or having a philosophy. Finally he identifies the different tasks of intermediate organisations: social risk assistance, family assistance and support, health services, rehabilitation and assistance for the

disabled. These definitional distinctions provide a background for discussing how to evaluate intermediate organisations as socio-political actors.

Olk, Thomas and Rolf G. Heinze. 1989. "Selbsthilfe im Sozialsektor: Perspektiven der informellen und freiwilligen Produktion sozialer Dienstleistungen". [Selfhelp, informal and voluntary social service production]. Pp. 233-267. In Olk, Thomas and Hans-Uwe Otto (ed). *Lokale Sozialpolitik und Selbsthilfe*. Neuwied: Luchterhand.

Olk and Heinze analyse the achievement potential and limit of non-professional social services in the modern welfare state, in view of the present debate on redistributing responsibility between the market, state and community self-help. They examine the vagueness of the self-help category and propose a definition to facilitate analyses of voluntary social services. The category of non-professional social services sector is introduced to delimit the different contexts of individual voluntary support and to examine their structural features and directions of development. Theoretical and empirical findings concerning non-professional assistance potentials are presented.

Schuster, Franz and Bernhard Happe (ed). 1992. *Sozialpolitik und ihre Träger*. [Social policy and implementation]. Köln: Deutscher Gemeindeverlag.

The first section of this edited collection discusses debates on human dignity, the right to live, value orientation, family, migration, long-term unemployment and local social policy. In the second section selected areas of social policy are addressed: youth welfare legislation, all-day care, single parents, integration of the disabled, social assistance and old age assistance. Social services organisations and occupations are then discussed, including public health services, hospitals' guidance responsibility, current problems in social work occupations, new occupations in nursing, the youth welfare committee, and the co-operation of public and independent welfare and church welfare support.

Textor, Martin R. (ed). 1994. *Allgemeiner Sozialdienst: ein Handbuch für soziale Berufe*. [Social services: a handbook]. Weinheim: Beltz.

General social service, the basis of the German social system at the local level, addresses individual, interpersonal and material problems among citizens by rural district or free municipality. This central social service was founded in the 1920s as family welfare to ensure basic psychosocial welfare. This handbook introduces its most important tasks, fields and forms of work. It contains papers on the history, organisation and legal foundations of general social service and on different fields of work: informal care, educational advice, family issues and divorce, support for children and youths, legal assistance, health, economic and housing support for the elderly and the disabled, work with marginalised groups, and initiatives for immigrants of German origin from Eastern Europe.

## 5. Financing

Halfar, Bernd (ed). 1999. *Finanzierung sozialer Dienste und Einrichtungen*. [Financing social services]. Baden-Baden: Nomos-Verlags-Gesellschaft.

This comprehensive and topical study presents and examines the foundations of social services and institutions in unified Germany.

Hanesch, Walter. 1989. "Sozialpolitische Rahmenbedingungen und Beschäftigungsprognosen in der sozialen Arbeit". [Social policy and employment]. Pp. 87-105 in Hanesch, Walter (ed.). *Fachhochschule und Arbeitslosigkeit: Perspektiven für Arbeitsmarkt und Ausbildung in der sozialen Arbeit*. Weinheim: Juventa Verlag.

Hanesch analyses the conditions determining future employment in social work in order to show the basic socio-political conditions of social work. Hanesch discusses whether growing social services can be financed considering (1) the structural development of costs in social services, and (2) the current crisis in social budgets. The debate on financing is complemented by one on the controversy concerning the socio-political efficiency of social services.

Vieth, Willi. 1988. "Krise des Sozialstaats – Krise der Sozialarbeit?: Herausforderung durch veränderte Rahmenbedingungen." [Crisis of the welfare state]. *Soziale Arbeit: deutsche Zeitschrift für soziale und sozialverwandte Gebiete*. 35 (5): 184-189.

The ability to realise the ideal condition of the social state is dependent on resources (R. Herzog). The critical symptoms of an under-resourced system become most obvious at local government level. Social services expenses can no longer be financed, and social benefits are being retracted. While recalling the Federal law on social welfare assistance, a structural consolidation is unavoidable. The author considers particularly important the secondary position of social services in relation to social security, the subsidiary position of legal welfare, and the priority of personal support over payment in-cash and in-kind, all of which create immediate demands on social work.

Giese, Dieter. 1986. "Zur Finanzierung sozialer Dienste in Einrichtungen." [Financing of social services]. *Blätter der Wohlfahrtspflege: Deutsche Zeitschrift für Sozialarbeit*. 133 (5): 105-108.

The author discusses the term „social services“ and questions its meaning and position in social law.

Krause, Peter. 1985. "Die sozialen Dienste im System der Sozialversicherung, der sozialen Entschädigung und der Sozialhilfe." [Social services and social insurance]. *Zeitschrift für Sozialhilfe und Sozialgesetzbuch: Monatszeitschrift für Sozialrecht, Sozialgesetzbuch, Arbeitsrecht, Sozialhilfe, Wohlfahrtspflege, Jugendwohlfahrt und verwandte Gebiete*. 24 (8): 346, 348-357.

The author addresses the respective importance of social welfare, social compen-

sation and social security within the social services. By defining and labelling social services, aims and legal definitions, and describing ideal forms of social services work, Krause explains which individual services should be offered in which fields. Social services, their working methods, personnel and finance are aimed at target groups or purposes.

## 6. Staff and volunteers

Otto-Schindler, Martina. 1996. *Berufliche und ehrenamtliche Hilfe: Perspektiven der Zusammenarbeit; eine empirische Studie zu Bedingungen und Erfahrungen in der Sozialen Arbeit*. [Professional and voluntary work]. Osnabrück: Rasch (zugl. Osnabrück: Univ., Diss., 1995).

Social work lacks successful co-operation between professional and voluntary workers. A transparent distribution of tasks is needed to improve co-operation and self-reflection in social work. This study offers a theoretical and empirical discussion of professional, job related and voluntary activities. Diverse approaches to sociopedagogical actions are examined, beginning with the premise that professional and voluntary support are intertwined and need to find new ways of inter-relating in order to appropriately share activities.

Badelt, Christoph. 1990. "Unbezahlte Arbeit" in den Sozialen Diensten". [Unpaid work]. Pp. 107-124 in Heinze, Rolf G. and Offe, Claus (ed). *Formen der Eigenarbeit: Theorie, Empirie, Vorschläge*. Opladen: Westdeutscher Verlag.

Badelt reviews socio-political demands and expectations about various forms of unpaid work in the social services. He then presents different elements of unpaid work in the welfare state: the emancipatory element, achievements and needs, and financial savings. Unpaid work is described in detail and data on traditional social service providers are evaluated. For this purpose two questions are discussed: (1) Is it possible to expand unpaid work further? (2) What are the socio-economic-political effects of expanding unpaid work for social services?

Hanesch, Walter. 1989. *"Sozialpolitische Rahmenbedingungen und Beschäftigungsprognosen in der sozialen Arbeit"*. [Social policy and employment]. Pp. 87-105 in Hanesch, Walter (ed.). *Fachhochschule und Arbeitslosigkeit: Perspektiven für Arbeitsmarkt und Ausbildung in der sozialen Arbeit*. Weinheim: Juventa Verlag.

Hanesch analyses the conditions determining future employment in social work. In addition to developing the supply of social work professionals, the development of the demand side plays a decisive role in this labour market sector. According to some prognoses, the demand for social services will decrease in the following years. Even if an expansion of social services is realised, the position of social work among professional social services remains unclear. In view of the ongoing crisis of the social welfare state, the future importance of

social services occupations and the further development of social services are questioned.

Müller, Walter, Thomas Riede, Andrea Schott-Winterer, Alfred Woller, Reinhard Stockmann. 1987. "Soziale Dienstleistungen als Beruf (soziale Dienstleistungen)". [Social work occupations]. Pp. 219-245 in NN. *Mikroanalytische Grundlagen der Gesellschaftspolitik: Sonderforschungsbereich 3 "Mikroanalytische Grundlagen der Gesellschaftspolitik"; Bericht über die Forschungstätigkeit in der dritten Forschungsphase 1985-1987* (Universität Mannheim). Mannheim. This research project addresses the development of full-time employment in social services and the influence of their institutional conditions from an international perspective. Three "central developments of the social structure of developed societies" are considered: the expansion of economic activities into the Third Sector, the expansion of the welfare state, and the "professionalisation of services in education, maintenance, care, nursing and assistance". The authors sketch the development of social services and focus on the importance of this sector for the employment of women, variation in tasks and social services delivery, and the division of labour within specific social service areas.

## 7. Clients, users, and consumer issues, profiles

Effinger, Herbert. 1996. "Kundenorientierung Sozialer Arbeit: ökonomische Engführung oder Erweiterung des Sozialen?" [Customer orientation and social work]. *Sozialmagazin: die Zeitschrift für Soziale Arbeit* 21 (11): 36-46.

Effinger discusses the client and service orientation of social work. Is social work being de-nationalised and put back into the market, privatised, commercialised and subordinated to foreign regulating principles, thus encouraging social inequality instead of balancing it? Effinger explains how a „client and service orientation“ can help professionalise social work and enable individuals to become responsible citizens. He shows clearly that the terms "service" and "client" are not limited to principles of free enterprise regulations, but that it is possible to turn clients into customers who can act as sovereign citizens.

Bauer, Rudolph and Hartmut Dießenbacher (ed). 1984: *Organisierte Nächstenliebe: Wohlfahrtsverbände und Selbsthilfe in der Krise des Sozialstaats*. [Organised philanthropy]. Opladen; Westdeutscher Verlag.

This volume of conference papers contains an article on meeting needs in recreation welfare and the decision-making process among citizens, social institutions, agencies, national organisations and federal states. Citizens' ability to win recognition of their demands is low when nonconformative in nature, and is dependent on financial and political elements such as the preservation of the top organisation in a given political context.

Wirth, Wolfgang. 1982. *Inanspruchnahme sozialer Dienste: Bedingungen und Barrieren*. [Social service utilisation]. Frankfurt am Main: Campus Verlag. Which conditions foster or hamper the demand for social services? Which factors limit or prevent their practical use? Wirth reveals selection and exclusion mechanisms using the empirically proven class dependent use of social services. Together with determinants on individual decisions this example helps explain the use of social services. In multilevel, complex processes, selection and exclusion mechanisms result in a smaller number of low-income earners as clients compared to others, despite their potentially higher need for assistance. The author discusses four “client career” phases, the determinants of the probability of demand for social services, the development of individual demand for services offered, the transformation of demand into claims, and the claim as an interactive process. Each of these also represents four levels of selection, which are analysed in detail regarding the discriminatory reduction of possible claims by lower income earners.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Metzler, Heidrun and Elisabeth Wacker. 1998. *Soziale Dienstleistungen: zur Qualität helfender Beziehungen*. [Social service and quality]. Tübingen: ATTEMPTO Verlag.

The quality of social and medical services is at the centre of political and academic discussions. Two contrary positions shape the debate in a special way: the desire to improve services by debureaucratising and individualising them, versus the demand to increase profitability and efficiency by concentrating only on absolute necessities. In this book medical professionals, pedagogues and sociologists shape the rising tensions between value orientation and social fragmentation, professionalism and lay assistance, power and powerlessness, questioning social services and suggesting how to measure their quality.

Badelt, Christoph. 1997. “Sozialmanagement: ein kontroverses Konzept zur Integration von wirtschaftlichem und sozialem Denken?” [Social management]. *Soziale Arbeit: deutsche Zeitschrift für soziale und sozialverwandte Gebiete* 46 (10/11): 326-337.

For ten years debates concerning the potential and limit of social management has intensified. This debate takes place both in professional social work circles and in academic debate, taking up political dimensions and demanding more „efficient“ social work appropriate to lower budgets. Badelt discusses these controversial debates and considers how far social and economic thinking can be integrated through the idea of social management.

Kulbach, Roderich. 1996. "Organisationswandel sozialer Dienste." [Organisational change and social services]. *Soziale Arbeit: deutsche Zeitschrift für soziale und sozialverwandte Gebiete* 45 (2): 38-43.

In times of decreasing public funds and increasing social problems, the legitimacy of social services increases. In response to changes in administration and output-orientated models of regulation, measures to optimise social work are needed. Pilot tests show that adjusting social services to local demand fosters discourse critical of achievement between social service providers and clients, while building network structures. A network of services involving diverse providers will help standardise social services and demonstrate their efficiency and effectiveness.

Olk, Thomas and Dieter Grunow, Stefan Huf, Christoph Strünck, Heinz Rothgang, Stephan Lessenich, Stephan von Bandemer, Josef Hilbert, Edeltraut Roller, Sabine Kühnert, Angelika Engelbert, Hanfried Andersen, Johannes Schwarze, and Ingo Bode. 1996. "Effektivität und Effizienz in der Sozialpolitik." [Effectiveness and efficiency in social policy]. *Zeitschrift für Sozialreform* 42 (11/12): 689-838.

This special issue contains papers from the annual conference of the German sociology society, 1996. Contributors discuss: 1. Effectiveness and efficiency in social policy. 2. Efficiency and social policy – can social policy be shaped efficiently? 3. On myths, power and paradox effects. Economic reforms in independent welfare support. 4. On the way to increasing effectiveness and efficiency? The „rebuilding of the welfare state“ in legal health insurance. 5. Rebuilding deconstructions. The embarrassing secrets of the debate concerning effectiveness and efficiency of social policy. 6. Social services and health as growth sectors – chances and challenges. 7. Cutting social welfare from the perspective of citizens. 8. Securing quality in care of the elderly. 9. Demanding the family by the welfare state. The problematic effect of family co-production. 10. The free choice of health insurance – a social experiment: economic and sociological analyses of individual decision processes and the building of preferences. 11. Cultural war in the social state: how do efficiency blocks evolve?

Knappe, Eckhard and Stephan Burger. 1994. *Wirtschaftlichkeit und Qualitätssicherung in sozialen Diensten*. [Efficiency and quality control in social services]. Frankfurt am Main: Campus Verlag.

The demand for greater efficiency in social service delivery dominates social service debates more than any other topic in Germany. The focus of discussion is on how to run services knowing that economic behaviour cannot be dictated. The euphoric planning phase in the 1960s and 1970s removed financial bottlenecks but also generated inefficient structures. New plans are currently being considered in view of sharply rising expenses and simultaneously decreasing finances. Financial trends rather than planning orders from above will ensure that the provision of social services is delivered effectively and efficiently.

## 9. Patterns of relations among providers

Matthies, Aila-Leena. 1998. "Von der öffentlichen Dominanz sozialer Dienste zum Aufbau intermediärer Instanzen? Finnland und die neuen Bundesländer im Vergleich." [Public sector dominance and service delivery]. *Soziale Welt: Zeitschrift für sozialwissenschaftliche Forschung und Praxis* 49 (1): 57-70.

Matthies' comparison between Finland and the new federal states in Germany shows that in both societies the previously coherent and even picture of social services has changed into an uneven and regionally differentiated one. For this phase of development, internal differentiation of the nonprofit sector emerges. On one hand the take-over by private organisations is fostered by government through legal and financial incentives ("welfare-mix from above"). On the other hand, new mixed forms of actors evolve in relation to locally specific situations ("welfare-mix from below"). The new development of local and sector-crossing networks integrating associations, churches, private companies, local authorities and active citizens aims to alleviate the effects of economic structural change, unemployment and reduced services. For this, flexible forms of co-operation between a relatively strong provision network and nonprofit groups are highly important.

Deimer, Klaus and Martin Pfaff. 1992. "Koordination zwischen intermediären Instanzen und Selbstorganisation bei der sozialen Leistungserstellung." [Co-ordination and self-help in service delivery]. Pp. 39-53 in Bock, Teresa (ed). *Sozialpolitik und Wissenschaft: Positionen zur Theorie und Praxis der sozialen Hilfen*. Frankfurt am Main: Eigenverlag d. Dt. Vereins f. öffentl. u. private Fürsorge.

For more than a decade social services provision has experienced ever growing difficulties. The financial bottlenecks of public, communal and nonprofit institution funding combine with the diminishing importance of nonprofit institutions, especially regarding their ability to find appropriate solutions. Deimer and Pfaff focus on the organisational issues, tasks and financing of social work which are in tension with nonprofit institutions and self-help organisations.

Boll, Fritz and Thomas Olk (Ed). 1987. *Selbsthilfe und Wohlfahrtsverbände*. [Self-help and welfare association]. Freiburg im Breisgau: Lambertus-Verlag.

This work discusses welfare organisations and self-help groups through policy, social science, association and self-help group perspectives. They elucidate the need for welfare support be made more effective, particularly from the perspective of welfare organisations. The authors point toward co-operation between welfare organisations and self-help initiatives.

## 10. Innovation and change

Neuffer, Manfred. 1998. "Fallarbeit in einer Hand: Case Management in Sozialen Diensten." [Case management]. *Sozialmagazin: die Zeitschrift für Soziale Arbeit* 23 (7/8): 16-27.

The relatively new concept of case management imported from the United States seems to meet the demands for effectiveness and efficiency which are raised by the marketisation of social work. Neuffer concentrates on youth departments, giving significant attention to ongoing responsibility for single cases in educational support.

Kulbach, Roderich and Norbert Wohlfahrt. 1996. *Modernisierung der öffentlichen Verwaltung?: Konsequenzen für die freie Wohlfahrtspflege*. [Modernisation of public administration?]. Freiburg im Breisgau: Lambertus-Verlag.

Although the modernisation of public administration is increasingly dominated by measures to consolidate budgets, it includes a fundamental administrative reform with enormous implications for social services provided by non profit organisations. The authors sketch the central elements of contracting-out and describe in a detailed manner the pending changes in welfare organisations. The subsidiary principle is being replaced by one of supplier amongst equal competitors (market oriented non-profit enterprises); their promotion is changing from grants and nursing rates (cost-covering) to prospective payments for services. The authors describe how independent non-profit institutions and organisations can react to these challenges by developing their structure, flow and self-concept (i.e. their service orientation, budgeting, management and personnel management).

Flösser, Gaby. 1994. *Soziale Arbeit jenseits der Bürokratie: über das Management des Sozialen*. [Social work beyond bureaucracy]. Neuwied: Luchterhand.

The shift away from the dominant bureaucratic model of professional social work organisation is now reaching a new level of quality. The achievement capability of the traditional spectrum of social services offered by the public sector, associations and self-help groups is increasingly contested. Private commercial suppliers approach social services from a fundamentally different starting point, thus raising discussions of new models of customised social services regulation. In this study the author argues that beyond bureaucracy, the challenges for a new social work centre on the development of new production concepts and increasingly global perspectives of forms of work and institutions. Structural demands are bundled into a model for „management of the social“, for which internal organisational forms offer a precondition but not a final solution.

Nokielski, H. 1993. "Universalität, Partikularität, Individualität: zum Wandel der Orientierungsmuster sozialer Dienste." [Changes in social service principles]. *Zeitschrift für Sozialreform* 39 (11): 667-678.

German reunification and competition policy of the European integration process have challenged welfare organisations to rethink their position and function within the social services system. Welfare organisations are currently undergoing organisational development and reconsidering key concepts. Stimulated by these discussions, Nokielski sketches an alternative orientation for organisations by sociological categories. Initially, the author relies on Parson's polarised universal and particularistic orientations. Motivated by Simmel's ideas of „qualitative individualism“, he sketches some of the problems of organised assistance which result from increasing individualisation of social orientations.

Oliva, Hans, Hubert Oppl and Rudolf Schmid. 1991. "Innovation in sozialen Diensten: die aktuellen Rahmenbedingungen des sozialen Dienstleistungssektors; Chancen durch Organisationsanalyse und Organisationsentwicklung." [Innovation in social services]. *Blätter der Wohlfahrtspflege: Deutsche Zeitschrift für Sozialarbeit* 138 (5): 111-115.

Social services must increasingly adapt to changing social conditions, but the extent to which needs can be met through the development of new services is limited. This article develops a structural profile of other necessary innovations, describing possible qualitative modifications such as de-specialisation, establishing multifunctional infrastructure or improving connections between the different achievement fields.

## 11. European Union and globalisation issues

Schulz-Nieswandt, Frank. 1997. "Zukünftiger Bedarf altenbezogener sozialer Dienste in der europäischen Union". [Demand for services for the elderly in the EU]. Pp. 139-185 in Eckart, Karl and Siegfried Grundmann (ed). *Demographischer Wandel in der europäischen Dimension und Perspektive*. Berlin: Duncker & Humblot. Schulz-Nieswandt addresses selected aspects of the nursing situation in Europe. He presents the situation in Germany and ideas about restructuring the social state with regard to human geography, and then studies demography and gender. Looking at three groups of countries – the Scandinavian Netherlands axis, Great Britain and the core of continental Europe, and the Catholic-Mediterranean axis – the author shows that in an ageing Europe there are important deficits in social services provision, with over-demand on private networks and avoidable institutionalisation.

Ipsen, Knut. 1997. *Soziale Dienstleistungen und EG-Recht: Auswirkungen des Europäischen Gemeinschaftsrechts auf die mitgliedstaatliche Förderung sozialer Dienst-*

*leistungen im Bereich der Freien Wohlfahrtspflege*. [Social services and EU legislation]. Berlin: E. Schmidt.

In this monograph the author presents his legal opinion to the ministry of labour, health and social matters of North-Rhine-Westfalia in March 1995. He discusses whether public support measures for free non-profit institutions are acceptable under European union law, and what limits European Union law places on demands. This addresses in a very elucidating way two important questions in political science. Are social services which are provided for non profit rather than market reasons effected by the single market, and can they function under the principle of competition? Are nonprofit welfare organisations currently affected by the single market and the working programmes of the European Commission, and to what degree? The former question is interesting for evaluating the development of European and German social policy, while the latter is relevant for European research on interest groups and organisations.

Prognos GmbH (ed). 1991. *Freie Wohlfahrtspflege im zukünftigen Europa: Herausforderungen und Chancen im Europäischen Binnenmarkt*. [Free welfare associations and Europe]. Köln.

Part One of this work presents the starting points and conditions of social security in EU member states, discusses social security and social services provision in member countries, previous social policy at EU level, and demographic, economic and social developments. The authors then explore the challenges of independent welfare support in Germany as a result of European integration and examine chances of future welfare support. Part Two provides background information on independent welfare support in Germany. A survey of economic, social and technological trends is offered, followed by country reports on social security in the Federal Republic of Germany, France, the Netherlands and Spain. The final section surveys social policy at the European Union level.

## 12. Bureaucratisation and/or commercialisation problems

Pompey, Heinrich (ed). 1997. *Caritas im Spannungsfeld von Wirtschaftlichkeit und Menschlichkeit*. [Caritas between economy and humanity]. Würzburg: Echter. Current financial and social conditions in the welfare state are creating pressures for welfare institutions of the Catholic church – the Caritas – to change. Innovations are needed as the church cannot simply change its welfare mission and reduce its services or quality of assistance. This edited collection includes work by Dirk Meyer on independent welfare services under the demands of a market economy (pp. 37-52); Franz Leven, providing an economic perspective on the future of voluntary work (pp. 98-152); Adolf Baue, discussing the financing of welfare services (pp. 176-187); Hubert Oppl, on challenges for church welfare

work between market and state (pp. 188-208); Norbert Glatzel, on ensuring (economically and organisationally) health and social services by government and independent social service providers (pp. 209-224); and Ralf Haderlein on the results of the symposium „Caritas between efficiency and humanity“ in the Caritas Academy Freiburg 1996 (pp. 402-409).

Maier, Konrad. 1995. „Notwendigkeit und Grenzen der Ökonomisierung Sozialer Arbeit.“ [On the limits of marketisation of social work]. *Sozialmagazin: die Zeitschrift für Soziale Arbeit* 20 (6): 45-49.

Maier discusses the marketisation of social work. His main theses are: (1) Social work has become a significant sector of the economy over the last twenty years; (2) The expansion of social work is a characteristic of flourishing welfare societies. Social work produces well-being and assistance for „successful everyday life“; (3) The transference of rationality and employment methods to social services meets structural problems, as neither demand for social work nor users can be defined clearly; (4) The economisation of social services would decrease the capacity of social work to fulfil important tasks, especially the political implementation of new social programmes; (5) Social services will not gain profit in the future and will remain non-profit enterprises; (6) The transference of structures of private economy organisation and leadership to social services would entail significant losses in participation and voluntary work; (7) Social work cannot elude the demand for efficient resource use and corresponding limits to its scope in society. The development of a positive and useful concept for this sector is needed which promotes competition between the three aims of professionalism, economic efficiency and participation or self-help.

Klug, Wolfgang. 1995. „Mehr Markt in die Freie Wohlfahrt: zum Problem marktwirtschaftlicher Bedingungen in der Freien Wohlfahrtspflege“. [Marketisation and the free welfare associations]. *Aus Politik und Zeitgeschichte: Beilage zur Wochenzeitung Das Parlament* B 25/26: 34-43.

Welfare organisations are increasingly confronted with competition, contradicting decades of philosophy indicating that the existence of welfare organisations is guaranteed alongside that of the market economy. They are increasingly forced to compete as other welfare providers fail to keep previous arrangements about dividing the market. Current financing modes still indicate that market economy principles are not applied in independent welfare support, due in part to the peculiar character of customised services and the target groups („the poorest of the poor“) whom the market does not sufficiently protect. But welfare organisations are maintaining traditional networking and financing structures while other organisations increasingly practice new management skills. For welfare organisations to change they would need to reorient themselves toward market economy issues, introduce differentiation of services offered, and clarify their

position in the welfare state. However, findings indicate it is a mistake to believe that privatisation can solve all problems.

Wolff, Stephan. 1983. *Die Produktion von Fürsorglichkeit*. [The production of welfare]. Bielefeld: AJZ Dr. und Verlag.

The provocative thesis of this book is that describing what social services do in terms of „assisting, social work, social problem solving“ and „stabilising the capitalistic process of utilisation“ is limited rather, the author refers to the product of social services (with client participation) as „Fürsorglichkeit“, describing the social „feeling“ of assistance, intervention or responsibly applied sanctions. „Fürsorglichkeit“ is produced not only in direct contact with clients but with departments in local authorities, the media, relevant political institutions, organisations and colleagues. Among other things it involves targeted public relations and sensitive practice with local commissions.

### 13. Comparative, cross-national issues

Schmid, Josef. 1997. „Zwischen politischer Macht und Nächstenliebe: zur Topographie von Wohlfahrtsverbänden im westeuropäischen Vergleich“. [Between market and compassion]. Pp. 83-105. In Alemann, Ulrich von und Bernhard Weßels (ed). *Verbände in vergleichender Perspektive: Beiträge zu einem vernachlässigten Feld*. Berlin; Edition Sigma.

Schmid points out the special status of welfare organisations as top organisations with public status. He presents an international comparative study focusing on social services production as a typical function of welfare organisations. He considers the overall system and scope of social service organisations and their relations with welfare states, as well as the subsystem level, with particular attention to associations in the health sector, the Red Cross and the Caritas. The author concludes that variation across Western European social service organisations can be explained above all by different state and church structures with varying opportunities for building associations and their socio-political functions.

Bauer, Rudolph. 1996. „Soziale Dienstleistungen, Qualitätsdiskurse und die Entpolitisierung des Sozialstaats: ein inhaltsanalytischer Drei-Länder-Vergleich“. [Social services and quality]. Pp. 247-273. In Armingeon, Klaus and Pascal Sciarini (ed). *Deutschland, Österreich und die Schweiz im Vergleich*. Zürich: Seismo Verlag. Bauer compares and debates questions concerning the quality and maintenance of social services. He presents findings of content analysis of disciplinary discussions and then summarises the results of the three German speaking countries. He then discusses cross-country consensus regarding economic efficiency criteria; this consensus is interpreted as an expression of the impending integration of social services into the market economy. Bauer illustrates the changes entailed in

the case of Germany, where the economisation of social services has depoliticised the welfare state.

Seibel, Wolfgang. 1991. "Vereine als Leistungsträger: der „Dritte Sektor“ in Frankreich und Deutschland im Vergleich". [Associations and service delivery]. Pp. 159-173. In NN. *Frankreich-Jahrbuch: Politik, Wirtschaft, Gesellschaft, Geschichte, Kultur* 4.

From a political comparative perspective the author examines the activities of clubs and associations "which work as institutions between governmental and private market economy services, comparing Germany and France". In particular Seibel debates the different embeddedness of welfare organisations in each national system. France is characterised by high state autonomy in relation to clubs and associations, whereas the neo-corporate German situation is characterised by authorities, parties and associations being more attuned to each other. These differences create different patterns of non-governmental welfare and social organisation in both countries.

#### 14. Current trends and policy issues; predictions

Hauser, Richard (ed). 1997. *Reform des Sozialstaats 1: Arbeitsmarkt, soziale Sicherung und soziale Dienstleistungen*. [Reform of the welfare state]. Berlin: Duncker & Humblot.

This volume contains papers presented at the 1995 conference of the Commission of Social Policy. Authors discuss: 1. The challenges and implications of globalisation for employment and welfare state; 2. Reforming unemployment insurance; 3. Further developing legal health insurance; 4. The aims, concepts and instruments of health reform 2000; 5. The alteration of the financial structure of social security and social insurance as an important element of restructuring the German welfare state; 6. The fairness of equivalent pensions; and 7. Social services and the restructuring of the welfare state.

Heinze, Rolf G. and Gerhard Naegele. 1995. "Die sozialen Dienste vor neuen Herausforderungen". [Social services and new challenges]. *WSI Mitteilungen: Monatszeitschrift des Wirtschafts- und Sozialwissenschaftlichen Instituts in der Hans-Böckler-Stiftung* 48 (6): 404-410.

The traditional structures of social services in Germany are challenged by the new needs generated by demographic. Classic voluntary work potential decreases, private market competitors challenge welfare organisations, and municipalities must increasingly moderate and network. Service orientation receives much attention while quality assurance and consumer protection are underdeveloped. In order to modernise social services a „welfare mix“ must be conceptualised and social service occupations must adapt to new quality demands.

Giebel, Heiner, Peter Sauer, and Stephan Wagner. 1995. *Soziale Dienste, freie Wohlfahrtsverbände und betriebliche Sozialpolitik, intermediäre Organisationen und ihre Klientel*. [Social services, free welfare associations and social policy]. Kommission für die Erforschung des sozialen und politischen Wandels in den neuen Bundesländern E.V.: Halle.

This document surveys social services in the GDR and the new federal states, identifying unanswered research questions. The survey considers (1) organisational structure and personnel of social services, (2) further education and professional training, (3) residential care centres, (4) social policy of companies, (5) housing and housing environment, and (6) rural areas. The research is also differentiated by client groups (the elderly, unemployed, youth, families, women and immigrants). Research organisations and research projects are documented in the annex.

Ferber, Christian von and Joachim Braun. 1995. "Kommunale Krise und die Gestaltung der Sozial- und Gesundheitsdienste." [Municipal crises and social and health services]. Pp. 133-146. In Kreyher, Volker J. and Carl Böhrer (ed). *Gesellschaft im Übergang: Problemaufrisse und Antizipationen*. Baden-Baden; Nomos Verlags-Gesellschaft.

In Germany as other Western and Northern European countries, health legislation and the transformation of the welfare state by the early 1980s marked the beginning of the end of the welfare state. Accompanying this transformation is concern about increasing social exclusion. Ferber and Braun describe the reorganisation of the social and health service economy as today's great challenge, and question the entire social policy system. How are synergy effects opened up by co-operation and networking among the professions and institutions? How is self-help mobilised by wide and differentiated promotion? And how can the product, quality and efficiency of social services be improved with networking and mobilisation strategies?

Braun, Hans and Gabriele Johné. 1993. *Die Rolle sozialer Dienste in der Sozialpolitik*. [The role of social services in social policy]. Frankfurt am Main: Campus Verlag.

Braun and Johné introduce the main characteristics of the service society and its effects on socio-political fields, and discuss the production and direct delivery of social services from an economic perspective. They then present a study of the co-operation and co-ordination of social services in municipal social policy.

## **15. Other topics: former GDR, German unification and transformation process; Political Economy; Feminist Approach**

Angerhausen, Susanne and Holger Backhaus-Maul, Claus Offe, Thomas Olk, Martina Schiebel. 1998. *Überholen ohne einzuholen: freie Wohlfahrtspflege in*

*Ostdeutschland*. [Free welfare associations in eastern Germany]. Opladen: Westdeutscher Verlag.

The creation of independent welfare structures in the new federal states is largely finished. This wide empirical study sketches the process of transforming public institutions and building decentralised agencies in a main area of German social policy. The authors depict the system of social service production in Federal Germany and the GDR, and through regional studies of organisations reveal the strategies of public and municipal actors, particularly national and professional organisations, self-help initiatives and clubs. The authors show that the evolution of a specific mix of East German traditions and decisions concerning the reunification process has enabled East German welfare to overtake West German welfare, but at the risk of losing essential traits of independent welfare support.

Beck, Martin. 1992. "Situation der Freien Wohlfahrtspflege in den neuen Bundesländern." [Welfare associations in East Germany]. *Soziale Arbeit: deutsche Zeitschrift für soziale und sozialverwandte Gebiete* 41 (10/11): 385-394.

This article discusses why the problems of independent welfare in the new federal states of Germany will sooner or later touch the West as well. The equalisation of living conditions cannot be achieved merely by increasing standards in the East. The author uses situational analysis to describe the consequences of political change for the health system in the GDR and to show where independent welfare support is today in the new federal states. He discusses the external and internal images East German welfare organisations and debates the effects of reunification on West German organisations. Individual problems touched upon include technical aids, finance and bureaucracy.

Heinze, Rolf G., Josef Schmid and Christoph Strünck. 1997. "Zur politischen Ökonomie der sozialen Dienstleistungsproduktion: der Wandel der Wohlfahrtsverbände und die Konjunkturen der Theoriebildung." [Political economy of social service production]. *Kölner Zeitschrift für Soziologie und Sozialpsychologie* 49 (2): 242-271.

The most important social service suppliers in Germany – non profit welfare organisations – are being confronted with new processes of change. Internally, economic patterns of rationalisation are gaining importance; externally, legislative change and the emergence of new user groups are calling into question the priorities of these organisations. This paper looks for the gains made by welfare research and sketches a more economic-sociological perspective. The authors propose to complete and modify the dominant neo-corporatism theorem. Causes of internal and external change are discussed and interpreted as a deferral from "status" to "contract", using terms from industrial sociology. Objecting to the widely accepted description of the change process as one of "economisation" and „enterprising“, the authors argue that the pattern "from status to contract" shows an increasing interplay of „economisation“ and "politicisation".

Meyer, Traute. 1997. *Ungleich besser?: die ökonomische Unabhängigkeit von Frauen im Zeichen der Expansion sozialer Dienstleistungen*. [Women and social service delivery]. Berlin: Edition Sigma (zugl. Berlin: Freie Univ., Diss., 1995).

Meyer argues that the growth of social services increases women's economic independence. The author discusses the causes and social consequences of expanding social services and presents a survey of the institutional structure of German and British welfare states. Using cross-sectional analysis, she studies employment rates among women and men differentiated by economic sectors since the 1960s, the composition of social services occupations, women's salaries and working conditions in Germany and the UK. The comparison shows characteristic differences between the German welfare state ("provision mentality") and the British welfare state ("self-supply milieu"). Socio-political means of creating greater equality between men and women in both systems are suggested.

## C. Special fields

### Child and Youth Welfare

Wabnitz, Reinhard. 1998. *Kinder und Jugendhilfe im vereinten Deutschland: wissenschaftliche Abhandlungen, Reden und Fachveröffentlichungen 1991–1998*. [Youth and child welfare]. Stuttgart: Kohlhammer.

Seckinger, Mike. 1998. *Situation und Perspektiven der Jugendhilfe: eine empirische Zwischenbilanz*. [Youth welfare]. München: Verlag Deutsches Jugendinstitut.

Seifert, Brigitte. 1997. *Bibliographie Jugendhilfe: Literatur zur Jugendforschung, Jugendhilfe und Jugendpolitik 1991–1996*. [Bibliography of youth welfare]. München: Verlag Deutsches Jugendinstitut.

Nüberlin, Gerda. 1997. *Jugendhilfe nach Vorschrift?: Grundlagen, Probleme und Vorschläge der Umsetzung des neuen Kinder und Jugendhilferechts in sozialpädagogische Praxis*. [On the new youth and child welfare law]. Pfaffenweiler: Centaurus-Verlags-Gesellschaft.

Gernert, Wolfgang. 1993. *Jugendhilfe: Einführung in die sozialpädagogische Praxis*. [Social work and youth welfare]. München: Reinhardt.

### Family services

Helming, Elisabeth (ed). 1999. *Handbuch Sozialpädagogische Familienhilfe*. [Social work and family services]. Stuttgart: Kohlhammer.

Textor, Martin R. 1998. *Hilfen für Familien: eine Einführung für psychosoziale Berufe*. [Introduction to family services]. Weinheim: Beltz.

Frings, Peter. 1993. *Sozialpädagogische Familienhilfe in freier Trägerschaft: rechtliche Grundlagen und Rahmenbedingungen*. [Free welfare associations and family services]. Freiburg im Breisgau: Lambertus.

Altmeyer-Baumann, Sabine. 1992. *Familiale Übergänge im Wandel: Modelle und Hilfsangebote zur Bewältigung familialer Krisen*. [Models of family services and assistance]. Wiesbaden.

Hebenstreit-Müller, Sabine (ed), 1991. *Organisation, Förderung und Vernetzung von Familienselbsthilfe: Erfahrungen aus einem Modellversuch mit Familien und Nachbarschaftszentren*. [Family self-help models]. Bielefeld: Kleine.

## **Frail elderly, nursing homes, long-term care**

Belardi, Nando. 1999. *Altenhilfe: eine Einführung für Studium und Praxis*. [Introduction to services for the elderly]. Weinheim: Beltz.

Alber, Jens. 1999. *Seniorenpolitik: die soziale Lage älterer Menschen in Deutschland und Europa*. [Policies for services for the elderly in Germany and Europe]. Amsterdam: G+B-Verlag Fakultas.

Baumgartl, Birgit. 1997. *Altersbilder und Altenhilfe: zum Wandel der Leitbilder von Altenhilfe seit 1950*. [Images of old age and social services]. Opladen: Westdeutscher Verlag.

Brandt, Hans. 1993. *Altenhilfe als Verbundsystem: Überlegungen zum planvollen rechtlich-organisatorischen und konzeptionell-fachlichen Zusammenwirken von medizinischen, pflegerischen und sozialen Hilfen*. [On the organisational and legal aspects of services for the elderly]. Köln: Kuratorium Dt. Altershilfe.

Frieling-Sonnenberg, Wilhelm. 1992. *Altenheime in der Krise?: Handbuch zu den Perspektiven einer Institution*. [Homes for the elderly – a crisis?]. Hannover: Vincentz.

## Health care related social services, convalescence and rehabilitation

Beske, Fritz. 1999. *Das Gesundheitswesen in Deutschland: Struktur – Leistung – Weiterentwicklung*. [The health care system in Germany]. Köln: Deutscher Ärzte-Verlag.

Delbrück, Hermann. 1998. *Rehabilitationsmedizin: ambulant, teilstationär, stationär*. [Rehabilitation]. München: Urban & Schwarzenberg.

Hohmann, Jürgen. 1998. *Gesundheits-, Sozial- und Rehabilitationssysteme in Europa: gesellschaftliche Solidarität auf dem Prüfstand*. [Health, social and rehabilitation services in Europe]. Bern: Huber.

Homfeldt, Hans Günther (ed). 1997. *Soziale Arbeit und Gesundheit*. [Social work and health]. Neuwied: Luchterhand.

## Handicapped

Häussler, Monika. 1996. *Lebenssituation von Menschen mit Behinderung in privaten Haushalten: Bericht zu einer bundesweiten Untersuchung im Forschungsprojekt "Möglichkeiten und Grenzen selbständiger Lebensführung"*. [On the situation of the disabled]. Baden: Nomos-Verlags-Gesellschaft.

Wröbel, Manfred. 1994. *Die Sozialversicherung der Behinderten*. Sankt Augustin: [Social insurance and the disabled]. Asgard-Verlag Hippe.

Beck, Iris. 1994. *Neuorientierung in der Organisation pädagogisch-sozialer Dienstleistungen für behinderte Menschen: Zielperspektiven und Bewertungsfragen*. [New service models for the disabled]. Frankfurt am Main: Lang.

Dahlinger, Erich. 1991. *Die Eingliederung Behinderter: Aufgaben und Ziele bei der Eingliederung Behinderter; Eingliederungshilfe nach dem BSHG; Eingliederungshilfe nach dem SGB VIII*. [Integration of the disabled]. Frankfurt am Main: Eigenverlag des Dt. Vereins für Öffentl. u. Priv. Fürsorge.

## Homeless, the poor, poverty

Walter-Hamann, Renate (ed). 1999. *Menschen, Märkte, Lebenswelten: Differenzierung und Integration in den Systemen der Wohnungslosenhilfe*. [Types of homelessness and services]. Bielefeld: Verlag Soziale Hilfe.

Ansen, Harald. 1998. *Armut – Anforderungen an die soziale Arbeit: eine historische, sozialstaatsorientierte und systematische Analyse aus der Perspektive der sozialen Arbeit*. [Poverty and social work]. Frankfurt am Main: Lang.

Bäcker, Gerhard. 1997. *Armut im Sozialstaat: gesellschaftliche Analysen und sozialpolitische Konsequenzen*. [Poverty and social welfare states]. Neuwied: Luchterhand.

Eckardt, Thomas. 1997. *Arm in Deutschland: eine sozialpolitische Bestandsaufnahme*. [Poor in Germany]. München: Olzog.

Preusser, Norbert. 1993. *Obdach: eine Einführung in die Politik und Praxis sozialer Aussonderung*. [The homeless and social exclusion]. Weinheim: Beltz.

Drygala, Anke. 1986. *Obdachlosenhilfe im Sozialstaat: eine Untersuchung über Kontaktstellen zur Verhinderung von Obdachlosigkeit*. [Homelessness and the welfare state]. Weinheim: Beltz, 1986.

## Unemployed

Adamy, Wilhelm. 1998. *Abseits des Wohlstands: Arbeitslosigkeit und neue Armut*. [Unemployment and the new poverty]. Darmstadt: Wissenschaftliche Buchgesellschaft.

Wolski-Prenger, Friedhelm (Ed). 1996. *Arbeitslosenarbeit: Erfahrungen, Konzepte, Ziele*. [Working with the unemployed]. Opladen: Leske + Budrich.

Commandeur, Anja. 1996. *Mißbrauch von Sozialleistungen: am Beispiel der Gewährung von Arbeitslosengeld und Arbeitslosenhilfe durch die Bundesanstalt für Arbeit*. [Misuse of social assistance]. Köln, Univ., Diss., 1996.

Kratz, Hans-Jürgen. 1988. *Arbeitslosengeld, Arbeitslosenhilfe*. [Unemployment assistance]. Saarbrücken: Arbeitskammer d. Saarlandes, Abt. Presse U. Information, 1988.

## Immigrants and refugees

Schmahl, Hans Ludwig. 1995. *Entwicklungen des Ausländer- und Asylrechts in Deutschland*. [Legal background and developments]. Brühl: Fachhochschule des Bundes für Öffentliche Verwaltung.

Bade, Klaus J. (Ed). 1994. *Ausländer, Aussiedler, Asyl in der Bundesrepublik Deutschland*. [Foreigners, asylum seekers and resettlement in Germany]. Hannover: Niedersächsische Landeszentrale für Politische Bildung.

Cropley, Arthur J. (Ed). 1994. *Aussiedler und Flüchtlinge in Deutschland*. [Resettlers and refugees in Germany]. Göttingen: Verlag für Angewandte Psychologie.

Nestmann, Frank (ed). 1993. *Beratung von Migranten: neue Wege der psychosozialen Versorgung*. [Advising immigrants]. Berlin: Verlag für Wissenschaft und Bildung.

Hayungs, Jochen C. 1991. *Die sozialhilferechtliche Stellung sogenannter De-facto-Flüchtlinge*. [Refugees and social assistance laws]. Frankfurt am Main: Deutscher Verein für Öffentl. u. Private Fürsorge.

#### **D. Summary assessment of current debates in the field**

Professional social services have expanded enormously as a reaction to increasing demand and diminishing social assistance by families and social networks. Current demographic conditions and continuous structural unemployment indicate that qualitative and quantitative demands for assistance and support will continue to rise in the future and will conflict with current trends toward cost reduction in social services. Two main approaches have emerged: 1. Privatisation and outsourcing of social services, and 2. Promotion of family assistance and self-help.

There are expectations that privatising and outsourcing will create a cheaper and more effective service provision. However in intensive personal services which are offered and privately financed according to criteria of cost and gain, price levels may become unaffordable to lower income groups. Meanwhile the expansion of family welfare, self-help and voluntary activity has an ambivalent character. On one hand it strengthens self-responsibility and small networks and revitalises neighbourhoods through a sustainable development approach. But at the same time it may be used to justify government cutbacks, and by factoring in unpaid family work typically undertaken by women it may sharpen the gendered labour division and discrimination against women.

# Greece

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## A. Synopsis of the social service system

There is widespread agreement among scholars that the Greek welfare state belongs in the continental 'state corporatist' model of welfare capitalism. The Greek system of social insurance is not universalistic but retains some variability in benefits determined by work schemes and professional categories. Overall, the system is financed through contributions, and non-contributory benefits are the lowest in Europe. Thus, benefits to the elderly comprise most of the state's welfare expenditure while other social services remain largely underfunded.

There are no overall attempts to look at social services in Greece but rather independent attempts to look at small sectors of the social service economy. It is assumed that personal social services are separate from health services and social security transfers, but they are not described in detail in public policy documents.

Part of the difficulty with defining personal social services in Greece appears to arise from the multiplicity of provider types. The Greek social service system consists of private, nonprofit and public providers each sharing a particular relationship with the state. Most of the largest and oldest providers are completely or largely funded by the state. The state funds some foundations on a permanent basis, while other social service providers must submit yearly proposals and compete for funding. Another significant group of providers are private charities and fundraising activities. Many service-providing associations depend on volunteers but most rely on employees who are often seconded by state institutions.

Another difficulty in defining the field of social service provision arises from the diversity of the groups in need of personal services. Traditionally the Greek state has been considered responsible for providing services to three categories of citizens: families and children, the elderly, and persons with disabilities. Thus in the Greek Ministry of Health and Welfare one finds three directorates each responsible for the administration of services to these three social groups. However, over the past few decades an increasing number of groups including immigrants and refugees, ethnic minorities and substance abusers began demanding services and captured the attention of the Greek state.

Unfortunately, despite increasing welfare needs policy makers and analysts have made few attempts at the documentation necessary to find appropriate responses. No data exists on the social service economy except for some lists of providers

compiled by researchers. The Greek Ministry of Health and Welfare does not track the level of funding to social service providers each year. The bibliography that follows comments on available readings in this field and suggests the urgency of encouraging research on personal social services in Greece.

## B. Annotated Bibliography

### 1. Comprehensive works, overview volumes, classics

Getimis, Panayiotis and Dionisis, Gravaris. (1993). *Κοινωνικό Κράτος και Κοινωνική Πολιτική* [Social State and Social Policies]. Athens: Themelio.

This volume is a recent classic in Greek welfare studies. Its two editors, well known for other contributions in this field, bring together a wide range of social scientists from various disciplines. The volume opens with a discussion of theories on the rationality of social administration. A second chapter examines the theories of Nozick, Rawls and Dworkin and their relevance for understanding individual rights to social welfare. The remaining chapters examine specific topics in Greek welfare. These include: the financing of welfare, centralisation and the promotion of urban areas, work and welfare, social security in Greece as compared to other European countries, education and work, health expenditures, informal personal services, housing policy, the environment, mass consumption, and the influence of the European Union on social welfare in Europe. The chapter by Olga Stasinopoulou on the informal economy of welfare in Greece is particularly important for understanding the structure of social service provision.

Katrougalos, George S. (1996). "The South European Welfare Model: The Greek Welfare State in Search of an Identity." *Journal of European Social Policy* 6 (1): 39-60.

This is the most succinct and current classification of the Greek welfare system in comparative perspective. The author posits that while the Greek welfare state is clearly on its way to meeting the standards of other European states, it must still develop considerably. Katrougalos suggests that the Greek model of welfare comes closest to Esping-Andersen's (1990) state corporatist model of welfare capitalism. State-corporatist welfare states are financed by employers and employees and distribute social security transfers depending on one's profession and social status. The author provides a brief historical overview of the development of the Greek welfare system and discusses its shortcomings.

Maloutas, Thomas and Dimitris Economou. (1988). *Προβλήματα Ανάπτυξης του Κράτους Πρόνοιας στην Ελλάδα* [Development Problems of the Greek Welfare State]. Athens: Exantas.

This often cited volume consists of essays on key issues in Greek social welfare

such as the debate on local vs. central government jurisdictions in welfare, women and welfare provision, education, and the connection between economic growth and welfare development. While these essays do not specifically address the provision of personal services, they address factors that directly affect social service provision and define the character of the Greek welfare system.

Mastroiannis, Ioannis. (1969). *Κοινωνική Πρόνοια* [Social Welfare]. Athens. This is the most classic historical overview of the development of personal social services in Greece. It is written in colloquial Greek by one of the first masters of the topic in Greece. Unfortunately as it provides no references and often reads as a compilation of anecdotes, much of the book's evidence is very hard to verify, partly due to its uniqueness as a source. Mastroiannis's greatest contribution is his insistence that traditionally private initiative, great philanthropists and volunteers, played a crucial role in social service provision in Greece. The book also describes the first attempts by the Greek state to devise a comprehensive system of social protection.

Petmesidou, Maria. (1992). *Κοινωνικές Ανισότητες και Κοινωνική Πολιτική* [Social Inequalities and Social Policy]. Athens: Exantas. This is a quintessential study of the problems and dynamics of the Greek welfare system. The author suggests that despite existing inequalities, the welfare system has so far done very little to equalise opportunities and redistribute wealth due to the absence of a rationalised state apparatus. The current political system continually reproduces the pre-existing social order and disorder. The Greek welfare system tends to favour the middle social strata and fails to include social groups that lack the power to adequately represent themselves.

Sakis Karagiorgas Foundation. (1993). *Διαστάσεις της Κοινωνικής Πολιτικής Σήμερα* [Dimensions of Social Policy Today]. Athens: Sakis Karagiorgas. This heavy volume consists of a series of conference presentations prepared by some of the leading experts in social welfare in Greece. The most interesting sections of the volume investigate aspects of social service provision for the unemployed, the poor, immigrants, the homeless and families. While often generalistic and based on few facts, many of the chapters in this volume provide useful background for the study of social services in Greece.

## 2. Supply and demand of social services

Karadinos, D; Maratou-Alipradi, L. and Fronimou, E. (Eds.). (1996). *Διαστάσεις του Κοινωνικού Αποκλεισμού, Κύρια Θέματα και Προσδιορισμός Προτεραιοτήτων Πολιτικής* [Dimensions of Social Exclusion: Main Issues and Setting of Policy Priorities], 2 vols. Athens: EKKE.

This two-volume work is by far the most complete and systematic attempt to

describe the conditions socially excluded groups face in Greek society. Each chapter is dedicated to a different social group and provides information on relevant legislation, social policies and social services. Thus different chapters are dedicated to children, women, drug addicts, AIDS victims, immigrants and refugees, the disabled, prisoners and ex-prisoners, delinquents, minorities, the elderly and the chronically ill. Another group of chapters tackles particular issues of social exclusion such as inequality in the workplace, education, housing and health and welfare. This work is the first significant attempt to identify welfare policy gaps in Greece and to demonstrate the inadequacies of the Greek welfare system in dealing with socially excluded groups.

KEPE (Centre for Planning and Economic Research). (1985). *Κοινωνική Πρόνοια, Εκθέσεις για το Πρόγραμμα 1983–1987* [Social Welfare: Reports on the 1983–1987 Plan]. Athens: KEPE.

This volume contains a series of essays on the availability and quality of services for different social groups in 1985. Each essay reviews recent state progress in service provision during the first half of the 1980s and suggests possible avenues for improvement. The most significant chapters discuss the role of private initiative and volunteerism, welfare services to families, mothers and children, adolescents, the elderly, the disabled, delinquents, immigrants and refugees. The final chapters recommend a plan for the further development of personal social service provision in Greece. The authors of this report suggest the need for research, the improvement of education in social work, and the need to provide incentives for volunteerism.

KEPE (Centre for Planning and Economic Research). (1989). *Κοινωνική Πρόνοια, Εκθέσεις για το Πρόγραμμα 1988–1992* [Social Welfare: Reports on the 1989–1992 Plan]. Athens: KEPE.

This volume represents a second attempt by the researchers of the Greek Centre for Planning and Economic Research to evaluate specific areas of social service delivery and make recommendations for future developments. The authors of the report focus on the elderly, families, mothers and children, the disabled and the chronically ill. Although the report tries to be comprehensive it is based on little evidence and thus disappoints a social scientist. Nevertheless it can be used as an amendment to the 1985 report as it covers some areas more fully.

Wood-Ritsatakis, Anne. (1970). *An Analysis of the Health and Welfare Services in Greece*. Athens: KEPE (Centre of Planning and Economic Research).

In this book Wood-Ritsatakis discusses supply and demand for social services in Greece in 1970. After describing the administrative structure of welfare in Greece she reports on the state of personal social services to the mentally ill, the elderly and the disabled. While much of the evidence provided is sketchy, the work can be used to shed light on the historical development of personal social services.

### 3. Definition, forms and types of social services

Stathopoulos, Petros. (1995). *Κοινωνική Πρόνοια* [Social Welfare]. Athens: Hellin.

There are no serious attempts by Greek authors to systematically define the forms and types of social services in Greece. However, this work by professor of social work Stathopoulos is particularly useful for its categorisation of the various service providers in Greece, private for-profit, private nonprofit, public and religious. The author provides standard explanations for the existing distinctions among providers. Stathopoulos also categorises social groups in particular need of personal social services, based on the standard categories used by the Greek Ministry of Health and Welfare.

### 4. Organisational aspects, forms, ownership, and auspices of provider

Pelleni-Papageorgiou, Anthi. (1993). *Το Ίδρυμα Ιδιωτικού Δικαίου* [The Private Sector Foundation]. Athens: Sakoulas.

This is one of the most comprehensive attempts to define the role of private foundations in Greece. While written by a legal expert the book can be easily read by a social scientist. The book provides an excellent account of the notion of a public good foundation in Greece and describes their legal rights, privileges and obligations. The author also alludes to the most common functions served by such foundations and even provides data on the numbers of public service foundations established over the past few decades.

Kaloutsi, Aspasia. (1982). Σύγχρονα Προγράμματα Κοινωνικών Υπηρεσιών: Αρχές-Έννοιες. Αναφορά στον Ελληνικό Χώρο [Modern Social Services: Principles, Terms, Reference to Greece]. Eklogi, August, 75-93.

This short article provides a succinct and accurate description of the types of social service providers in Greece and of the kinds of services provided. The article discusses both the legally possible organisational forms of service provision as well as the private-public divide.

### 5. Financing

Tatsos, Nikos. (1993). Η Χρηματοδότηση του Κοινωνικού Κράτους [The Financing of the Welfare State]. In *Κοινωνικό Κράτος και Κοινωνική Πολιτική* [Social State and Social Policies]. Panayiotis Getimis and Dionisis Gravaris, editors. Athens: Themelio.

This chapter discusses basic data on the financing of the Greek social security system. The author concludes that compared to other European countries, until

1992 the Greek system of social security received a greater percentage of its financing directly from the state. The author is however inconclusive about the advantages and disadvantages of the alternative forms of financing, and does not examine the financing of personal social services.

KEPE (Centre for Planning and Economic Research). (1985). *Κοινωνική Πρόνοια, Εκθέσεις για το Πρόγραμμα 1983-1987* [Social Welfare: Reports on the 1983–1987 Plan]. Athens: KEPE.

This work is particularly important for its discussion of nonprofit social service providers. The authors suggest that a very significant number of social service providers are private nonprofits and that a significant portion of the funding for those providers does not come from the state. While the specific data provided by this report is outdated, the overall picture of social service provision in Greece depicted here remains unchanged.

## 6. Staff and volunteers

Panteion Panepistimio. (1997). *Ελληνικές Εθελοντικές Οργανώσεις* [Greek Voluntary Organisations], edited by O. Stasinopoulou. Athens: mimeo.

This is the only significant attempt by Greek researchers to count the number of Greek voluntary organisations and understand the character of volunteerism in Greece. Although the study was never brought to full completion and has thus not counted all voluntary organisations in Greece, it resulted in the creation of the first database on voluntary organisations. The questionnaire employed in this survey of organisations included numerous questions on the training, working hours and socio-economic status of volunteers in Greece. Unfortunately no publication has followed this study, thus researchers must request materials from the Panteion University of Social Sciences in Athens.

## 7. Efficiency, effectiveness and equity of social service provision and financing

Symeonidou, Haris. (1997). „Social Protection in Contemporary Greece.“ Pp. 67-86 in *Southern European Welfare States: Between Crisis and Reform*, edited by Martin Rhodes. London: Frank Cass.

This article provides a critical overview of social protection in Greece. The author posits that social welfare is distributed unevenly due to the lack of a rational system of administration and the absence of co-ordination between welfare providers. The author reviews major developments in key areas of welfare and suggests that the future of Greek welfare lies in a mixed economy of welfare that would allow greater interaction between the formal and informal welfare sectors.

Karadinos, D, Maratou-Alipradi, L. and Fronimou, E., editors. (1996). *Διαστάσεις του Κοινωνικού Αποκλεισμού, Κύρια Θέματα και Προσδιορισμός Προτεραιοτήτων Πολιτικής* [Dimensions of Social Exclusion: Main Issues and Setting of Policy Priorities], 2 vols. Athens: EKKE.

The authors of this volume provide in-depth assessments of the state of care in various areas of welfare. Thus services toward immigrants, children, the elderly, etc. are evaluated and in most cases increased spending is recommended. The authors also often point to the need to fight social prejudice toward underprivileged and socially excluded groups.

## 8. Innovation and change

Stathopoulos, Peter. (1996). "Greece: What Future for the Welfare State." Pp. 136-155 in *European Welfare Policy: Squaring the Welfare Circle*, edited by George, V. and Taylor-Gooby, P. England: Macmillan Press.

In this article Stathopoulos traces recent changes in the Greek welfare state and in social services in particular. The author notes that overall the development of the welfare sector has been slow and unpredictable. Welfare spending finally took off during the period of low economic growth rates in the 1980s. Unfortunately, although it increased spending the government of PASOK which ruled throughout the period maintained the pre-existing inefficiencies of the state bureaucracy and led the country into further economic recession. Thus despite improvements much remains to be accomplished in most areas of welfare provision.

## 9. European Union and globalisation issues

Ferrera, Maurizio. (1996). "The 'Southern Model' of Welfare in Social Europe". *Journal of European Social Policy*, 6 (1): 17-37.

Ferrera discusses the similarities and differences between Southern European welfare states and provides a frequently cited definition of the Southern European welfare model. Ferrara suggests that the Greek, Italian, Spanish and Portuguese welfare states are highly fragmented and corporatist with the exception of health care, and that they are minimally involved in welfare and still carry the curse of clientelistic party practices. Due to their character, Ferrara argues, Southern European welfare states will be severely challenged by European Unification.

## 10. Bureaucratisation and/or commercialisation problems

Petmesidou, Maria. (1992). *Κοινωνικές Ανισότητες και Κοινωνική Πολιτική* [Social Inequalities and Social Policy]. Athens: Exantas.

Petmesidou argues throughout this volume that the organisational inefficiency of the Greek state makes it vulnerable to class and party interests. Her argument stands on a long tradition of Greek literature on this topic, which has established that bureaucratisation and effective administration have not coincided in the Greek context.

Symeonidou, Haris. (1997). „Social Protection in Contemporary Greece.“ Pp. 67-86 in *Southern European Welfare States: Between Crisis and Reform*, edited by Rhodes, Martin. London: Frank Cass.

Symeonidou suggests that the primary reason for the ineffectiveness of the Greek welfare state has been its lack of co-ordination and administrative rationalisation.

## 11. Comparative, cross-national issues

Stassinopoulou, Olga. (1996). “Voluntary Care in a Mixed Economy of Welfare: Present Trends – Future Prospects.” *Review of Decentralisation, Local Government and Regional Development*, 4: 64-73.

Stassinopoulou uses the public-private mix in Greek welfare as an illustration of the effect of international trends on Greek welfare. The author describes the increasing role of voluntary organisations in Greece as well as in Eastern and Continental Europe. She argues that the private-public dichotomy creates problems for our understanding of modern welfare developments. The European Union, apart from affecting social welfare policies, has also directly affected the development of the voluntary sector and thus helped to further blur the line between public and private providers.

### C. Special Fields

#### Child and Youth Welfare, Family Services

Papadopoulos, Theodore. (1996). “‘Family’, State and Social Policy for Children in Greece”. In *Children in Families: Research and Policy*. Brannen, Julia and O’Brien, Margaret (eds.). London: Falmer Press.

In this article Papadopoulos examines important aspects of social policy toward families in Greece. The article reviews recent legislation and measures for the protection of families and children and provides comparisons with other European countries. The author points toward the continuing significance of families for the protection of children in Greece.

Zilides, Christos. (1990). Η Κοινωνική Προστασία του παιδιού στην Ελλάδα [The Protection of Children in Greece]. *Social Work*, 20: 221-241.

This article reviews services currently available to children in Greece. The author

divides his discussion into services for abandoned children or orphans, children with mental and physical disabilities, and children of working mothers. In each of these areas the author reports on existing institutions and the quality of care. He concludes that overall, care is of low quality and that more providers are needed. He also notes that most services are provided by the philanthropic sector and that the state can significantly contribute to the improvement of the current level of care.

## Health care related social services, convalescence and rehabilitation

Amera, Anna. (1996). „Χρονίως Πάσχοντες και Κοινωνικός Αποκλεισμός [Chronically Disabled and Social Exclusion]. In *Διαστάσεις του Κοινωνικού Αποκλεισμού: Κύρια Θέματα και Προσδιορισμός των Προτεραιοτήτων Πολιτικής* [Dimensions of Social Exclusion: Main Issues and Setting of Policy Priorities], edited by Karadinos, D.; Maratou-Alipradi, L. and Fronimou, E. Athens: EKKE.

Drawing on a household survey, this chapter describes the characteristics of the chronically ill and disabled in Greece, the types of problems they face and the care they receive. The author finds that most of the elderly in the study suffered from social exclusion due to abandonment, lack of care and poor resources.

Fakiolas, N., Styliaras, G. and Moula, K. (1996). “Ο Κοινωνικός Αποκλεισμός των Απεξαρτημένων Ατόμων» [De-addicted Persons and Social Exclusion]. In *Διαστάσεις του Κοινωνικού Αποκλεισμού: Κύρια Θέματα και Προσδιορισμός των Προτεραιοτήτων Πολιτικής* [Dimensions of Social Exclusion: Main Issues and Setting of Policy Priorities], edited by Karadinos, D. Maratou-Alipradi, L. and Fronimou, E.. Athens: EKKE.

The authors of this chapter attempt a rare examination of the problems facing recovered substance abusers when they re-enter society, including difficulties in continuing education and finding housing and work. This chapter also provides the reader with a well researched list of the most important rehabilitation centres in Greece and the services they provide.

## Disabled

Kassotakis, Mihalis; Papapetrou, Savas and Fakiolas, Nikos. (1996). Φραγμοί στην Εκπαίδευση και την Επαγγελματική Αποκατάσταση των Ατόμων με Ειδικές Ανάγκες [Limits in the Education and Professional Choices of the Handicapped in Greece]. In *Διαστάσεις του Κοινωνικού Αποκλεισμού, Κύρια Θέματα και Προσδιορισμός Προτεραιοτήτων Πολιτικής* [Dimensions of Social Exclusion: Main Issues and Setting of Policy Priorities], edited by Karadinos, D. Maratou-Alipradi, L. and Fronimou, E.. Athens: EKKE.

In this chapter the authors explore the relationship between social exclusion and the lack of appropriate education for the disabled in Greece. The quality of education currently offered by the state is evaluated at all levels and recommendations are made for its improvement. Specifically, the authors suggest that emphasis be put on preparing disabled persons for the workplace.

Stasinou, Dimitris. (1991). *Η Ειδική Εκπαίδευση στην Ελλάδα* [Special Education in Greece]. Athens: Gutenberg.

The goal of this work is to provide a thorough historical account of the rise of social service providers dealing with the mentally and physically disabled in Greece. In doing so, the author also documents key providers of the past and present. The work is well researched and contains many useful citations. Stasinou makes a point of distinguishing state developments from developments in the private and philanthropic sectors in each historical period. Overall, his account suggests that the most crucial part in service provision has been played by nonprofit organisations supported by parent associations or great philanthropists and intellectuals.

Matinopoulou-Perri, Ipatia. (1984). “Μονάδες Ανοικτής Περίθαλψης και Αγωγής για Παιδιά και Νέους με Ειδικές Ανάγκες στο Εκατοπέδιο Αττικής”. *Εκλογή*, April: 35-57.

Although this is a rather outdated review of social service providers for disabled children and youth in the Athens area, most of the providers mentioned in this discussion still exist today and the total numbers of service users reported have changed very little since 1984. The author describes the services provided by various types of institutions, from schooling and job training to shelters for the chronically disabled.

## Immigrants and refugees

Maratou-Alipranti, L. 1996. “Foreign Labour Force: Trends and the Problem of Social Integration”. In *Διαστάσεις του Κοινωνικού Αποκλεισμού, Κόρια Θέματα και Προσδιορισμός Προτεραιοτήτων Πολιτικής* [Dimensions of Social Exclusion: Main Issues and Setting of Policy Priorities], edited by Karadinos, D., Maratou-Alipranti, L. and Fronimou, E.. Athens: EKKE.

In this chapter Alipranti analyses current trends in Greek immigration and foreign worker participation in the Greek labour force. The conditions facing immigrants in the workplace are reviewed and recent policies and services developed to face the new situation are described.

## **D. Summary assessment of current debates in the field**

The study of personal social services has only recently become an academic endeavour in Greece, thus there are many unexplored areas and gaps to be filled in the years to come. Existing literature seems to build on previous works on the welfare state focusing primarily on health and social security. Increasingly, however, the provision of personal services is publicly demanded and politically debated.

The most significant debate at the moment seems to be concerned with the role of the state in the provision of social services. Traditionally, personal social services were provided primarily by families, women, charitable institutions and community associations. Over the past few decades the state has been funding those private initiative providers and has even founded some of its own service providers. The current trend is toward an overall increase in services provided both by the state and by nonprofit organisations. Still, many of the authors whose works were cited in this bibliography suggest that quality of social services will not increase unless co-ordination and co-operation between all the different sectors involved in provision prevails. Moreover, this co-ordination must be based on a rationalised administrative structure that will remain immune from political struggles.

# Ireland

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## A. Synopsis of Social Service System

Social services in Ireland are generally taken to mean income maintenance, housing, education, health, welfare and personal social services (Curry 1998). According to Curry (1998: 4) social services “are availed of by practically everyone in Irish society”. This bibliography focuses on housing, welfare and personal services. Much of the housing stock is provided or subsidised by the state, while voluntary or nonprofit providers play a very significant role in welfare and personal social services.

Historically, social service provision of different kinds has been the responsibility of nonprofit or voluntary organisations, but in the past fifty years or so government support has increased significantly and statutory provision of social services has dramatically improved (Faughnan and Kelleher 1993). Thus while nonprofit organisations play a dominant role in the provision of welfare and personal social services, many depend on government aid in order to deliver these services.

Just under half of government spending is on social services, a major portion of that taken up by income maintenance. Government is directly involved in providing housing and also supports nonprofit provision in this area through several Housing Acts (1962, 1988, 1992). In personal and welfare social services, as Curry (1998) has noted, government spending tends to be subsumed under separate areas and is difficult to identify. The most common form of government spending in these areas tends to be s.65 and s.10 grants. The former were legislated under the 1953 Health Act and are for ‘services ancillary or similar’ to those provided by the state, while the latter was legislated under the 1991 Childcare Act and apply specifically to childcare provision, previously funded through s.65. The Department of the Environment and the regional Local Authorities are responsible for housing, while s.65 and s.10 grants are administered through the regional health authorities, called health boards.

With the era of social partnership in the 1990s, the developing relationship between social service providers entered a new phase. An important example is the establishment of Area-Based Partnership companies in 1991 under the Programme for Economic and Social Progress. These ABPs, whose number grew from twelve to thirty-eight by 1996, combat unemployment (specifically long-term unemployment) in designated disadvantaged areas. They are funded through Area Development Management Ltd, mainly in the form of EU monies

(Global Grant) and some central government funding (from the Department of Tourism, Sport and Recreation). The ABPs' function is due to change in 2000, with for example the Local Employment Services being 'farmed out' to a separate provider. The literature indicates that social service provision of different kinds has been affected by partnership of different kinds (Crowley 1996). Another important example is the link between social services and community development in Ireland. Community organisations may provide services for substance abusers, lone parents, children, youth and the unemployed while at the same time adopting an advocacy role.

Legislation on social service provision in Ireland includes the Housing Acts (1962, 1988, 1992), Health Care Acts (1953, 1970), the Nursing Homes Act (1991), and the Childcare Act (1991). Instrumental government programmes include the Programme for Economic and Social Progress, the Programme for Competitiveness and Work and Partnership 2000. Other policies linking social policy and social service provision include the Years Ahead (1988), the National Anti-Poverty Strategy (1997), and forums such as the NESC, the NESF and the Forum on People with Disabilities, various national development plans and statutory agencies such as Combat Poverty, FAS and the National Social Service Board. The most recent example is the Integrated Services Process piloted in four areas of the country (three in Dublin and one in Cork), which aims to facilitate the integration of all social service provision within a geographical area in order to enhance social inclusion. It is anticipated that ISP will inform future approaches on social inclusion measures (National Development Plan 2000-2006).

## **B. Annotated Bibliography**

### **1. Comprehensive works, overview volumes, classics on social services and the welfare system**

Quin, Suzanne, Kennedy, Patricia; O'Donnell, Anne and Kiely, Gabriel (eds.) 1999. *Contemporary Irish Social Policy*. Dublin: University College Dublin Press. This textbook on social policy in Ireland provides a good overview of social service provision in a time of socio-economic growth. The authors note, for example, the decline in power of the Catholic Church as both an influence on ideology and practice and as a service provider. Chapters cover many social services areas, providing overall a useful guide to social service provision in Ireland at the turn of the 20th Century.

Curry, John. 1998. *Irish Social Services*. Dublin: Institute of Public Administration.

The third edition of a book published in 1980 and 1993, this is an important start-

ing point for anyone seeking information on the social services and social policy in Ireland. While Curry acknowledges that none of the key social services are covered in depth, a bibliography is provided and a very useful overview of major developments is given. An introductory chapter discusses social policy and social service provision generally in the context of a changing Ireland and increasing interest in social policy. The remaining chapters examine income maintenance, housing, education, health and welfare services.

Healy, Sean and Reynolds, Brigid (eds.) 1998. *Social Policy in Ireland: Principles, Practice and Problems*. Dublin: Oak Tree Press.

In *Social Policy in Ireland*, key scholars and commentators discuss many social service areas, presenting an important critique of modern Ireland. Of particular interest are chapters on poverty and housing. Callan and Nolan present findings from a survey on poverty and relate them to the social policy climate of Partnership 2000 and the National Anti-Poverty Strategy. Fahey notes that the state has supported all kinds of housing but that a policy bias in favour of owner-occupation has led to social and spatial segregation. He argues that government's stated desire to tackle social exclusion must include the social dimensions of housing.

Blackwell, John. 1995. *Reason and Reform: Studies in Social Policy*. Dublin: Institute of Public Administration.

This book draws together the main writings of John Blackwell and focuses specifically on older people, housing and family income. While the writings stem from a time when Ireland was a poorer country, many of the problems Blackwell identified remain the same today – for example the dearth of data on the homeless, and the widening inequalities in housing provision, a situation that has worsened in recent years. This is an important book to set current social service provision in its historical and policy context.

## 2. Supply and demand

Curry, John. 1998. *Irish Social Services*. Dublin: Institute of Public Administration.

Curry's examination of social service provision including income maintenance, housing, education, health services and welfare services provides a useful guide to the supply of social services in Ireland. A bibliography is provided for each chapter to direct the reader to other areas of interest. This is a useful overview of social services in the context of a changing Ireland.

Storey, David. 1994. 'The Spatial Distribution of Education and Health and Welfare Facilities in Rural Ireland.' *Administration* 42 (3): 246-268.

Focusing on a region in south-west Ireland, this paper examines the spatial inequalities of social service provision. Taking as its premise the effect of inequality on users' quality of life, the article presents data on education provision from primary through tertiary levels, and healthcare in both institutional and non-institutional settings. Alongside statutory provision, for example through the Southern Health Board's Community Care Programme, Story also examines provision by voluntary groups and their spatial distribution. He argues that the rationalisation and centralisation of health and educational services has increased inequality and inequity of access. While he counters that the overall quality of services may have improved, unequal access has a greater effect on users and influences the overall effectiveness of the service.

### **3. Definition, forms and types of social services**

Curry, John. 1998. *Irish Social Services*. Dublin: Institute of Public Administration.

Curry's examination of social service provision including income maintenance, housing, education, health services and welfare services provide a useful guide to the supply of social services in Ireland. A bibliography is provided for each chapter to direct the reader to other areas of interest. This is a useful overview of social services in the context of a changing Ireland.

O'Shea, Eamon. 1996. 'Rural Poverty and Social Services Provision' Pp. 211-245 In Curtin, Chris, Haase, Trutz and Tovey, Hilary (eds.) *Poverty in Rural Ireland*. Dublin: Combat Poverty/Oak Tree Press.

O'Shea's chapter examines the relationship between social services provision and rural poverty, investigating whether such provision alleviates or reinforces poverty and social exclusion. Although the main focus is on equity of provision (see below), O'Shea also provides a definition of social services in Ireland and notes the main types of provision. He elaborates on the main types of social services, discusses their availability in rural areas, and suggests improvements in social service provision in such areas.

### **4. Organisational aspects, forms, ownership, and auspices of provider**

Coyle, Carmel. 1996. 'Local and Regional Administrative Structures and Rural Poverty' Pp 275-305 In Curtin, Chris, Haase, Trutz and Tovey, Hilary (eds.) *Poverty in Rural Ireland*. Dublin: Combat Poverty/Oak Tree Press.

This chapter examines the role of local and regional administration in Ireland in the context of current social partnerships. Partnerships both at local level and in the negotiation of social and economic policy are widely accepted in Ireland as

core policy instruments. Coyle examines the organisation of local administrative structures in the delivery of social services such as housing. The chapter also provides a useful overview of administrative arrangements and organisational aspects of both local and rural development, in which social service provision plays a vital part.

Walsh, Jim; Craig, Sarah and McCafferty, Des. 1998. *Local Partnerships for Social Inclusion?* Dublin: Combat Poverty Agency/Oak Tree Press.

This report examines the role of local partnerships in promoting social inclusion in Ireland. The local partnership model in Ireland has been significant in the 1990s, receiving support from various governments over the decade. The era of social partnership has also enhanced welfare services through local co-ordination and delivery. This report examines not only the concept of local partnership but also how it has been practised in three geographical areas in Ireland. The three case studies focus on representation, decision-making procedures, working methods and links with other agencies and programmes. Recommendations are made about how these bodies can become more effective not only in the work that they do but also in their input to social policy.

Haslett, Deirdre; Ruddle, Helen and Hennessy, Geraldine. 1998. *The Future Organisation of the Home Help Service in Ireland.* Dublin: National Council on Ageing and Older People.

The home help service in Ireland is provided primarily by nonprofit organisations, while receiving substantial funding from the health boards (the regional health authorities). This report, based on an extensive review of the home help service in Ireland, argues that there are three main areas that need to be addressed in order to improve future home help provision: policy, practice and the organisation of the service. The report notes the important role played by the home help service in community care in Ireland and recommends it be supported and financed to improve the status of the elderly in the community and at home.

O'Hara, Patricia. 1998. *Action on the Ground. Models of Practice in Rural Development.* Galway: Irish Rural Link.

In this report O'Hara examines good practice models of local development in Ireland and Europe. The groups she chooses in Ireland provide a variety of services, such as crèche facilities, care for older people, recreational facilities for younger people, transport and housing for older people, personal development and training services for women. O'Hara highlights a number of core organisational characteristics of the chosen organisations and identifies a number of key factors contributing to their success in locally-based service development and delivery.

Community Workers' Co-operative. 1996. *Partnership in Action.* Galway: Community Workers' Co-operative.

The link between social services and community development is quite strong in Ireland due to the prevalence of the partnership model as a method of addressing disadvantage and poverty. This book examines partnership and the role of community development in light of the relationship between the voluntary and community sector and the state. It examines partnership as a means of targeting disadvantage and poverty, and the role of community organisations in that process. The conclusion of the book is that there is need for an inclusive, participatory model of partnership that is useful not only in social services delivery but also in setting social policies. Of specific interest is the chapter by Crowley on models of partnership, and the chapter by Varley and Ruddy on the interaction between the state and community groups in a project in the west of Ireland.

## 5. Financing

O'Shea, Eamon and Hughes, Jenny. 1998. 'Funding Long-Term Care in Ireland.' *Administration* 46 (1): 55-70.

The growing proportion of older people in Ireland, while still smaller than in most of Europe, is gaining increasing attention not least because of the implications for social service provision. In this paper, O'Shea and Hughes look at the gap between the needs of dependent elderly people and current service provision. They explore different ways of financing long-term care, starting with an overview of long-stay residential facilities for older people, the cost of care and current finance arrangements. They then turn to the social economy and its potential to address social care problems such as community nursing services and expanded home help services. Alternative forms of financing such as home income and home equity schemes are suggested as innovative ways of addressing this future need.

Fahey, Tony and FitzGerald, John 1997. *Welfare Implications of Demographic Trends*. Dublin: Combat Poverty Agency/Oak Tree Press.

This report addresses the ageing population and shift in the demographic structure of Ireland and the potential increase in demand for social services. The authors argue that although Ireland's population is getting older, demographic shifts such as a reduction in the number of children and an increase in the number of women active in the labour market mean that the size of the dependent population may not alter significantly. Consequently the state will have more resources to address demands for social services by the elderly.

Blackwell, John, O'Shea, Eamon, Moane, Geraldine and Murray, Peter. 1992. *Care Provision and Cost Measurement: Dependent Elderly People at Home and in Geriatric Hospitals*. Dublin: Economic and Social Research Institute.

The authors examine community care for dependent older people by comparing

the costs of care in long-stay institutions with care in the community. They note the differences in provision of community care across the eight health boards in the country as well as the inadequacy of resources in paramedical services. They conclude with a number of policy issues such as strengthening the role of assessment and rehabilitation, developing individually-tailored care packages for vulnerable older people, and using public health nurses and social workers as liaison points between older people and the medical and professional services.

Cousins, Mel. 1994. 'Social Security and Informal Caring – An Irish Perspective.' *Administration* 42 (1): 25-46.

Cousins examines social security support policies for informal carers in Ireland. Noting both the demographic context and the ageing population, he provides an overview of the policy context and the provision of institutional and community care services. He presents the historical development of carers' allowances and then focuses on relevant policy issues. He argues that the current allowance has the effect of gendering or maintaining the gendered division of care, and that a social security-based scheme would be of greater value and flexibility.

## 6. Staff and volunteers

Ruddle, Helen and Mulvihill, Ray. 1999. *Reaching Out: Charitable Giving and Volunteering in the Republic of Ireland*. Dublin: National College of Ireland.

This report, the third in a series, presents findings of a survey of people's behaviour in individual giving and voluntary work. Social services emerges as the second most important area where volunteers are located, and as the most important area for charitable donations. The authors note the potential for volunteering to be increased, with important effects on services provided.

Ruddle, Helen and Donoghue, Freda. 1995. *The Organisation of Volunteering*. Dublin: National College of Ireland.

Part of a pan-European study, this report explores voluntary work from the perspective of the voluntary organisation and specifically social service providers. It offers a profile of organisations based on their type, age, client groups and area of work. It presents the types of jobs volunteers perform, and the recruitment procedures and organisational support volunteers receive. It discusses perceptions of the effectiveness of voluntary work in the light of the services delivered and key advantages and disadvantages of using volunteers. The authors conclude that the management of volunteers is a crucial issue that has not been properly addressed. They argue that the under-utilisation of volunteers and the funding of organisations need to be critically examined and addressed to improve the effectiveness of both volunteers and social service organisations.

## 7. Clients, users, and consumer issues, profiles

Ralaheen Ltd. 1999. *Information Provision at Local Level: Developing an Integrated Approach*. Working Paper. Dublin: National Social Service Board.

This paper presents findings from a study of the lack of integration within and between various government departments and statutory agencies that deliver social services. The study is presented from the perspective of the social services client. It finds a range of information services featuring overlap between the services provided. There was little inter-agency co-operation or flexibility with regard to hours of operation, and little planned or systematic cross referral between agencies. Disability awareness was also found to be low. The report argues that ineffective and inefficient service affects client use of and access to social services.

Browne, Michael. 1999. *Citizens' Information: Theory, Current Practice and Future Challenge*. Dublin: National Social Service Board.

The NSSB, which commissioned this study, promotes and supports the development of independent information, advice and advocacy services throughout Ireland. This report analyses the key components of effective information in the context of current provision and practice in Ireland. Browne found that there is need to provide information services in a more co-ordinated and integrated approach in which users' needs are central. He highlights a number of issues such how to make information more interactive, the delivery of information through a 'bottom-up' approach, and the need to target particular groups such as the disadvantaged. He relates these issues not only to the more effective use of social services but also to more effective feedback on social policy, which contributes to active citizenship and participatory democracy.

## 8. Efficiency, effectiveness and equity of social service provision and financing

O'Shea, Eamon. 1996. 'Rural Poverty and Social Services Provision' Pp. 211-245. In Curtin, Chris, Haase, Trutz and Tovey, Hilary (eds.) *Poverty in Rural Ireland*. Dublin: Combat Poverty/Oak Tree Press.

O'Shea's chapter examines the relationship between social services provision and rural poverty, investigating whether such provision alleviates or reinforces poverty and social exclusion. He suggests that equity in social services provision needs to be given the same attention as efficiency when decisions about resource allocation are made. Analysing differences in social services provision in rural and urban areas, O'Shea argues that access to provision is crucial for rural dwellers. He asserts that flexibility and innovation are critical in such provision, concluding that for real change to occur a radical reassessment of the weighting attached to efficiency and equity in the spatial allocation of social services is necessary.

Ruddle, Helen, Donoghue, Freda and Mulvihill, Ray. 1997. *The Years Ahead Report: A Review of the Implementation of its Recommendations*. Dublin: National Council on Ageing and Older People.

The national policy for older people, *The Years Ahead*, was published in 1988 and made over 100 key recommendations for improving service provision for the elderly. This review, published almost ten years later, provides extensive examination of each recommendation at local, regional and national levels. It also provides an important overview of the current state of social care for older people, examining the organisation of care structures; care at home, in the community, in hospitals and long-stay institutions; housing, partnership, and the role of voluntary service providers. The authors conclude by examining whether the current care of older people is comprehensive, equitable, flexible and co-ordinated. They recommend that future policy and social service provision need to include to voice of older consumers rather than treating them as passive recipients of such provision.

O'Mahony, Ann. 1985. *Social Need and Provision of Social Service in Rural Areas: A Case Study for the Community Care Services*. Dublin: The Agricultural Institute.

Described as a 'seminal' study by some reviewers, this somewhat dated report illuminates social service provision and unmet needs in rural areas – many of which continue to exist today. For example, O'Mahony refers to implications of increasing urbanisation and rural depopulation, problems that have worsened since her report was published. She argues that the centralisation of many social services and the inadequate provision of public transport have led to inequity in social service provision for people in isolated rural areas.

## 9. Patterns of relations among providers

Faughnan, Pauline and Kelleher, Patricia. 1993. *The Voluntary Sector and the State*. Dublin: Conference of Major Religious Superiors/Community Action Network.

The voluntary sector has long been recognised as the major player in social service provision in Ireland, in many instances even considered synonymous with the social services. In this study Faughnan and Kelleher examine the relationship between the voluntary sector and the state in social service provision. Among other issues, they examine the characteristics of voluntary organisations, funding, staffing and the administrative and organisational frameworks necessary for the relationship between the state and the sector. They conclude that a preoccupation with funding has tended to constrain the sector's development. This can be compounded by a lack of contractual arrangements with the state and by the absence of policy frameworks. They point to the need for a comprehensive policy for the voluntary sector to promote effectiveness and recognition of their services.

Mulvihill, Ray. 1993. *Voluntary-Statutory Partnerships in the Care of the Elderly*. Dublin: National Council for the Elderly.

Drawing on a survey of voluntary organisations providing social services to older people, Mulvihill examines whether partnership exists between the state and the voluntary sector. He posits four models of partnership, taken from the literature, and examines these in light of the services provided by Irish voluntary organisations, their funding patterns, staffing and models of co-operation and dialogue with the state. He argues that there is a need for better contractual arrangements and for partnership that involves meaningful and equal input from both sides of the relationship.

O'Sullivan, Tim. 1994. 'The Voluntary-Statutory Relationship in the Health Services.' *Administration* 42 (1): 3-24.

This paper examines voluntary-statutory relationships in Ireland. The author argues that voluntary and statutory organisations complement each other both in structure and purpose. He suggests that planned development of the voluntary sector needs to occur because of its pivotal role in the provision of social services in Ireland. Drawing on interviews with both sides of the voluntary-statutory relationship, he notes that state funding of voluntary organisations is high and can create problems for both sides. For the state there may be problems with variations in standards and monitoring. For voluntary organisations there are problems with funding delays and in clarifying roles. O'Sullivan argues that both sectors need appropriate structures and ways of working together.

Jaffro, Gwen. 1996. 'The Changing Nature of Irish Voluntary Social Service Organisations.' *International Journal of Public Sector Management* 9 (7): 45-59.

This paper examines the nature of voluntary social service organisations in Ireland and their changing relationship with the state. Jaffro notes the predominance of voluntary providers in the social services and the lack of a regulatory framework for the sector. Examining the historical development, legal context, funding and staffing of voluntary organisations, she argues that their relationship with the state has 'tightened' and that the dominant partnership model has consequences for the future types of contractual arrangements.

Powell, Fred and Guerin, Donal. 1997. *Civil Society and Social Policy*. Dublin: A & A Farmar.

While this book addresses the wider issue of civil society its focus is the voluntary sector. Drawing on a survey of voluntary organisations the authors examine their client groups, their age and the reasons they were established. The authors also examine patterns of voluntarism among the population. They argue that the increasing dependence of voluntary organisations on state funding will challenge the future relationship between the two sectors and the voluntary sector's ability to respond to social need and demands.

## 10. Innovation and change

Fahey, Tony. 1995. *Health and Social Care Implications of Population Ageing in Ireland, 1991-2011*. Dublin: National Council for the Elderly.

This report places the ageing population of Ireland in an international context and questions the need for increased health and social service provision for the elderly. The older population in Ireland is examined in detail and population projections are made within the context of current health and social care provision. The implications of demographic change are addressed and Fahey concludes by noting the associated importance of health and social gain. He argues for health planners to add demographic measures to the usual indicators of health status, such as morbidity and dependency, so that future health and social care provision keeps abreast of need.

## 11. European Union and globalisation

Larragy, Joe. 1998. 'The Welfare Mix Typology and the Evolution of Negotiated Governance', in O'Donnell, Rory and Larragy, Joe (eds.) *Negotiated Economic and Social Governance and European Integration*, Proceedings from COST A7 Workshop, Dublin.

This paper examines the concept of pluralism and supports the worth of exploring pluralism both at the level of service provision and at the level of governance. Larragy identifies the major actors at both levels, namely the state, family, market and public space. He argues that the typology he posits is simple but very useful because, at a time of economic instability, questions arise not only about welfare mix but also about appropriate models for governance. Larragy concludes by identifying future trends such as global changes in technology, changing labour force participation, and the role of the EU, which will effect pluralism at both levels. He argues that negotiated governance will probably become increasingly important.

Nolan, Brian. 1994. 'The EC and Combating Poverty' in Nolan, Brian and Callan, Tim (eds.) *Poverty and Policy in Ireland*. Dublin: Gill and Macmillan.

In this paper Nolan examines the influence of the EU on poverty programmes in Ireland. He provides an overview of programmes to combat poverty and suggests that action at the EU level is necessary to address the causes of poverty. He details some of the research produced as a component of various EU Poverty Programmes, and also looks at the use of Structural Funds to combat poverty in Ireland. He argues that expenditure would be better targeted towards identifiable marginalised groups such as school drop-outs and the long-term unemployed. He also argues for an explicit goal of combating poverty and social exclusion, which in fact occurred through the National Anti-Poverty Strategy in 1997 several years after publication of his book.

## 12. Comparative, cross-national issues

Brown, Sally. 1996. 'Developments in community care for Elderly People' *Administration* 44 (3): 70-86.

This paper compares community care for older people in Ireland, England and Wales. The author pays particular attention to the organisation and structures of service delivery against the background of the main policy developments from the 1960s onwards. Browns notes that the role of the voluntary sector is far greater in Ireland than in England and Wales. She points toward the development of partnerships in Ireland and also the potential problem of long-term care provision due to the decreasing size of families and the increasing trend for more women to participate in the labour market.

Larragy, Joe. 1996. 'Families and Voluntary Bodies in a Mixed Economy of Welfare – a Perspective on the Irish Case' Pp. 193-216 In Alestalo, M. and Kosonen, P. (eds.) *Welfare Systems and European Integration*. Tampere: University of Tampere.

This paper provides an overview of the multi-faceted changes in the organisation and delivery of social services in Ireland. Larragy provides an historical view of social service provision and documents the changing relationship between the state and voluntary social service providers. He notes the declining role of the church, the increasing role of the state, and the emergence of partnerships in different forms. He argues that a pluralistic model prevails, expressed differently and more positively in Ireland compared to Britain, and that it takes shape only in a context appreciative of interdependency between social welfare providers

Gaskin, Katharine and Smith, Justin Davis. 1995. *A New Civic Europe? A Study of the Extent and Role of Volunteering*. London: The Volunteer Centre UK.

This report draws together the findings from studies of voluntary social service organisations in ten European countries. The report presents a profile of the extent and nature of volunteering in Europe, how it is organised and supported, and types of training offered to volunteers. Different client groups are profiled and issues of interest for social service organisations are raised. In Ireland, for example, the elderly are the major client group followed by the community in general and the unemployed. In comparison, the major client group in Belgium, Bulgaria, Denmark, France and Germany is young people. In Ireland as in Great Britain there is a focus on fundraising by volunteers. The study notes the importance of volunteering as a pan-European activity and points toward its further development.

### 13. Current trends and policy issues

Heanue, Kevin. 1998. 'The Affordability Gap for Housing in Peripheral Rural Areas.' *Administration* 46 (2): 47-64.

This paper focuses on access to housing in an isolated rural area in the west of Ireland. Concerned not only with housing provision by local authorities, but also with private rental and owner-occupied housing, Heanue looks at planning regulations and the demographics of the area. He considers the impact on the community and service provision, such as education, health and the decline of rural communities. He argues that a policy on population distribution is needed, and that development policy should be integrated and focused on the social and economic realities of peripheral rural areas. While many rural development initiatives are designed to keep populations in peripheral rural areas, if access to housing is thwarted the community cannot be sustained.

Duggan, Carmel. 1999. 'Locally-Based Interventions to Combat Poverty and Exclusion: How Effective can they be?' *Administration* 47 (2): 56-77.

This paper looks at Irish policy during the 1990s, when a locally-based approach to targeting interventions was adopted. The author notes the growing unanimity in policy documents regarding the specific needs of long-term unemployed, lone parents, disabled, members of the travelling community, women and disadvantaged communities. The partnership approach has been accepted as the way to address these needs. Duggan provides details of the relevant policy statements and the government department from where they were issued; local interventions since 1990, their objectives, assumptions, and government bodies and target groups. She argues that while local interventions are widely accepted as a way to tackle these issues, their effectiveness depends on their quality, recognition of their limitations, and their national level support.

Community Workers' Co-operative. 1998. *Local Development in Ireland*. Galway: Community Workers' Co-operative.

This book, comprising chapters from different contributors, addresses local development in the context of policy development. Three main themes are addressed: local governance, rural development and equality. The provision of different services at local level are examined, such as services for the elderly and the homeless. The book charts the move away from community development and toward local development, made also by policy makers. Situating current local development in a wider context of community development and local service provision, the authors make policy suggestions for future governance and development at local level in Ireland.

## C. Special Fields

### Child and Youth Welfare

Hayes, Noirin. 1996. 'Organization and Support of Childcare in Ireland.' *Irish Journal of Feminist Studies* 1(2): 4-23.

This article focuses on recent social developments and political actions to reconcile family and working life and their effects on childcare provision. Hayes focuses on services for pre-school children, which are among the poorest in Europe. She describes state, voluntary/ community and private provision and argues that childcare should be given higher priority.

Richardson, Valerie. 1999. 'Children and Social Policy.' Pp. 170-199. In Quin, Suzanne, Kennedy, Patricia, O'Donnell, Anne and Kiely, Gabriel (eds.) *Contemporary Irish Social Policy*. Dublin: University College Dublin Press.

Although concerned primarily with social policy, this chapter also places social service provision for children in its social policy context. Richardson provides a history of policy developments in relation to children from the 1880s to the present. She notes that until the early 1990s provision and policy were centred on parents' rather than children's rights.

Kennedy, Patricia. 1999. 'Irish Youth Policy.' Pp. 200-220. In Quin, Suzanne, Kennedy, Patricia, O'Donnell, Anne and Kiely, Gabriel (eds.) *Contemporary Irish Social Policy*. Dublin: University College Dublin Press.

Kennedy's chapter on youth policy provides a useful overview of the historical development of social services for young people in Ireland. She examines organisations for young people and the development of statutory involvement in the area. She discusses relevant social policy and examines its practice, including the recent partnership model. The author also provides books and articles as recommended reading as well as a long bibliography.

## Family Services

Commission on the Family. 1998. *Strengthening Families for Life*. Dublin: Stationery Office.

This is the final report of the Commission on the Family set up in 1995 to outline the parameters of family policy, present a profile of family-related issues, and analyse submissions received from the public on the family. The report contains primary research conducted on behalf of the Commission by several noted scholars and policy analysts. It also describes the various services available to families and makes recommendations for their improvement and overall effectiveness. It provides a useful report for scholars by presenting a profile of the current situation as well as recommendations for the future.

Kennedy, Finola. 1989. *Family, Economy and Government in Ireland*. Dublin: Economic and Social Research Institute.

Chapter six of this publication looks at the impact of public expenditure programmes on the family. It considers the provision of certain social services such as housing, education and health. The principle of equity, both horizontal and vertical is addressed as a key consideration.

### **Frail elderly, nursing homes, long-term care**

O'Loughlin, Anne. 1999. 'Social Policy and Older People in Ireland' Pp. 221-242. In Quin, Suzann, Kennedy, Patricia, O'Donnell, Anne and Kiely, Gabriel (eds.) *Contemporary Irish Social Policy*. Dublin: University College Dublin Press.

O'Loughlin's paper provides a comprehensive historical overview of older people in Ireland and the main policy developments for older people over the past forty years. She critically analyses social policies for the elderly and notes the role of key agencies for older people in Ireland. She concludes by addressing future challenges such as ageism, elder abuse and the issue of care in Ireland. As well as providing a chronology of the main social policy developments in this area she provides a thorough and comprehensive reference list.

Ruddle, Helen, Donoghue, Freda and Mulvihill, Ray. 1997. *The Years Ahead Report: A Review of the Implementation of its Recommendations*. Dublin: National Council on Ageing and Older People.

The national policy for older people, *The Years Ahead* was published in 1988 and made over 100 key recommendations for the improvement of service provision for older people. This review, published almost ten years later, is an exhaustive examination of each recommendation at local, regional and national levels. It also provides an important overview and examination of the current state of social care for older people: the organisation of care structures; care at home, in the community and in hospitals and long-stay institutions; housing, partnership, and the role of voluntary service providers. The authors conclude by examining the comprehensiveness, equity, flexibility and co-ordination of care for the elderly. They recommend that future policy and social service provision include the voice of older consumers rather than treating them as passive recipients of provision.

Boyle, Geraldine. 1997. 'Community Care for Older People in Ireland: A Conceptual Critique of the Literature.' *Administration* 45 (2): 44-58.

In this article, Boyle critically analyses concepts involved in community care policy on older people. She takes issue with the concept of dependency and the idea of older people as a burden. She notes that the bias in statutory financial support, which is available for long-term nursing care but not domiciliary care, contributes

to dependency. She argues that the health and welfare system has created dependency and that older people need to help set the agenda for service provision.

## Health care related social services, convalescence and rehabilitation

Haslett, Deirdre, Ruddle, Helen and Hennessy, Geraldine. 1998. *The Future Organisation of the Home Help Service in Ireland*. Dublin: National Council on Ageing and Older People.

Home help service in Ireland is provided primarily by voluntary organisations and receives the majority of funding from the health boards (the regional health authorities). This report, based on an extensive review of the home help service in Ireland, argues that there are three main areas that need to be addressed in order to improve future home help provision: policy, practice and the organisation of the service. The report notes the important role of home help service in community care in Ireland and recommends it be supported and financed in order to improve the status of older people in the community and at home.

Yeates, Nicola. 1997. 'Gender, Informal Care and Social Welfare: The Case of the Carer's Allowance', *Administration* 45 (2): 21-43.

Yeates discusses the Carers' Allowance in the context of the community care framework, the administration of other social welfare care payments, and the broader gendered structure of welfare. She provides figures on the use of certain community welfare services such as home help, meals, home nursing and day centres, and gives quite detailed description of the types of payments available to carers and individuals. Focusing on the status of carers, she argues that rather than focusing on benefit adequacy we need a review of the impact of public care systems. She suggests it is a civil rights rather than welfare rights issue, thus broadening the debate.

Ruddle, Helen and O'Connor, Joyce. 1993. *Caring without Limits?* Dublin: The Alzheimer Society of Ireland.

This study examines carers of people with dementia and Alzheimer's disease. The report investigates carers' needs and the caring role, and also looks at social services available to carers and their use of such services. The most essential services for carers are relief care, short-term residential care, support groups, day centres, transport and day hospitals. The authors argue that there are gaps in the provision of formal support services and that co-ordination of services between voluntary organisations is needed to address these gaps.

O'Connor, Joyce and Ruddle, Helen. 1988. *Caring for the Elderly Part II*, Dublin: National Council for the Aged.

In this a study of carers in the home one chapter is devoted to social services sup-

port that carer might access. It discusses the extent of such services and examines their effectiveness according to carers who have used them. The chapter looks at the provision of advice and concludes that both advice and services are not provided on any large scale to carers, and consequently the social services are not being availed by a group in need.

Whelan, B.J. and Vaughan, R. N. 1982. *The Economic and Social Circumstances of the Elderly in Ireland*. Dublin: Economic and Social Research Institute.

This report examines the living conditions of older people in Ireland, including the extent to which they use social services, both statutory and voluntary. A breakdown of people who use services is given, including household composition, income and ownership of various amenities, and quality of housing. The authors conclude that policy interventions should focus on older people living alone, who are most at risk and in need, in order to increase their quality of life.

## Disabled

Quin, Suzanne and Redmond, Bairbre. 1999. 'Moving from Needs to Rights: Social Policy for People with Disability in Ireland.' Pp. 146-169. In Quin, Suzanne, Kennedy, Patricia, O'Donnell, Anne and Kiely, Gabriel (eds.) *Contemporary Irish Social Policy*. Dublin: University College Dublin Press.

Quin and Redmond examine current social policy for people with disability, placing it in historical context. They discuss the various social services for the disabled and note the major role of voluntary organisations. This is a very useful chapter which provides an up-to-date account of policy and provision as well as recommended further reading.

Murray, Barbara and O'Carroll, Audrey. 1997. 'Out of Sight, Out of Mind? Women with Disabilities in Ireland' Pp. 494-511. In Byrne, Anne and Leonard, Madeleine (eds.) *Women and Irish Society*. Belfast: Beyond the Pale Publications.

This paper examines the hidden lives of women with disabilities, arguing that their sex and disability make them doubly invisible. Their exclusion relates not only to their position in society but also their use of services and active participation. Murray and O'Carroll present figures on education rates of disabled women, examining the situation in third level education, vocational training and employment. They argue that the situation of disabled women has not been charted by social scientists in Ireland. They raise a number of questions relating to these women's use of social services and argue that their inclusion in further research could lead to their wider inclusion in social policy and policy debates.

## Homeless, the poor, poverty

Glen/Nexus. 1995. *Poverty: Lesbians and Gay Men*. Dublin: Combat Poverty Agency.

This report is based on a study of the links between poverty and discrimination against lesbians and gay men. The research shows that discrimination and prejudice disadvantage these groups and contribute to their social exclusion. Discrimination affects their access to social services such as housing, education and health care and also contributes to their potential to become homeless. Access to gay and lesbian social services can be difficult due to spatial isolation as well as lack of financial resources. The authors call for adequate public funding of voluntary social services in order to improve effective targeting of this client population.

Silke, David. 1999. 'Housing Policy.' Pp. 49-71. In Quin, Suzanne, Kennedy, Patricia, O'Donnell, Anne and Kiely, Gabriel (eds.) *Contemporary Irish Social Policy*. Dublin: University College Dublin Press.

Silke examines the history of housing policy and provision in Ireland. The author looks at future challenges for housing including the potential partnership between statutory, voluntary and for-profit sectors in the provision of low-cost accommodation. This chapter is a useful starting point for the scholar and contains indicators and pointers as well as recommended reading and a bibliography for those interested in exploring the area further.

Daly, Mary. 1989. *Women and Poverty*. Dublin: Attic Press.

In this broader study of women and poverty Daly addresses the question of access to education, housing and legal services. She argues that improving access in these areas can reduce social inequality and improve the overall quality of life. She also provides an overview of the broader range of social services available to women, including those offered by women's groups. The book is somewhat dated but contains a sizeable reference list as a useful starting point for any scholar interested in this area.

## Unemployed

Breen, Richard. 1994. 'Poverty and Labour Market Measures' Pp. 281-292. In Nolan, Brian and Callan, Tim (eds.) *Poverty and Policy in Ireland*. Dublin: Gill and Macmillan.

Nolan and Callan's book provides a useful discussion linking various factors of poverty, including unemployment. The chapter by Breen focuses on labour market measures as direct interventions. Breen examines job creation measures

including enterprise schemes and temporary job creation schemes. He concludes that none of the measures introduced by government have reduced poverty in the long-term. He argues that job creation and training programmes need to be evaluated not only to measure both their effectiveness and cost effectiveness.

## Immigrants and Refugees

Moran, Joe. 1999. 'Refugees and Social Policy.' Pp. 266-285. In Quin, Suzanne, Kennedy, Patricia, O'Donnell, Anne and Kiely, Gabriel (eds.) *Contemporary Irish Social Policy*. Dublin: University College Dublin Press.

This chapter notes the relatively recent focus on refugees in Irish social policy and provides an historical context to explain this. Moran highlights the role of voluntary social service providers in this area, including their role in the development of relevant social policy. Such policy, Moran observes, has lacked strategic planning. However, current developments indicate that future policy will be more focused. The chapter provides a useful overview of an issue that is very topical in Ireland today and is bound to remain so. A reference list is also provided.

## D. Summary assessment of current debates in the field

Social service provision in Ireland was under the auspices of voluntary organisations for a long time. Statutory provision and statutory funding and support of voluntary providers has increased only in more recent decades. The partnership model currently prevails both in practice and as an aspiration for effective delivery. In fact as the literature on social services in Ireland shows, there is currently a preoccupation with the idea and practice of partnership. The literature also reveals the important inter-relationship between social services and community development in Ireland.

Some categories of social services in Ireland summarised above, such as unemployment, appear more under-researched than other areas but in fact overlap quite extensively. In fact, much of the literature on social services, social policy and local development take unemployment and poverty as a given and start with those implicit themes. Indeed, the literature on partnership is preoccupied with the twin 'evils' of disadvantage and unemployment. Thus, for scholars interested in poverty and unemployment it would be helpful to look at the literature on the organisation of social services and on efficiency and equity in provision of services. Other examples of overlapping categories appear in the work by Ruddle and Donoghue (1995) who deal with the definition of social service provision,

issues of interest to clients, and volunteering in Ireland; by Powell and Guerin (1997), who discuss patterns of relations between providers but also discuss volunteers; and by Ruddle et al. (1997), who link policy with service equity.

Effective financing and provision of the social services come across as key themes in the literature. The literature points to gaps in social service provision, for example in child care facilities, housing and equity across the country. The evident concern with how social service provision can be made more effective has given rise to the idea that local development and partnership are crucial to effective provision in the future. The delivery of social services and the relationships between social service providers also needs to be addressed at policy-making level. For this purpose a White Paper on voluntary activity has been promised for several years and looks likely to be released in 2000.

Overall the preoccupation with partnership has not yet given way to the concept of integration, although integration and co-ordination of services are discussed by Ruddle et al. (1997). Given the increasing use of these concepts in social policy, they will probably find their way into the literature in due course.

## Italy

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### A. Synopsis of Social Service System

Unlike other countries in the EU, Italy has not yet developed a social services system aimed at providing a universal minimum safety net of social protection for its population. In this respect Italy is similar to other Southern European countries. Moreover, the direct provision of social services in kind remains limited, accounting for around only 12% of total public expenditure on social assistance (including pension schemes, income maintenance measures and social services) in 1994.

The institutional and organisational nature of the Italian social services system is marked by the absence of a basic framework of reference in national legislation and by the considerable fragmentation of institutional responsibilities, both at central and local levels. One consequence is a lack of data and aggregate information providing reliable estimates of overall social service supply. According to available data, public spending on social services other than cash transfers amounted to 8,800 billion Lire in 1994. Of this sum a good 94% was spent by local authorities, although in the absence of guidelines or norms at a national level.

The residual and patchy character of public provision has encouraged initiatives by many private nonprofit organisations, which absorb a substantial amount of the market share. It is estimated that a good 85% of service supply is provided by nonprofit organisations, which depend on government for approximately 50% of their finance. Thus Italian social services are characterised by a partnership in which public authorities assume some responsibility for finance and private or nonprofit organisations actually provide most of the services.

The financing system gives local administrations considerable autonomy. The lack of nation-wide norms and guidelines gives budgeting responsibility to local administrations and to a lesser extent local health authorities, who can then develop services according to their own priorities. A large part of public finance is used for support of the elderly, disabled and minors in residential institutions, while so far little is spent on community-based and home care services. Most financial transactions with nonprofit private providers are on a daily fee paying basis, while only a minority of transactions are regulated by contracts.

The absence of comprehensive national legislation has favoured the development of "category" type legislation whereby funds are provided for specific categories

of beneficiaries. Thus there is national legislation on the disabled which defines the main forms of service provision (training and information services, care and rehabilitation, work integration, financial support, housing integration); legislation on substance abusers defining the types of care and rehabilitation; and legislation on minors in difficulty. Nevertheless, geographical fragmentation generally persists together with a lack of uniformity both in terms of quantity and type of services provided.

The 1998 Budget Law introduced an experimental national minimum income (i.e. state benefit) program, which currently operates in forty Italian municipalities. A permanent national programme is expected sometime after the end of the two-year trial period. This program is expected to provide Italy with a national minimum safety net that will encourage the further development and improvement of the social services system.

## **B. Annotated bibliography**

### **1. Comprehensive works, overview volumes, classics on social services and the welfare system**

Ferrera, Maurizio. 1984. *Il welfare state in Italia. Sviluppo e crisi in prospettiva comparata*. [The welfare state in Italy: growth and crisis in comparative perspective]. Bologna: Il Mulino.

Ferrera provides the most accurate and detailed reconstruction of the Italian welfare system available to date. The book is based on a considerable amount of data and information collected for the comparative research project on “Historical Indicators of Western European Democracies” directed by Peter Flora. The text reconstructs the development of the welfare system from the end of the war to the 1980’s, examining social security, health, education, housing and social services. Country-comparisons allow the author to identify which factors are specific to Italy and which are common to other European models.

Ascoli, Ugo (ed.). 1984. *Welfare state all’italiana*. [The Italian welfare state]. Bari: Laterza.

Considered one of the most complete books on the Italian welfare system, this text covers a wide range of policies: the pension system, fiscal policies, health policies, education, housing and social services. The various policies are reconstructed in terms of their historical evolution, looking closely at the political processes that characterised them, the conflicts and dilemmas that they caused and the impact that decisions had on beneficiaries. Of particular importance are: the introductory chapter by Ugo Ascoli which proposes an overall model for interpreting the Italian welfare system; the chapter by Patrizia David on social services policies;

and the concluding chapter by Massimo Paci, which points out the role of “clientelism” and political patronage in the construction of welfare policies in Italy.

Paci, Massimo. 1989. *Pubblico e privato nei moderni sistemi di welfare*. [Public and private in the modern welfare system]. Bari: Liguori.

This book provides a comparative-historical analysis of the origins and development of contemporary welfare systems. The second part of the book concentrates on the Italian case, examining the formation of the welfare state and its structural characteristics. Considerable space is given to welfare and institutional factors allowing the author to identify the dualism between public and private as a useful key to interpreting and understanding the unique aspects of the Italian welfare model. Although it does not concentrate on social services, the model proposed by the author explains many of the problems in this specific field.

Donati, Pierpaolo. 1985. “I servizi sociali in Italia: analisi degli obiettivi e orientamenti di politica sociale” [Social services in Italy: analysis of the objectives and orientations of social politics]. Pp. 323-363 In Giovanna Rossi and Pierpaolo Donati (eds.) *Welfare state. Problemi e alternative*. [Welfare state: problems and alternatives]. Milano: Angeli.

This contribution looks at the lines along which the social services system developed and focuses on crises emerging towards the end of the 1970s. The first part of Donati’s chapter separates the historical development of social services into different periods, while the second part reconstructs the extent and salient characteristics of the social services system. The last part focuses on the crisis, interpreted in terms of legitimacy and the difficult relationship between the public sector, the demands of the population and instances of what the author refers to as “vital worlds”. Although the data provided is now obsolete, the chapter proposes an original interpretation that has been used considerably in recent studies.

## 2. Supply and demand

Fargion, Valeria. 1997. *Geografia della cittadinanza sociale in Italia*. [The geography of social citizenship in Italy]. Bologna: Il Mulino.

This study presents the most complete examination of the social services policies adopted in fifteen of Italy’s twenty regions. Its importance is linked to the regional system of responsibility for legislating in the absence of national legislation. This has resulted in significant geographical differences in service provision, to the extent that it is difficult to talk of a “national” model for social services policies. The analysis of the programmes and expenditure of different regions provides a very complete picture of the Italian social services system and also contributes to the recent debate on institutional performance triggered by Putnam’s celebrated book, *Making Democracy Work* (1993).

Negri, Nicola and Saraceno, Chiara. 1996. *Le politiche contro la povertà in Italia*. [Policies against poverty in Italy]. Bologna: Il Mulino.

This book re-examines national reports for the Observatory on Policies Against Social Exclusion, set up by the EEC for the five year period 1990–1994. It reconstructs the entire range of public and private intervention aimed at the socio-economic groups hit hardest by social marginalisation, such as the poor, the unemployed and the homeless. The policies analysed concern income support, work integration, housing integration and health. The analysis furnishes both a picture of the different aspects of social exclusion in Italy and also an assessment of the effectiveness of measures implemented to counter the phenomenon. A very composite picture of the various types of intervention emerges at the end of the study, which the authors define as an “implicit policy” against social exclusion.

Kazepov, Yuri. 1996. *Le politiche locali contro l'esclusione sociale*. [Local policies to combat social exclusion]. Roma: Istituto Poligrafico dello Stato.

The book presents the results of a survey carried out for the commission for the investigation of poverty and marginalisation set up by the Presidency of the Council of Ministers (Italian cabinet). The study analysed programmes that fight social exclusion in fourteen Italian cities (including the largest). The programmes considered concerned: minimum income measures, home care services for the elderly, the homeless and minors at risk. The study documents the considerable fragmentation of these various interventions due to the absence of national legislation.

### 3. Definition, forms and types of social services

Ranci Ortigosa, Emanuele. 1990. “La politica assistenziale”. [Welfare politics]. Pp. 383-397. In Bruno Dente (ed.), *Le politiche pubbliche in Italia*. [Public policies in Italy]. Bologna: Il Mulino.

This text provides an introductory picture of the characteristics of social services policies in Italy. It first reconstructs the historical development of the social services system. After describing the general institutional structure and legislation, the main fields of intervention are reconstructed. It then considers the actors involved in policy-making and reconstructs the networks between them.

David, Patrizia. 1984. “Il sistema assistenziale in Italia”. [The system of assistance in Italy]. Pp. 185-204. In Ascoli, Ugo (ed.) *Welfare state all'italiana*. [The Italian welfare state]. Bari: Laterza.

The first part of this contribution provides an analytical reconstruction of the history of the social services system. It begins with private philanthropic forms that preceded public intervention, and finishes with the development of the modernised social services system in the 1970's and 1980's. The second part of the

chapter provides a general description of the main areas of social service interventions, identifying relevant legislation and the main types of services developed through specific programmes. The wide range of private operators in this field are also briefly described.

Ferrario, Paolo. 1995. *Politica dei servizi sociali*. [The politics of social services]. Roma: NIS.

This book shows the historical evolution of the Italian social services system and provides very useful information on its organisational and institutional structure. Particular attention is given to the distribution of responsibilities between central institutions (the state and regions) and local administrations (city councils, health local agencies, etc.). A picture of main norms and programmes in different fields is then presented, focusing on interventions for minors, the disabled, substance abusers, mental health patients and the elderly. A rich bibliography allows further investigation on more specific topics.

#### **4. Organisational aspects, forms, ownership, and auspices of provider**

Ranci Ortigosa Emanuele. 1990. "Strutture organizzative e modalità operative nei servizi sociali e sanitari. Evoluzione, tendenze, prospettive", [Organisational structure and formal operation in social services and health care. Evolution, trends and prospectives]. Pp. 129-155. In Ranci Ortigosa, Emanuele (ed.). *Welfare state e politiche sociali in Italia*. [The welfare state and social politics in Italy]. Milano: Angeli.

This text analyses the functioning and the main organisational problems of health and social services. The first part reconstructs the development of organisational models and analyses the passage from traditional institutional forms to the development of the most recent models based on community care and the free choice of service users. The second part dwells on the main organisational problems: resistance to change, assessment of the quality of services, personnel qualifications, definition of rules for access and use of services, and planning in a context characterised by the presence of many actors.

#### **5. Financing**

Istituto per la Ricerca Sociale. 1997. *La spesa pubblica per l'assistenza in Italia*. [The public cost of social assistance in Italy]. Roma: Istituto Poligrafico dello Stato. This book brings together the results of a survey carried out for the Commission for the Investigation of Poverty and Marginalisation set up by the Presidency of the Council of Ministers (Italian cabinet). The study reliably reconstructs, for the first time, the level and dynamics of welfare spending by the state and numerous

national and local bodies. The analysis also provides an estimate of welfare spending by municipalities – the public bodies most heavily involved in financing in-kind social services. Emerging from the analysis are considerable differences in spending levels between regions, and the essentially financial character of welfare programmes concentrated heavily on transfers for income support.

Fargion, Valeria. 1997. “La scatola nera dei bilanci regionali”. [The black box of the regional balance]. Pp 267-307. In Fargion, Valeria. *Geografia della cittadinanza sociale in Italia*. Bologna: Il Mulino.

Fargion provides a detailed description of spending on social services by fifteen of Italy’s twenty regions, from 1988 to 1991, making use of the fragmented data that is available. The study shows firstly the small state expenditure on services in-kind; secondly, it documents the dualism between northern and southern regions which resulted into the very slow development of spending, both quantitative and qualitative, in southern regions. On the whole the data allows a few critical observations on the potential for institutional performance of Italian regions in the social services field.

Consiglio Nazionale dell’Economia e del Lavoro. 1998. *Spesa pubblica per l’assistenza, ruolo degli enti locali e “trappole della povertà”*, [Public expenses for social assistance, the role of local institutions and the ‘poverty trap’]. Rapporto n.3 della Indagine richiesta dalla Camera dei Deputati – Commissione XII Affari Sociali, Roma: CNEL.

This report up by the Centre for Economic Research presents a comparative analysis of the structure and levels of welfare spending in Italy with respect to other European countries. Spending on intervention aimed at maternity, the family and unemployment is examined. The role of municipalities is also analysed to provide a general picture of the structure of social services in Italy. Finally, selection mechanisms for access to social services based on income (means tests) are analysed showing different situations that produce poverty traps.

## 6. Staff and volunteers

Giraldo, Silvana and Riefolo, Edda (eds.). 1996. *“Il servizio sociale: esperienza e costruzione del sapere”*. [Social services: the experience and construction of knowledge]. Milano: Angeli.

This theoretical and empirical report on the role and content of professional social work in Italy first analyses the professional content of social work, training courses and paths to qualification. The second part discusses relations between social work and other professions, and the third part considers university social work training courses. Of particular importance is the chapter by Franca Ferrario on the evolution of the social worker as a professional, and the chapter by

Raffaello Maggian who compares the figure of the social worker envisaged in Italian legislation and regulations versus the legislation of other EU countries.

Boccacin, Lucia. 1993. "Il ruolo del terzo settore nelle politiche sociali". [The role of the third sector in social policies]. Pp. 155-171. In Donati, Pierpaolo (ed.). *Fondamenti di politica sociale. Teoria e modelli*. [The foundations of social policy: theory and models]. Milano: Angeli.

This contribution analyses the role of voluntary organisations in the social services system using data from a survey conducted in Lombardy. The author identifies the main areas of intervention by voluntary organisations. She then identifies and reconstructs the role of intervention within the overall social services system and the type of relationship developed with public institutions. Although the analysis is limited to a single region, it shows the considerable importance of voluntary work to the overall supply of services.

Rei, Dario. 1999. "Tra bisogni dimenticati e domande di vita ordinaria: il volontariato d'aiuto sociale". [Forgotten needs and demands of everyday life: the volunteer of social help]. Pp. 185-202 In Ascoli, Ugo (ed.) *Il welfare futuro. Manuale critico del terzo settore*. Roma: Carocci editore.

Rei identifies the contribution made by voluntary organisations to the development and modernisation of the Italian social services system. Their contribution is seen above all in organisational and cultural support to the de-institutionalisation and de-bureaucratisation of services. The analysis also focuses on the effects of the recent institutionalisation of voluntary organisations through legislative measures and increasingly massive involvement in the provision of specialised services.

## 7. Clients, users, and consumer issues, profiles

Tosi, Antonio. 1989. "Disuguaglianze nell'accesso ai servizi sociali". [Inequality in access to social services]. Pp. 87-128. In Ranci Ortigosa, Emanuele (ed.). *Welfare state e politiche sociali in Italia*. [the welfare state and social politics in Italy]. Milano: Angeli.

This chapter analyses the redistributive effects of welfare policies by considering equal rights of access to social services. The author reconstructs models of service use on the basis of a survey conducted in Lombardy. The differences in service use that emerge reveal inequalities related to the geographical distribution of services and to regulatory criteria of exclusion/inclusion. The analysis finally evaluates the most evident forms of exclusion from social services regardless of the official criteria adopted by public administrations.

Sgritta, Giovanni B. and Innocenzi, Gianfranco. 1993. "La povertà". [Poverty]. Pp. 261-292. In Massimo Paci (ed.). *Le dimensioni della disuguaglianza. Rapporto*

della Fondazione Cespe sulla disuguaglianza sociale in Italia. [Dimensions of inequality: report of the Cespe Foundation on social inequality in Italy]. Bologna: Il Mulino.

This contribution provides an overall picture of the social nature of poverty in Italy. The main methods of identifying poverty are discussed and data is presented on the structure of financial inequality in Italy. The main characteristics of families and individuals living in poverty are then presented using data from ISTAT (Italian National Statistics Office) surveys on significant samples of Italian families. There is specific analysis of the spending and financial condition of the elderly. The main characteristics of poverty in Italy that emerge are: concentration in the South, feminisation, and single income families.

Negri, Nicola. 1993. "L'esclusione sociale". [Social exclusion]. Pp. 293-330. In Massimo Paci (ed.). *Le dimensioni della disuguaglianza. Rapporto della Fondazione Cespe sulla disuguaglianza sociale in Italia*. [Dimensions of inequality: report of the Cespe foundation on social inequality in Italy]. Bologna: Il Mulino.

This contribution estimates the numerical size and main socio-demographic characteristics of different categories of the socially excluded. A large proportion of the data used is on specific categories of service users, specifically substance abusers, the homeless and the disabled. On the whole, a precise picture of the numerical size of social exclusion in Italy emerges, as well as the main problems suffered by these service users.

Gui, Luigi (ed.). 1995. *L'utente che non c'è. Emarginazione grave, persone senza dimora e servizi sociali*. [Serious marginalisation, the homeless and social services]. Milano: Angeli.

This book provides a qualitative analysis of the institutional and organisational mechanisms that structure relationships between social services and the socially excluded, such as the homeless. Parts one and two describe the condition of the homeless in Italy and the ways social services for the homeless function, paying close attention to mechanisms of exclusion and reintegration. Part three by Silvia Tiso draws on individual life histories to analyse the treatment of specific cases. Part four by Mauro Pellegrino presents a picture of the overall system of social services for these groups in Italy and Europe.

## **8. Efficiency, effectiveness and equity of social services provision and financing**

Dente, Bruno and Giorgi, Gianni. 1989. "Efficienza ed efficacia delle politiche sociali: alcuni spunti problematici". [Efficiency and effectiveness of social policies: some initial problems]. Pp. 156-188. In Ranci Ortigosa, Emanuele (ed.). *Welfare state e politiche sociali in Italia*. Milano: Angeli.

The authors propose a model for analysing the effectiveness and efficiency of social services policies using an approach based on public policy analysis. The essentially methodological contribution of this chapter is to suggest the development of a system of assessing social services policies that is attentive to the impact of policies on target populations. The lack of such tools is revealed as a major limitation of public administrations responsible for the development of welfare policies.

## 9. Patterns of relations among providers, including partnership

Ranci, Costanzo. 1999. *Oltre il welfare state. Terzo settore, nuove solidarietà e trasformazioni del welfare*. [Beyond the welfare state: the third sector, new solidarity and transformations of welfare]. Bologna: Il Mulino.

This book provides amply description of the third sector's involvement in welfare policies. It proposes a model of the relationship between the third sector and public authorities in Italy, characterised by mutual accommodation. The effects of this model on the overall structure of the social services system are considered together with a critical analysis of the recent process of privatisation.

Fazzi, Luca. 1998. *Il welfare mix in Italia: primi passi*. [The welfare mix in Italy]. Milano: Angeli.

Fazzi provides critical reflection on the first Italian developments of the welfare mix – an integrated model for formulating and implementing welfare policies through close relationship between public authorities and private or nonprofit providers. The author analyses the introduction of contracting-out in social services and assesses the main outcomes both from an organisational and user viewpoint. There is also analysis of partnership practices and policy proposals which advocate the development of greater cultural integration between public and private or nonprofit actors.

## 10. Innovation and change

Mingione, Enzo. 1999. *La questione dell'esclusione e la riforma del welfare*, [The question of exclusion and the reform of welfare]. Pp. 7-32. In Enzo Mingione (ed.), *Le sfide dell'esclusione: metodi, luoghi, soggetti*. [The challenge of exclusion]. Bologna. Il Mulino.

Mingione provides a good overview of the current debate on welfare policies in Italy. Particular attention is given to the development of social services for fighting social exclusion. The social and geographical features of social exclusion in Italy is considered in relation to the effects of recent changes in the job market and in the family. The features of the social services system, family-oriented and

institutionally fragmented, are then re-examined. Finally some priorities for the development of innovative policies are proposed.

Trifiletti, Rossana. 1998. "Restructuring Social Care in Italy". Pp. 175-206. In Lewis, Jane (ed.). *Gender, Social Care and Welfare State Restructuring in Europe*. Aldershot: Ashgate.

Trifiletti provides a thorough description of welfare policies for the elderly and child care. The author presents the historical context and discusses recent privatisation processes and the redirection of welfare spending to less costly services, with particular attention to the impact on the family as historically the greatest source of care-givers in Italy.

De Leonardis, Ota. 1998. *In un diverso welfare. Sogni e incubi*. [A different welfare: dreams and nightmares]. Milano: Feltrinelli.

This book provides a critical picture of the recent trend toward privatisation of welfare. The first part describes the role of the third sector in the development of a welfare mix. The second part discusses the organisational and cultural changes induced by the development of a "services welfare" based on a flexible supply of care services. The last part analyses the implications of current transformations for the organisational structure of public administrations.

## 11. Bureaucratisation, commercialisation problems

Pasquinelli, Sergio. 1993. "Italy: Toward an Unplanned Partnership". Pp. 48-66. In Kramer, Ralph et al. *Privatization in Four European Countries. Comparative Studies in Government-Third Sector Relationships*. London: Sharpe.

This contribution is part of a wider research project co-ordinated by Ralph Kramer on the privatisation of social services for the disabled in Italy, Great Britain, Holland and Norway. The chapter on Italy analyses the impact of contracting-out on nonprofit social services organisations for the disabled and on inter-organisational relationships, particularly between nonprofit organisations and public authorities.

Barbetta, Paolo. 1996. "Sul contracting-out nei servizi sociali". [Contracting out in social services]. Pp. 105-130. In Borzaga, Carlo, Fiorentini, Gianluca and Matacena, Antonio (eds.). *Nonprofit e sistemi di welfare. Il contributo dell'analisi economica*. [Nonprofits and welfare systems: the contributions of economic analyses]. Roma: NIS.

Barbetta examines the consequences of contracting-out as a tool for regulating relationships between public authorities and private social services providers. The author focuses on the conditions required to guarantee genuine increases in efficiency and quality, and verifies the extent to which these conditions are actually

considered in actual contracting-out practices. He concludes that limits to the use of contracting-out depend on three factors: the absence of competition between private or nonprofit suppliers, the weak definition of the political objectives, and the wide margins of discretion exercised in selecting contractors.

Pavolini, Emmanuele. 1999. "Dal mutuo accomodamento alla collaborazione. Pubblico e privato sociale in Italia". [Mutual agreement in collaboration: public and private welfare in Italy]. *Quaderni di animazione e formazione*, 1999, 30-38. This article looks at changes in types of financial and contractual relationships between public administrations and nonprofit social services providers. It first looks at the 1980's and outlines the typical features of the traditional model of "mutual agreement" between the state and the third sector in Italy. It then focuses on recent privatisation and the introduction of contracting-out. Among the unexpected effects of privatisation is the proliferation of different organisational models adopted by nonprofit organisations, and the development of forms of coordination between them.

## 12. Comparative, cross-national issues

Consiglio Nazionale dell'Economia e del Lavoro. 1998. *L'articolazione istituzionale e organizzativa dell'assistenza in alcuni paesi Ocse*. [Institutional and organisational assistance in OECD countries]. Rapporto n.4 della Indagine richiesta dalla Camera dei Deputati – Commissione XII Affari Sociali, Roma. This report analyses the institutional structure of welfare policies in Italy, Great Britain, Germany, France and Holland. The part on Italy analyses the distribution of responsibilities between central government, regions, provinces and local authorities and describes in detail the main types of services covered in legislation. A final comment by Carla Collicelli examines similarities and differences between the five countries examined.

## 13. Current trends and policy issues

Saraceno, Chiara. 1998. *Mutamenti della famiglia e politiche sociali in Italia*. [Changes in the family and social policies in Italy]. Bologna: Il Mulino. This book reviews changes in the formation of the family in Italy and discusses the division of labour in the family and family finances (income, consumption, transfers, taxes). It then concentrates on the network of relationships between the family and social services. What emerges is a picture of the family performing the functions typical of welfare systems, without adequate support or tutelage by the state. The book therefore constitutes a valuable description of the "family" orientation of social services systems in Italy.

Ferrera, Maurizio. 1998. *Le trappole del welfare*. [The welfare trap]. Bologna: Il Mulino.

This text provides a thorough analysis of the most important current changes in the Italian welfare system, and compares these with current developments in other European countries. Particular attention is given to organisational and institutional mechanisms that inhibit policy change, which is increasingly necessary due to the emergence of types of risk not adequately covered by the current welfare model. Though its scope goes beyond social services, the text discusses many issues relevant to current developments in this specific field.

Ascoli, Ugo (ed.). 1999. *Il welfare futuro. Manuale critico del terzo settore*. [The future of welfare: critical handbook of the third sector]. Roma: Carocci.

This book provides a general framework for understanding how relationships between public administrations and the third sector are evolving in the field of welfare policies. The introduction by Ugo Ascoli provides a brief description of the main trends: privatisation of service provision, the development of contracting-out and new forms of partnership between public and private actors, and the emergence of specialist nonprofit organisations in social service provision with stronger business capabilities. Useful articles include that by Sergio Pasquinelli on the role of the third sector in welfare policies in different European countries, and that by Franco Pina on the role of nonprofit organisations in the treatment of marginalisation and deviance.

## C. Special fields

### Child and youth welfare

Neresini, Federico and Ranci, Costanzo. 1991. *Disagio giovanile e politiche sociali*. [Teenage hardship and social policies]. Roma: Nuova Italia Scientifica.

This text analyses welfare policies developed to counter hardship and marginalisation among youths. It provides a general picture of the social processes underlying hardship among youths, which may result in social exclusion or deviance. It illustrates the main public and private welfare programmes for young people, focusing particularly on the “youth projects” set up by some local authorities. It then tackles a few specific subjects such as methodologies for the design and assessment of intervention to fight hardship among youths.

Kazepov, Yuri. 1996. “Alcune politiche per l’integrazione sociale dei minori”. [The politics of the social integration of minors]. Pp 99-123. In Kazepov, Yuri. *Le politiche locali contro l’esclusione sociale*. [Local policies to combat social exclusion]. Roma: Istituto Poligrafico dello Stato.

This report for the Commission for the Investigation of Poverty and

Marginalisation provides detailed analysis of interventions for the social integration of minors in fourteen large urban centres (including almost all major Italian cities). The legislation at national and regional levels is presented and several types of intervention are analysed: foster care and other forms of temporary residential care for minors at risk; educational initiatives, specific projects aimed at adolescents, etc. The report shows the great fragmentation and lack of uniformity in the measures implemented.

Saraceno, Chiara. 1998. "Le politiche e i servizi per l'infanzia". [The politics and services for children]. Pp. 119-136. In Saraceno, Chiara. *Mutamenti della famiglia e politiche sociali in Italia*. [Changes in the family and social policies in Italy]. Bologna: Il Mulino.

One chapter in this book describes policies for the tutelage and care of children. It discusses the recent debate on child care services, revealing that little importance is placed on reconciling household work and paid work. A thorough description of existing pre-school child care services follows, focusing on the history of infant and pre-school nurseries. Compulsory schooling and education services are then discussed.

Trifiletti, Rossana. 1996. "La politica dell'infanzia in Italia: lo spazio del discorso politico e la ricostruzione storica". [The politics of childhood in Italy: the displacement of political discourse and historical reconstruction]. Pp. 31-49. In Trifiletti, Rossana and Turi, Paolo (eds.), *Tutela del bambino e famiglia "invisibile". L'analisi di una politica sociale in Toscana*. [Guardianship of the 'invisible' child and family: analysis of a social policy in Tuscany]. Milano: Angeli.

Trifiletti analyses the development of welfare policies for children. She first examines the general historical background against which policies for children were developed. Secondly she reconstructs the policy network characterising phases in which child policies became part of the political agenda.

## Family services

Saraceno, Chiara. 1997. "Le politiche per la famiglia". [Policies for families]. Pp. 301-310. In Barbagli, Marzio and Saraceno, Chiara (eds.), *Lo stato delle famiglie in Italia*. [The state of the family in Italy]. Bologna: Il Mulino.

Saraceno summarises the main characteristics of public policies for family support: more attention is generally given to marriage than to children; the financial cost of children is under recognised and difficult to sustain; the family (including extended) is used to ration state resources and avoid further investment in services; there is progressive shrinking of public policies in favour of the family and policies for the poor. Together these factors explain, according to the

author, the paradox that countries most heavily imbued with a “family” ideology nevertheless develop so little policy on behalf of the family.

Bosco, Nicoletta. 1997. “L’assistenza alle famiglie in difficoltà”. [Assistance to families in difficulty]. Pp. 311-320. In Barbagli, Marzio and Saraceno, Chiara (eds.). *Lo stato delle famiglie in Italia*. [The state of the family in Italy]. Bologna: Il Mulino. Bosco illustrates the major welfare interventions developed by local administrations to support families in difficulty. Regional legislation supporting families is presented, followed by an analysis of the welfare interventions in a few large municipalities, with particular impact on the family: home care services and income support measures.

Ferrucci, Fabio. 1998 “Gli orientamenti delle politiche familiari in Italia alla fine degli anni ’90”. [The orientation of family policies in Italy at the end of 1990]. *Sociologia e politica sociale*, 1, 3, 47-78.

Ferrucci presents the most recent changes in family welfare policies: new criteria for access to income support measures, new services for very young children, alternatives to standard nurseries, new measures to reconcile work and care and to facilitate access to health services and housing. In examining these measures the author points out continuities and discontinuities with respect to past family policies.

## Frail elderly, nursing homes, long-term care

Facchini, Carla and Scortegagna, Renzo. 1994. “Italia: alternative alla istituzionalizzazione e ruolo centrale delle donne”. [Italy: alternative to the institutionalisation and central role of women]. Pp. 33-69. In Lesemann, Frederic and Martin, Claude (eds.). *Assistenza a domicilio. Famiglia e anziani*. [Home care: family and the elderly]. Milano: Angeli.

This contribution analyses policies on home care for the elderly in Italy. The first part presents the available data on different types of social services for the elderly (residential care institutions, home care services, day centres, etc.). The second part looks at innovations to prevent the institutionalisation of non self-sufficient elderly. The contribution is one of the few to provide a general picture of social services policies for the elderly which underline women’s fundamental role in the provision of care in Italy.

## Disabled

Ferrario, Paolo. 1995. “Handicap”. [The disabled]. Pp. 144-169. In Ferrario, Paolo. *Politica dei servizi sociali*. [Policy and social services]. Roma: NIS.

This chapter presents a complete review of services for the disabled in Italy up to the end of the 1990s. It was written when the development of the social services system for the disabled was virtually complete, and thus remains valid today. It describes the size of the phenomenon and the current definitions used in welfare policies, followed by a review of the main forms of intervention: measures to assist the disabled; programmes for integrating disabled children into schools; laws establishing the right of the disabled to work and work integration programmes; health and social services rehabilitation programmes.

## Homeless, the poor, poverty

Morlicchio, Enrica. 1996. "Exclusion from Work and the Impoverishment Processes in Naples". Pp. 325-342. In Mingione, Enzo (ed.), *Urban Poverty and the Underclass. A reader*. Oxford: Blackwell.

Morlicchio analyses the mechanisms of impoverishment in Naples. The hypothesis is that social exclusion depends less on the social and cultural characteristics of the urban environment in which those subject to impoverishment live, and more on the processes of de-industrialisation that have affected Naples over the last decade. The analysis therefore focuses firstly on the progressive deterioration of the labour market and the spread of unemployment, and secondly on the functioning of informal family networks in limiting the damaging effects of unemployment. In conclusion several welfare and labour policy proposals are presented.

Tosi, Antonio, 1994. *Abitanti. Le nuove strategie dell'azione abitativa*. [Inhabitants: the new housing strategy]. Bologna: Il Mulino.

This book tackles the subject of housing exclusion, focusing on the political construction of the problem and on the main forms of treating it. Homelessness is defined as a problem of social exclusion rather than mere lack of housing. Consequently, various interventions are analysed which seek to combine housing reintegration measures with social work supervision and care aimed at reintegrating the homeless into society and the labour market.

Micheli, Giuseppe; Laffi, Stefano. 1995. *Derive. Stati e percorsi di povertà non estreme*. [Conditions and precursors of non-extreme poverty]. Milano: Angeli.

This text presents the results of a study of the case histories of families suffering hardship. The focus is on four factors: financial poverty, the presence of a family member with a handicap, the presence of an elderly relative to care for, the presence of a large number of children. Analysis of the case histories of these families highlights not just biographical social processes, but also the role of social services in preventing or failing to prevent impoverishment. A few general observations by the authors place the empirical results of the study within the theoretical debate on poverty.

Tosi, Antonio. 1997 e 1998. *Italy Reports to the European Observatory on Homelessness*, Milano: Politecnico di Milano.

These two reports to the Feantsa European Observatory on Homelessness tackle the subject of housing reintegration for the homeless. The reports analyse the overall situation of existing opportunities and then focus on specific innovations in which housing reintegration has been combined with social care and supervision. A few general observations are made to grasp the impact of these innovative measures on the overall structure of social services and their capacity to respond to serious housing hardship.

Kazepov, Yuri. 1998. *Citizenship and poverty. The Role of Institutions in the Structuring of Social Exclusion*, EUI Working Papers, No. 98/1, European University Institute, Florence.

Kazepov analyses institutional structuring processes of poverty and social exclusion, comparing Germany and Italy. The author describes the main social changes transforming the risk profiles of the population and contributing to the emergence of new forms of social exclusion. Social risk structures are then compared with the set of social rights recognised under legislation, and with the ways institutions deal with poverty. In conclusion a typically Italian model of social welfare policies is proposed.

## Unemployed

Reyneri, Emilio. 1996. *Sociologia del mercato del lavoro*. [The sociology of the labour market]. Bologna: Il Mulino.

Chapter six of this book reconstructs the Italian unemployment model, showing geographical differences, its strong young and female character, and the consequences of unemployment for poverty levels and social exclusion. Chapter twelve describes the entire range of labour policies including intervention with strong welfare connotations, such as support for the long-term unemployed, the supply of socially useful jobs financed by the state, the encouragement of female employment and employment for the disabled. The chapter discusses institutional and organisational constraints that hinder the development of active policies and a pluralist approach to the problem.

## D. Summary assessment of current debates in the field

Debates on the state of social services in Italy have grown enormously in recent years along with the development of political reflection on changes in the progress of the welfare system as a whole. For a long time social services policies were formulated in Italy as “implicit policies”, with no thorough examination

either in research or within politics. Recent transformations of the welfare system and the emergence of limits to welfare coverage and pension schemes has raised discussion of in-kind social services to the centre of debate. In this context, the most promising lines of development seem to be:

- **Reflection on the relationship between social services and care provided by the family and informal networks, in which the historically fundamental role of the family is evident. The accentuated “family” nature of the Italian system now appears to be in crisis due to the profound changes in the family structure.**
- **Reflection on the effectiveness of policies to fight poverty and social exclusion. The idea that welfare policies should change direction and aim at social and work reintegration for the disadvantaged is making headway.**
- **Reflection on the mixed nature of social services models with a wide range of private or nonprofit providers alongside state financial support – although the work of these providers is poorly co-ordinated and little regulated.**

On the whole, it seems that the near future will bring a growing and informed academic debate in the social services field, aided by the recent establishment of university level training courses in social work.

# Luxembourg

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## A. Synopsis of the Social Service System

The definition of social services in Luxembourg includes services offered in what is called the 'semi-public' sector (nonprofit or private social, family and therapeutic services linked by "convention" or contract to relevant ministries), Guaranteed Minimum Wage whose beneficiaries are monitored by social services (co-ordinated by the National Service for Social Action), and dependency benefit.

Since Luxembourg's independence in 1839, social action has been shaped by the principle of 'subsidiarity'. With the exception of legislation between 1901 and 1911 under the 'Bismarkian model' and concerning insurance for pensions, accidents and sickness, the state has always favoured local or private social service provision. According to legislation of 1840 and 1897, district councils were responsible for 'public charity' while private organisations were largely responsible for health services such as home care and family help. The Catholic Church played an important role in these developments and continues to do so today. A large proportion of social services were provided by religious organisations (from 1920 onwards by the Caritas), even within the framework of state institutions. The steel industry dominating the economic structure of the country until the 1970s also complemented social services provision (family allowances, housing, health assistance, holiday homes, etc.). Secular organisations such as the League Against Tuberculosis (1908) and the Red Cross (1923) also contributed to a comprehensive network of medical and social assistance.

The importance of the Church in the evolution of social action followed by secular aid organisations is a familiar pattern in most Western European countries. But unlike neighbouring countries, Luxembourg never developed a significant public system of social services. However, increasing state involvement and flourishing private initiatives can be observed from the 1970s onward in response to social protests, the expression of new social needs, and demographic problems affecting religious congregations. New state initiatives included: the National Solidarity Fund (as early as 1960) for the elderly, the unemployed, and to a lesser extent single parent families; a compensatory cost-of-living allowance (1975), allowances for the severely disabled (1979) and heating allowance (1983). A Guaranteed Minimum Wage was introduced on 26 July 1986 to establish preventive measures «against pauperisation» and to co-ordinate efforts by "incorporating the cost-of-living allowance, as well as any other limited contribution intended to remedy clear cases of poverty, in a comprehensive framework of pro-

visions". Benefits are not dependent on specific causes of deprivation, but other types of means-testing (access to other resources, ability to work, etc.) may be applied and beneficiaries are monitored by social services (council benefits offices and private social-action services co-ordinated by the National service for social action). The state provides nearly all funding.

*Evolution of employment in the semi-public sector 1990-1998*

	1990	1995	1998
<b>Ministry of the Family</b>	<b>931.4</b>	<b>1,360.9</b>	<b>1,643.1</b>
Offices for the promotion of the family	31.1	57.3	68.8
Boarding schools	9.0	55.0	66.0
Consumer protection units	9.5	11.5	11.5
Youth centres	311.2	331.7	357.0
Social centres for (adults) and the disabled*	271.1	326.0	470.9
Social centres and services for adults	n.a.	52.4	60.0
Day-care centres for children	177.8	316.7	341.7
Familial placing services	13.3	20.6	23.6
Aid and assistance services	35.8	34.7	40.7
Immigrant services	-	3.0	5.5
Services for the elderly	72.6	152.1	183.5
Relocation of neuro-psychiatric units	-	-	14.0
<b>Ministry for the Promotion of Women**</b>	<b>41.3</b>	<b>61.6</b>	<b>62.2</b>
Social services for women	32.0	47.8	47.4
Services for women	9.3	13.8	14.8
<b>Ministry of Health</b>	<b>232.0</b>	<b>479.5</b>	<b>649.3</b>
League for social-medical action and prevention and Red Cross	72.0	92.0	94.0
Nursing homes	90.7	247.5	373.5
Home care and day centres for the elderly	31.0	41.0	43.3
Mental-health services	16.5	43.0	58.0
Other services	21.8	56.0	80.5
<b>Ministry of Employment</b>	<b>1.0</b>	<b>12.0</b>	<b>13.0</b>
<b>Ministry of Social Security</b>	<b>20.0</b>	<b>25.5</b>	<b>21.0</b>
<b>Ministry of Education</b>	<b>66.0</b>	<b>77.0</b>	<b>***15.8</b>
<b>Ministry of Youth</b>	<b>0.0</b>	<b>7.0</b>	<b>21.5</b>
<b>Other ministries</b>	<b>40.0</b>	<b>53.0</b>	<b>68.7</b>
<b>Total</b>	<b>1,331.7</b>	<b>2,076.5</b>	<b>2,490.5</b>

\*Social centres for adults became an individual category in 1995.  
\*\*Staff under the responsibility of the Ministry of the Family until 1994.  
\*\*\*Staff moved from the category of differentiated education to the Ministry of the Family.

Private initiatives in the form of charities flourished in domains such as aid for the disabled, care centres, family assistance, day nurseries and children's centres. The state maintained the principle of subsidiarity, maintaining involvement in social action without nationalising services. The first 'conventions' or contracts between ministries and social service charities were signed in 1975 to ensure state funding (partial or full), give the state control over finances and representation on charity management committees, and allow the private sector freedom of initiative, especially with regard to working methods. The legislative and regulatory foundation of this arrangement was relatively weak and different ministries offered different types of conventions. More than two decades later legislation was passed, providing a legal framework for state relations with service providers and for all work carried out in social, therapeutic and family services. The 1998 law reaffirms the primary importance of private action but sets minimum standards, a form of protection for beneficiaries, and a framework for ministries to certify non-government services.

A dependency benefit was instated on 1 January 1999 to address the demands of an ageing population. Dependent persons are entitled to both benefits in-kind or financial compensation for the purchase of such assistance. The state budget and contributions from incomes (amounting to 1% at present) each provide half of all funds for the dependency benefit. In some respects the 1999 legislation comprised a simple budget reallocation; previously the state was to subsidise services for dependent persons, such as nursing homes and health-care allowances. However, it is likely that the creation of a dependency benefit will encourage new claims to emerge.

There is a dearth of aggregated data on the overall economic importance of social services. However, in 1998 the semi-public sector accounted for approximately 6.5% of central government, local government and public-sector employment (including post and telecommunications, railways and the national-savings bank), or 2,400 of 37,300 positions. The structure and size of the semi-public sector in terms of employment is summarised in the table below. The most notable feature is the expansion of the sector as a whole, with particularly striking developments in care centres for the disabled, children's day centres, services for the elderly and nursing homes. Since 1999 some services for dependent persons and the elderly have also been funded from the dependency-benefit budget.

It is more difficult to determine the financial significance of the state-related sector, however some figures are available. In 1998 the Guaranteed Minimum Wage accounted for only 1.5% of the social-security budget (£230m. of a total of £15,000m.). In 1996 the Ministry of the Family contributed approximately 65% of the semi-public sector's requirements, representing about 1.5% of the state's total budgetary expenditure.

## B. Annotated Bibliography

### 1. Comprehensive works, overview volumes, classics on social services and the welfare system

CEPS/INSTEAD, éd. (1997). *Recueil d'études sociales*. [Collection of social studies]. Document PSELL (Panel socio-économique „Liewen zu Letzebuerg“), n° 100, Luxembourg (mars 1997).

Since 1985, research by the Population and Households Division of the Centre d'Etudes de Populations, de Pauvreté et de Politiques Socio-Economiques/International Networks for Studies in Technology, Environment, Alternatives, Development (CEPS/INSTEAD) has primarily analysed results of the PSELL programme, a survey of living conditions in Luxembourg in a sample group of households. Most findings have been published in the PSELL Documents series, but are limited to a sectoral analysis of living conditions. A more comprehensive and synthetic approach is found in PSELL Document No. 100. The issue contains 34 articles on seven fields: Population, Human Resources, Professional Activity, Incomes, Lifestyles and Household Budgets, Living Environment, Social Policies. While the institutional and organisational aspects of social services are only marginally addressed in work by the CEPS, the PSELL documents provide vital indications of the basic social conditions that influence the orientation of social policies.

Hartmann-Hirsch, Claudia. (1992). *Les services sociaux au Grand-Duché de Luxembourg, Rapport présenté dans le cadre de l'Observatoire de politiques nationales de lutte contre l'exclusion sociale de la Commission Européenne*. [Social services in the Grand-Duchy of Luxembourg: report presented by the Observatory of national politics to fight social exclusion of the European Commission]. Luxembourg, éd. Service national d'action sociale (novembre 1992).

Hartmann-Hirsch, Claudia (1992a). *Rapport de synthèse, Rapport présenté dans le cadre de l'Observatoire de politiques nationales de lutte contre l'exclusion sociale de la Commission européenne*. [Synthesis: report presented by the Observatory of national politics to fight social exclusion of the European Commission]. Luxembourg, éd. Service national d'action sociale (décembre 1992).

Hartmann-Hirsch, Claudia (1993). *Services publics, services privés et autorités: Dépendance, indépendance, déconcentration et coordination. Rapport à la Commission européenne*. [Public services, private services and authorities: dependence, independence, fragmentation and co-ordination; report to the European Commission]. Luxembourg (mai 1993).

Hartmann-Hirsch, Claudia (1994). *L'exclusion sociale et l'espace au Grand-Duché de Luxembourg. Rapport pour la Commission européenne*. [Social exclusion in the

Grand-Duchy of Luxembourg: report to the European Commission]. Présenté par Claudia Hartmann-Hirsch en collab. avec Claude Gengler, Luxembourg. In Luxembourg, minimal research is carried out on the organisational, operational and socio-economic aspects of social services. The CEPS – the only existing centre for social research in Luxembourg (see above) – is concerned primarily with analysis of incomes, and therefore also with financial social benefits. Institutional factors are broached from a sectoral perspective. Consequently, ‘grey literature’ (reports, brochures, etc.) provides a necessary information alternative. Hartmann-Hirsch’s reports are of particular interest, offering an analytical approach to the social sector as a whole. The first report (November 1992) provides an historical survey of the evolution of social services, a description of their legal framework, and a study of their efficiency. The second report (December 1992) analyses the various fields of social action (income, employment, housing, education, health) and relevant policies. The third report (May 1993) analyses the organisation of the sector (problems of co-ordination, competence, interference of local and national levels, etc.) and the interface between public services and the semi-public sector. Although the reports were written before legislation on dependency benefits (1 January 1999) and on normalising relationships between the state, private and state-related providers of social, family and therapeutic services (8 September 1998), many of the subjects Hartmann addresses remain relevant. Substantial data on the effects of the dependency benefits will not be available until the 1999 report by the General Inspectorate of Social Security is released at the end of 2000.

Inspection générale de la Sécurité sociale, IGSS, éd. (1999). *Rapport général sur la sécurité sociale en 1998*. [General report on social security, 1998]. Luxembourg. The annual reports of the General Inspectorate of Social Security contain the basic statistical data on the evolution of social security since the mid-1970s. The reports deal primarily with the traditional ‘pillars’ of social security (sickness benefits, pensions, injury benefits, family allowances) but also contain information about the Guaranteed Minimum Wage. This data enables the development of social services to be placed within the general framework of social protection in Luxembourg.

Braun, Michael, (1982). *Die luxemburgische Sozialgesetzgebung bis zum Zweiten Weltkrieg. Entwicklung, Probleme und Bedeutung*. [Social assistance legislation until WW II]. Stuttgart, Klett, (Beiträge zur Wirtschaftsgeschichte; Bd. 15). Michael Braun’s doctoral thesis, barely known in Luxembourg, addresses the development of social security in the country up to WWII. The book not only highlights the financial and legal evolution of health insurance, injury benefits and pensions, but also studies their political and social contexts. The work is based on parliamentary documents (minutes of the Chamber of Deputies, legislative bills) and the administrative reports and documents of the various social-security funds. Interestingly, the pension fund also provided direct social services

in the fight against tuberculosis. Braun's work provides an essential long-term perspective on the evolution of social protection in Luxembourg.

Eurostat, éd. (2000). "L'exclusion sociale dans les Etats membres de l'UE" [Social exclusion in the member states of the EU], by Lene Mejer. Statistiques en bref. Thème 3: population et conditions sociales, n° 1/2000: pp. 1-11.

Eurostat, éd. (1999). *European Community Household Panel (ECHP), Selected indicators from the 1995 wave, Thème 3: population and social conditions*. Luxembourg. Office des publications officielles des Communautés européennes.

Eurostat, éd. (2000). *Living conditions in Europe. Statistical Pocketbook, Edition 2000*. Thème 3: Population et conditions sociales, Luxembourg, Office des publications officielles des Communautés européennes.

The development of society and social policy in any given country can hardly be understood without a comparative approach. The three Eurostat publications above help provide a clearer view of the differences between the standards of living and living conditions in various European countries.

## 2. Supply and demand

Ministère de la Famille, éd. (2000) – *Rapport d'activité 1999*. [Activity report 1999]. Luxembourg.

Ministère de la Santé. éd. (2000) – *Rapport d'activité 1999*. [Activity report 1999]. Luxembourg.

In the absence of general analyses of social and socio-medical services in Luxembourg, the annual reports of the Ministry of the Family and of the Ministry of Health constitute important source materials. These annual reports provide important information on social action and services (excluding social security), which considered over a period of years may indicate general trends in state policies on social services. They provide information on the internal activities of the ministries' services and of non-profit and semi-public services contracted by government. In contracted services the state generally pays for staff and operating costs, while service providers must respect quality standards and submit their financial accounts to state accountants.

The semi-public services linked to the Ministry of the Family mainly undertake activities for children and families (family-planning and counselling services, social centres, day centres, socio-educational centres, socio-familial boarding facilities, adoption services, etc.), but also those for adults (adult social centres, etc.), the elderly (retirement homes, home care services, etc.) and immigrants. The Ministry of Health finances semi-public activities and services for the physically or mentally

disabled (home care services, psycho-social monitoring, alternative housing arrangements for former psychiatric patients, etc.), as well as AIDS-related activities and the early re-education of children with a medical condition. The Ministry of Health also funds the Red Cross and the League for Socio-Medical Action and Prevention. Preventive and social medicine, along with health in the workplace and in schools, also fall within the competence of the Ministry of Health. Notably, a proportion of both Family and Health ministries' budget was transferred to the dependency-benefit fund on 1 January 1999 (nursing homes, home care services).

Ministère du logement, éd. (2000). *Rapport d'activité 1999*. [Activity report 1999]. Luxembourg.

The annual report of the Ministry of Housing contains interesting long-term analysis of the housing market (construction projects, prices, etc.), detailed information on state contributions to individual housing projects (capital-related aid: construction/purchasing bonuses, funding contributions for special equipment for the disabled, refunding VAT on housing projects, etc.; and interest-related aid: interest subvention and improvement) and on individual contributions allocated by councils. The report also describes the activities of the Fund for Low-Cost Housing, which supervises all acquisition and development of land for low-cost housing (for rental or sale) as well as construction. The Fund concentrates on projects 'demonstrably required to address the urgent local and regional need for housing facilities, as well as the need for urban reorganisation within the framework of town and country planning'.

Ministère de la promotion féminine, éd. (2000) *Rapport d'activité 1999*. [Activity report 1999]. Luxembourg.

Since the creation of the Ministry for the Promotion of Women in 1994, a number of conventions or contracts have been established between the ministry and social service organisations. In particular, the ministry has taken responsibility for financing women's social centres as well as women's education, counselling and information offices.

Ministère du Travail, éd. (2000). *Rapport d'activité 1999*. [Activity report 1999]. Luxembourg.

In order to integrate local variations in its fight against unemployment, the Ministry of Employment helps fund grass-roots 'back-to-work' and training projects for the unemployed. Following an initiative by Luxembourg's two largest trade unions, local councils, private organisations and businesses co-operate on these projects.

Resolux, éd. (1998). *Resolux: réseau social Luxembourg*. [Resolux: social network Luxembourg]. Info-Handicap, Luxembourg.

This practical guide lists all social services in Luxembourg. Resolux provides a

brief description of each service function and affiliated ministries, but does not analyse the social services system itself. The last edition was published in 1998. It is now possible to access the Resolux database at <http://www.resolux.lu/db/resolux2.htm>

Socialnet. Base de données de sites luxembourgeois oeuvrant le domaine psycho-medico-social: <http://www.socialnet.lu/>. [Provision in the domain of psycho-medical-social services].

The Socialnet project was launched by ADAPTH (Association for the Development and Dissemination of Technical Aids for the Disabled), a semi-public association affiliated to the Ministry of Health. The association provides the ministry with reports and consultation services and counsels private individuals (especially on how to adapt facilities to the needs of the disabled). Socialnet intends to create and update an on-line network to assist professionals and individuals working in the psycho-medical-social sector.

### **3. Definition, forms and types of social services**

*See entries under previous sub-heading.*

### **4. Organisational aspects, forms, ownership and auspices of provider**

Chambre des députés, (1991-1998). *Projet de loi 3571* réglant les relations entre l'Etat et les organismes œuvrant dans les domaines social, familial et thérapeutique. [Law 3571 on the relations between the state and social, familial and therapeutic service organisations]. Luxembourg.

The parliamentary bill that standardised the state's relationship with the semi-public sector was proposed as early as 1991 but became law only in 1998, demonstrating the difficulty of legislating such an expansive, unco-ordinated domain. Organisations working in the field never managed to integrate, despite their repeated intent to do so. Still, some sectoral accords have been established (Accord on day centres, Accord on social centres, etc.) and the duplication of services reduced. The *Projet de loi 3571* covers the original bill and the 1998 legislation and contains all related parliamentary documents (some twenty texts), including the advice of industry associations and the Council of State. This offers a relatively detailed view of the relevant issues in the organisation of social services and the relationship between the state and this sector. These documents can be accessed from the Internet site of the Chamber of Deputies of Luxembourg. The archives (containing all parliamentary documents since 1945) can be accessed from Internet page <http://195.10.65.19/framesets/archives.html>, and the documents located by entering the number of the bill under the heading 'parliamentary file' within the 'advanced search' entry box.

## 5. Staff and volunteers

Pauly, Michel et al. (1998). „Sozialarbeit zwischen gesellschaftlichem Engagement und Professionalisierung“ [Social work and professionalisation]. Par Michel Pauly, Susanne Wahl, Manuel Achten, Paul Schmit, Gilbert Graf, Jan Nottrot, Françoise Kuffer, Laura Zuccoli, Raoul Schaaf, Manfred Schenk, Jean-Marie Wagner. *Forum fir kritesch Informatioun iwer Politik, Kultur a Relioun*, Luxembourg, n° 183, Avril 1998: 19-45.

Almost all authors who collaborated on this work, appearing in the periodical Forum, work in the semi-public sector. They provide their own view of social services in a context of prevailing liberalism, coupled with the demands of professionalism and efficiency.

Lejealle, Blandine (1998). „Le travail bénévole au Luxembourg“. [Voluntary work in Luxembourg]. *Population et emploi, Bulletin d'informations démographiques et sociales (série bleue)*, Luxembourg, n°1/1998, STATEC, CEPS/INSTEAD, IGSS, janvier 1998: 1-5.

This work constitutes, as far as known, the first statistical study of voluntary work in Luxembourg. Using the 1997 socio-economic household sample the author examines the population's participation rate in various types of voluntary work (charities, 'people-to-people' work, etc.), the amount of time devoted to different types of voluntary work, and the predictability of individuals' involvement in voluntary work in relation to factors such as nationality, their socio-economic background, etc.

## 6. Efficiency, effectiveness and equity of social services provision and financing

Hausman, Pierre (1994). *Etude comparative sur l'efficacité de la protection sociale*. [Comparative study of the effectiveness of social protection]. Document PSELL (Panel socio-économique des ménages "Liewen zu Letzeburg"), n° 66, Luxembourg, CEPS/INSTEAD.

Jeandidier, Bruno et Poussing, N. (1994). *Mesure de l'efficacité des transferts sociaux selon une approche en termes de sécurisation du niveau de vie des ménages: une analyse statique puis dynamique, appliquée au cas du Luxembourg et de la Lorraine*. [Measuring the effectiveness of social transfers through an approach based on securing the standard of life: a more dynamic statistical analysis applied to the case of Luxembourg and the Lorraine]. Document PSELL (Panel socio-économique des ménages "Liewen zu Letzeburg"), n° 61, Luxembourg, CEPS/INSTEAD.

Eurostat, éd. (2000). „Les transferts sociaux et leurs effets redistributifs dans l'UE. Dernières données disponibles“, [Social transfers and their redistributive effects in the EU: latest figures]. Par Eric Marlier et Marc Cohen-Solal, *Statistiques en bref (Thème 3: Population et conditions sociales)*, n° 9/2000: pp. 1-7.

## C. Special fields

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Groff, Alfred (1990). Schaffen wir die Kinderheime ab?! [Abolish children homes?]. *Bulletin de l'Association Nationale des Communautés éducatives (ANCE)*, Esch-sur-Alzette, n° 69, pp. 19-22.

Soisson, Robert et al. (1995). *Jugendhäuser*. [Youth homes]. Dossier par Robert Soisson, Nico Meisch, Marthy Welschbillig, Monique Collé. *Forum fir kritesch Informatioun iwer Politik, Kultur a Relioun*. Luxembourg, n° 164 (Dez. 1995), pp. 7-38.

Soisson, Robert et al. (1999). *Vom Kinderschutz zur Familienhilfe*. [Child protection and family services]. Dossier par Raymond Klein, Roland Seligmann, Mariejeanne Schon, Manuel Achten, E.T./F.N., Robert Soisson. *Forum fir kritesch Informatioun iwer Politik, Kultur a Relioun*, Luxembourg, n° 191 (April 1999), pp. 26-64.

Ministère de la Famille, éd. (1996). *Les droits de l'enfant au Grand-Duché de Luxembourg*. [Children's rights in the Grand-Duchy of Luxembourg]. Rédigé par Jos. Bever, Francis Delaporte, Jacques Kuntziger, Mill Majerus, Robert Soisson, Serge Thill), Luxembourg, Impr. Centrale.

Ministère de la Famille, éd. (1994). *Staatlech Kannerheemer: 1884-1994*. [Public children homes: 1884–1994]. 110 Joer Kanner op der Rhum, Luxembourg.

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## D. Summary assessment of current debates

In Luxembourg recent social policies have been characterised by a two-pronged approach which may be considered either ‘efficiently’ pragmatic, as proponents of this system would argue, or contradictory.

On one hand government has pursued an active and innovative legislative agenda (introducing the Guaranteed Minimum Wage in 1986 and the dependency

benefit in 1999) to address two major social challenges: social deprivation (with the emerging threat of a two-tier society) and the ageing population. On the other hand government has exhibited a certain reserve regarding the participation of public bodies and ministries in direct field action. The anarchic proliferation of private organisations and associations, financially supported by the state through the system of ‘conventions’, suggests an ad hoc approach rather than the application of consistent policy. Over twenty years elapsed before a legal framework for state-service provider relationships was instated and some degree of user protection was introduced. While this legislation also more clearly defined the relationships between service providers and their users, it neglected the relationship between clients and the state. Unresolved questions include: Can citizens claim a right to social services? Should semi-public bodies be autonomous? To what extent can such bodies be granted freedom of action and initiative when the state provides (and may withdraw) their funding? The fact that the state negotiates with many parties rather than a single representative of social services gives it the upper hand to define social policies with some flexibility.

Presently, associations seem to accept these ambiguous relationships as well as the principle of ‘subsidiarity’ on which social action in Luxembourg is based. Both the state and politicians seem to have accepted the idea that these providers are better placed to recognise social needs, and thus have been willing to fund their activities. In return, these organisations must have their accounts and service quality checked and must offer open and non-discriminatory access to their services. With this devolution the state abdicates to non-profit organisations the responsibility for the analysis and anticipation of social change. However, public bodies and the political sphere as a whole still risk being held accountable for failing to respond to needs not recognised by non-profit organisations. For example, is the state responsible for the belated development of family services such as day centres? Indeed, the extraordinary expansion of the semi-public sector over the last ten years can be explained just as well by this belated development as by a booming demand.

For some time now, non-profit organisations have been competing with commercial enterprises in certain areas (nursing homes, day centres, etc.). This competition, bound to expand to other fields, requires that the non-profit sector ensures competitive quality, price and cost of its services. As a result, it is likely that more powerful organisations will supply an increasing proportion of services, but the effect on quality of services is unclear.

The organisation and operation of social services cannot be understood without reference to Luxembourg’s financial policy. The country’s situation is unique in so far as the state budget has been balanced for decades and has produced regular surpluses that have been redirected to public-investment funds. ‘Subsidiarity’

and 'budgetary austerity' cannot be dissociated. The state seems to have consistently supported the idea that private social action is cheaper than direct public action. Public consumption figures (including operational and staff costs of central and communal public administrations, the cost of the semi-public sector, etc.) indicate the success of this policy. During the 1990s, public consumption of social services was on average equivalent to 13% of the GDP (market prices, ESA version) compared to 14% in Belgium, 19% in France and Germany, and more than 25% in Denmark and Sweden. However, we must ask if Luxembourg's success is based on the fact that some social needs have been overlooked. Finally, it should not be forgotten that generally social services are less developed in countries experiencing rapid economic growth, as the case in Luxembourg since 1985.

# The Netherlands

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## A. Synopsis of social service system

The Dutch system of social services does not have a clear-cut transparent structure. Most often the field of social service is referred to as the “care and welfare” (*zorg en welzijn*) system, distinguishing it from health care and social security systems. The system of care and welfare comprises all services, policies, laws and regulations directed at the encouragement, care, support and counselling of people. It aims to achieve the well-being and functioning of people in their families, at work, at school and in their neighbourhoods. Care and welfare can be divided into five main sectors: child and youth policy, care for the disabled, care for the elderly, care for ethnic minorities, and local social policy.

Approximately 400,000 professionals work in the field of care and welfare. Many of these have part-time or short-term contracts and work only a limited number of hours. The majority work either in care for the elderly or the disabled. Some 25,000 people have jobs in youth care, and a comparable number work in the field of local social policy. The Netherlands has always had a large number voluntary workers in the care and welfare system. There are 805,000 volunteers working in social care services and 78,000 in socio-cultural work. Volunteers from specific target groups are trained as paraprofessionals to help improve access to services among specific groups.

The provision of care and welfare policies is largely decentralised. Responsibility for services has been delegated to the 462 local authorities at the municipal level, while service support and guidance is the responsibility of the 12 provincial authorities. Central government is responsible for policy development and national infrastructure. Local social policy focuses on increasing opportunities for participation in society by approaching problems comprehensively through an integrated local infrastructure that increases co-operation between service fields, e.g. education, employment, housing, social work and public health.

Legislation on social services is varied. The 1994 Welfare Act (*Welzijnswet*) provides the legal basis for local welfare policies, referring to welfare of the elderly, the disabled, children and young people, nursery care, social services, social care and community development. It requires local authorities to accommodate the spiritual, religious and cultural diversity of the Netherlands. Through government grants, these requirements have become prerequisites for welfare agencies around the country. The Act provides ample scope for agencies to choose their

own quality standards as well as appropriate instruments for quality assessment and monitoring.

The 1994 Act on Provisions for the Disabled (*Wet Voorzieningen Gehandicapten*) made local authorities responsible for allocating resources for housing adaptations and transport services for disabled people. Central concepts in this Act are 'duty to care' and 'instruments for cost containment'. The General Act on Exceptional Medical Expenses (*Algemene Wet Bijzondere Ziektekosten*) created a specific national care fund long-term care. Within fixed spending limits, this budget finances planned care provision to the elderly, people with a chronic illness, physical disabilities, severe learning disabilities or mental illness. The Child and Youth Care Act (*Wet op de Jeugdhulpverlening*) regulates the policies, implementation, financing and control of the majority of child and youth care services, decentralising responsibilities to local and provincial authorities.

Every four years central government presents an evaluation of past activities and a strategy for future welfare policies. The 1998 memorandum on future strategies, 'Working towards Social Quality', outlines five priorities for the next four years: (1) promoting participation and independence, especially among youths and the elderly, in volunteering and in community care for the physically or mentally disabled, and by using sports as an instrument for participation; (2) preventing social exclusion by means of social involvement, integration and support of vulnerable groups; (3) supporting local social policy, focusing on social cohesion at neighbourhood and community level and support networks for children, youth and families; (4) professionalism and quality of care and welfare service providers; (5) research, monitoring and information policies.

## **B. Annotated Bibliography**

### **1. Comprehensive works, overview volumes, classics on social services and the welfare system**

Schuyt, C.J.M. (1991) *Op zoek naar het hart van de verzorgingsstaat*. [In search of the heart of the welfare state]. Leiden: Stenfert Kroese.

This collection of articles discusses ideas underlying the restructuring of the welfare state over the last fifteen years. Themes discussed include welfare state and welfare society, the national budget as a social document, government policy on law and order, education, science and government policies. The author emphasises social developments that are easily overlooked by a government suffering from financial problems.

Schuyt, C.J.M. (1997). *Het sociaal tekort: veertien sociale problemen in Nederland*. [The social deficit: fourteen social problems in the Netherlands]. Amsterdam: De Balie.

This anthology of essays discusses fourteen social problems in modern Dutch society. Every problem is addressed to an expert scientist who is challenged to describe not only the size and character of the problem – with definitions and quantitative data – but also possible ways and means of solving it.

Sociale en Culturele Verkenningen 1999. [Social and Cultural Explorations, 1999]. (1999) Den Haag: Elsevier.

The Social and Cultural Explorations are published annually at the request of the Dutch Parliament. They describe the Dutch way of life and analyse recent developments in government policy. Recurring subjects are public opinion regarding government and its policies, and living conditions among the Dutch population and the service sector. In this issue the living conditions of asylum seekers are also discussed. The 1999 Explorations also discusses the situation in the large cities, with an analysis of differences in education, employment and income. It also describes the development of social and political participation from 1972 to 1998 in relation to levels of social confidence.

## 2. Supply and demand

Kwartel, A.J.J. van der; Smit, R.L.C. (1997). *Branche-rapport gehandicaptenzorg*. [Sector report: care for the disabled]. Utrecht: Nzi.

This is the first attempt to present a comprehensive – mainly quantitative – overview of care for the disabled. This has been achieved for most of the sector. The report deals with the demand for care, services offered, waiting lists and the flow of clients. It provides information on care for mentally, physically and sensory disabled persons, looking at problems experienced and making suggestions for improvement.

Sarneel, H.A.E.; Paur, M. (1996). *Bewogen in beweging: een bedrijfskundige benadering van de maatschappelijke opvang*. [A management approach to ‘social sheltering’]. Utrecht: Federatie Opvang.

This book describes social services for the homeless, social shelters, women’s shelters, general crisis relief and church shelters. It concentrates on the positioning of social care services, their products, processes and outcomes, and develops a budgeting reference model.

### 3. Definition, forms and types of social services

Yperen, T. van, Rest, E. van, Vermunt, C. (1999). *Definitie van kernbegrippen: programma's in de jeugdzorg*. [Definitions of core concepts: programs in youth care]. Utrecht: NIZW.

This publication includes working definitions of a number of key concepts in care programming. The definitions, the result of elaborate consultations, are given the character of an agreement or contract between state representatives and child and youth care agencies. This unity of language and communication will serve to further the field.

Stouw, G. van der, Alblas, C., Belt, T. van den. (1993). *Maatschappelijk werk: werkvelden*. [Social work: fields of work]. Groningen: Wolters-Noordhoff.

The authors present a description of a number of fields of social work: general social work, concrete services, home care, social work in health care, probation services, victim support and company social work.

### 4. Organisational aspects, forms, ownership, and auspices of providers

Gelauff, M. (1995). *Op basis van betrokkenheid: Algemeen maatschappelijk werk en ethiek van zorg*. [On a basis of commitment: general social work and the ethics of care]. Utrecht, Uitgeverij SWP, Stichting Welzijns Publikaties.

This research into social work was motivated by the suspected gap in communication between management and workers in social work agencies. The first analysis showed that social workers are confronted with a moral dilemma when facing the tension between goals set by management and appeals made by clients. The author believes good quality of care is a responsibility that social work agencies take on behalf of society, and which professional workers try to deliver. This is not an easy job, therefore the author pleads for an open, communicative and supportive culture with workers to guarantee quality of work.

Meijs, L.C.P.M. (1997). *Management van vrijwilligersorganisaties*. [Management of voluntary organisations]. Utrecht: Nederlandse Organisaties Vrijwilligerswerk. The aim of this study is to develop concepts, insights and theories of use to board members, managers and volunteers in governing and managing voluntary organisations. The central part of this study comprises case descriptions of three national voluntary organisations.

## 5. Financing

Kerff, R.G.H.G. (1999). *Persoonsgebonden budgetten in de ouderenzorg: invoeringsmogelijkheden in de thuiszorg en de verzorgingshuizen*. [Personal budgets in care for the elderly: possibilities of implementation in home care and in nursing homes]. Rotterdam: S.N.

This is a doctoral thesis on the implementation of personal budgets in the care for the elderly, in particular home care and nursing home care.

Schrijvers, A.J.P. (1993). *Een kathedraal van zorg: een inleiding over het functioneren van de zorgverlening*. [A cathedral of care: an introduction to the functioning of care services]. Utrecht: De Tijdstroom.

This publication explains the why and how of the financial structure of the care system. It deals with definitions, theories, case studies and dilemmas in the delivery of personal social services.

## 6. Staff and volunteers

Belt, T. van den, Timmerman, K. (1998). *Vrijwilligerswerk: beleid en begeleiding*. [Voluntary work: policy and guidance]. Baarn: Nelissen.

Volunteering is an important aspect of social work in the Netherlands. This study formulates theoretic insights on the policy of volunteering, support for voluntary workers, and the translation of these concepts at various levels of an organisation. A social, theoretical and organisational positioning of voluntary work allows supervisors, paid professional workers and policy makers in organisations to develop their own views on voluntary work. The authors opt for a coaching style of supervising voluntary workers, in which motivation, responsibility and satisfaction are key issues.

Gelauff-Hanzon, C., Keune, C., Tan, S. (1999). *Paraprofessionals: pioniers of pionnen?: een onderzoek naar de voorwaarden voor een optimale inzet*. [Paraprofessionals: pioneers or pawns? An investigation of the conditions for optimal commitments]. Utrecht: Verwey-Jonker Instituut.

The authors present a study into necessary the conditions for the optimal use of paraprofessionals in care services.

Hens, H.A.M., Geomini, M.A.A.G. (1996). *Maatschappelijke dienstverlening: beroependomeinprofiel*. [Social service delivery: a profile of professions]. Utrecht: NIZW.

This publication describes the main characteristics of the domain of social work,

the professional behaviour of social workers, their qualification requirements and levels of qualification, the variations in operation of the profession, and the functions that social workers have in organisations.

Roering, S., Geleen, K., Spaans, M. (1995). *De zorg, een last? Psychische belasting en ziekteverzuim in verzorgingshuizen*. [Is care work a burden? Psychological stress and sick leave in nursing homes]. Utrecht: NcGv.

This publication paints a picture of the labour conditions and personality characteristics that play a part in the development of mental stress among care workers. When workers feel over-stressed, objective indicators such as a higher level of mental complaints and more frequent and longer sick leave are evident.

Stouw, G. van der, Jongman, H. (1993). *Maatschappelijk werk: theorie en methoden*. [Social work: theory and methods]. Groningen: Wolters-Noordhoff.

This publication describes the history of general social work, the need for assistance and the possibilities of social work, emphasising workers' professional profiles and professional attitudes.

## 7. Clients, users and consumer issues, profiles

Franken, J., Gils, M. van, Gortworst, J. (1999). *De maatschappelijke opvang in cijfers 1997*. [Statistics on social care shelters, 1997]. Utrecht: Federatie Opvang.

This publication offers quantitative data on client groups involved in women's shelters, general crisis shelters and shelters for the homeless. No data have been included from the users of group living schemes, hostels and church shelters.

Stouw, G. van der, Bouwman, J., Bunschoten, P.(1993). *Maatschappelijk werk: doelgroepen*. [Social work: target groups]. Groningen: Wolters-Noordhoff.

This publication describes a wide variety of social work target groups: the elderly, young people, women, migrants, disabled people, substance abusers and political refugees.

Westerhove, F. van, Loveren-Huyben, C. van. (1997). *Zorg voor medewerkers: onderzoek naar de benodigde kwaliteit en kwantiteit van de medewerkers in het verzorgingshuis nieuwe stijl in het jaar 2002*. [Care for employees: research into the necessary quality and quantity of employees in the new style nursing home in 2002]. Beuningen: Van Loveren & Partners.

The central issue addressed in this book is whether nursing homes will be able to offer adequate care in the year 2002 given their present staffing and the growth of a new and expanding target group of frail elderly with an extensive need for care.

Winter, M. de (1995). *Kinderen als medeburgers: kinder- en jeugdparticipatie als maatschappelijk opvoedingsperspectief*. [Children as fellow citizens: children and youth participation as a perspective of social need]. Utrecht: De Tijdstroom.

In modern society children lack space to practice the social skills and attitudes that society will expect when they become adults. When they fail they are said to have insufficient values, to ignore social rules and regulations, to lack an interest in politics and to be led by materialism and self-interest. Therefore the author argues in favour of children and young persons' active participation in matters that influence their situation, for example in dealing with their home and school environment. Participation is seen as an essential condition for good social and moral development and for improving individual well being. The author explains that seeing children primarily as a problem is counter effective to a participation perspective that sees children's position and opportunities through a modern view of citizenship and citizen education. She describes how pedagogic and developmental psychology deal with this. Finally a number of cases are presented to illustrate the meaning of participation in local youth policy, education and professional child and youth care.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Goewie, R. (1997). *Kwaliteitsbeoordeling in de maatschappelijke opvang: de ontwikkeling van een extern kwaliteitssysteem maatschappelijke opvang*. [Quality judgement in 'social sheltering': the development of an external quality system]. Utrecht: Verwey-Jonker Instituut.

This publication describes a project that aimed to list the quality criteria and standards of social services, looking at the most useful quality system for generating independent information on these aspects. A number of pilot projects were run with shelters for the homeless, hostels, women's shelters and sheltered group living schemes in the four largest cities in the Netherlands. The quality criteria were then developed from the perspectives of central government, care providers and clients.

Jacob, R., Aarsen, T. van, Akbulut, M. (1996). *Een kwestie van lange adem: ervaringen met het toegankelijk maken van algemene instellingen voor allochtone ouderen*. [A matter of patience: experiences with making general institutions accessible for elderly migrants]. Utrecht: NIZW.

This report presents the experiences of five institutions that began co-operating to lower their thresholds for migrant elderly people. From the start their efforts were accompanied by self-evaluations. Workers relate the different ways migrants started using social services: how Surinam elderly entered nursing

homes, how Chinese elderly people started to consult counsellors for the elderly, and how Turkish and Moroccan elderly find their way to service centres, social work and community building agencies.

Snijders, J., Splunteren, P. van. (1996). *Pleisters plakken of verbanden leggen?: hulpverlening aan vluchtelingen in beeld*. [To bandage or make connections?: a sketch of service delivery for refugees]. Utrecht: NIZW.

This book describes the results of a study into services for refugees. A central issue is the inaccessibility of general primary care services for refugees, especially social work and social-cultural work. Findings show that there is no need for new care services for refugees; the policy on newcomers and the existing care offer sufficient points of reference. However, it is necessary to make better use of existing services by increasingly tailoring them to refugees' needs and co-operating with other relevant agencies.

## 9. Patterns of relations among providers

Berg, G. van den (1995). *Samenwerking in de opvang*. [Co-operation in sheltering]. Utrecht: Federatie Opvang.

This book describes five projects in which a social care provider co-operates with services in other fields.

Rijcken, J.J.F. (1997). *Samen werken aan welzijn: een gemeenschappelijke onderneming van burgers, overheid en welzijnswerk*. [Co-operation for well-being: joint undertaking by citizens, government and social work]. Utrecht: Uitgeverij SWP.

This is a study into the success and failure factors of co-operation between the three areas of work that are the most important pillars for local social services policy: general social work, social cultural work and welfare work for the elderly.

Rossum, H. van, Rossum, F. van. (1999). *Om stenen en handen: samenwerking van woon- en zorginstellingen*. [For stones and hands: co-operation between housing and care institutions]. Den Haag: Elsevier.

Care for the elderly, the disabled, and mentally ill are undergoing a metamorphosis. Residential care is being transformed into home care. Where intramural care earlier provided residence, care and service by one provider financed by one source, separate service providers are now co-operating to deliver different aspects of the service. This publication explores the separate worlds of housing and care by looking back at the development of intramural care, describing ten case studies of co-operation among providers and provoking debate on care practice and policy.

Tenhaeff, C., Eggermont, J., Mertens, H. (1994). *Partnership als middel om sociale uitsluiting aan te pakken*. [Partnership as a means to combat social exclusion]. Utrecht: NIZW.

This study searches for forms of co-operation that demonstrably contribute to the social participation of economically and socially excluded people. Partnership is an important strategy to change this situation. It involves three forms based on a Dutch model under the third EU Poverty Programme: equal co-operation between citizens and professionals, macro-level co-operation between professionals, and active involvement of policymakers and politicians. The publication focuses how this strategy was developed in EU Action Programme projects (1990-1994) and which results have been achieved.

## 10. Innovation and change

Bogaard, D. van den (1995). *Gewoon anders: vernieuwingen in de maatschappelijke opvang*. [Simply different: innovation in 'social sheltering']. Utrecht: NIZW. This book describes seven innovative projects in service provision for people with serious material and psychosocial problems. It provides opinions on various dilemmas, such as unsolicited help, which these innovative projects face and which are elemental for social care.

Groot, R. de, Ketelaars, A.P.M., Maaskant, H. (1999). *Innovatie in de zorgsector*. [Innovation in the care sector]. Maarssen: Elsevier/De Tijdstroom. This overview of 230 trend-setting projects in care services describes the objectives and methods of each care innovation project. Projects are listed by target group, distinguishing between the elderly, disabled, chronically ill and care workers. An additional CD-ROM lists over 3,600 projects in the period 1995-1999.

Jansen, L., Lammers, B. (1999). *Gekte in de stad, de stad een gekkenhuis?: op weg naar een nieuwe praktijk*. [Madness in the city, the city a madhouse? On the way to a new practise]. Amsterdam: De Balie.

At the request of the municipal authorities of Amsterdam a number of discussions took place in 1998 to exchange views about the necessity, form and content of the social debate on psychiatry in the city. This was followed by the development of 'the Amsterdam model'. One of the principles of this model is that (ex) psychiatric patients should be able to live independently in any neighbourhood. This presupposes the presence of a supportive neighbourhood infrastructure and the necessary service provision. The publication outlines the process of mapping these provisions within the city of Amsterdam.

## 11. European Union and globalisation issues

Avramov, D. (1998). *Youth homelessness in the European Union*. Brussel: FEANTSA.

Avramov provides a wide-ranging overview of the various causes, issues and approaches to the problem of homelessness among young people in western Europe.

Gaskin, K., Smith, J.D. (1995). *A new civic Europe?: a study of the extent and role of volunteering*. London: The Volunteer Centre UK.

This publication, requested by the Nuffield Foundation and the European Commission, presents a study into the character and size of volunteering in Belgium, Bulgaria, Denmark, France, Germany, the Netherlands, Ireland, Slovak Republic, Sweden and England.

Serail, S., Vissers, A. (1993). *Sociale Uitsluiting in Nederland: feiten en beleid in een Europees kader*. [Social exclusion in the Netherlands: facts and policy in a European framework]. Bunnik: Nederlands Centrum voor Sociaal Beleid.

The authors present a comparative study into the situation and policies relating to social exclusion, identifying differences and similarities between the Netherlands and other EU member states. The study describes the recognition of social exclusion and the factors causing lower participation rates among some groups. It presents a number of key data on the level of social exclusion in several social fields and draws conclusions with regard to Dutch policy in the areas in question.

## 12. Bureaucratisation and/or commercialisation problems

Laan, G. van der. (1990) *Legitimatieproblemen in het maatschappelijk werk*. [Legitimation problems in social work], Utrecht: Uitgeverij SWP.

The problems of legitimacy which the field of social work faces are described in this book through concepts developed by the German philosopher and sociologist Habermas. Case descriptions are then provided, from which suggestions and instruments for social workers are offered.

## 13. Comparative, cross-national issues

Rostgaard, T., Fridberg, T. (1998). *Caring for Children and Older People: a comparison of European policies and practices*. Copenhagen, Denmark: The Danish National Institute of Social Research.

This book addresses the social care systems for children and older people in Denmark, Finland, Sweden, England, the Netherlands, France and Germany. The authors provide an overview of the historical development of care policies and the organisation, financing and provision of care in each country, as well as a comparative analysis of care systems.

Hazekamp, J.L., Jumelet, H. (1993). *Overal en nergens: stijlen van aanpak van thuisloze jongeren in Nederland en omliggende landen*. [Everywhere and nowhere: styles of dealing with homeless youth in the Netherlands and adjacent countries]. Utrecht: Uitgeverij SWP.

This work provides research-based insights into the background and developmental stages of homelessness which are considered important for effective provision of care and assistance. Case studies drawn upon deal with methodical innovations in shelter and care work. Government policies which focus on conditions for the development and implementation of methods are described and comparisons are made regarding how Denmark, Ireland, Belgium and Great Britain address the problem of homeless youths.

Shardlow, S., Payne, M. (1998). *Contemporary issues in social work: Western Europe*. Aldershot: Arena.

This review of significant developments in social work practice and education across a range of European countries includes a chapter on 'Social work in the Netherlands' (p. 77-91, p. 170-172) by G. van der Laan and R. Ploem.

## 14. Current trends and policy issues; predictions

Kwekkeboom, M.H. (1999). *Naar draagkracht*. [Means-testing]. SCP Cahier 158. Den Haag: Elsevier.

In the field of mental health care a process of deinstitutionalisation has begun in an effort to improve psychiatric patients' integration into society. This book discusses important elements of this process, such as offering care services to ex-psychiatric patients outside residential institutions or psychiatric hospitals, and cooperating and transferring tasks to different agencies and services in the field of housing, care and welfare. The author describes that while public opinion favours this change and its related policies, support for this process is only slowly increasing in the agencies and services involved.

Voorn, M.C., Meijer, P. (1999). *Nederland wordt ouder: meningen over ouderenzorg en ouderdom*. [The Netherlands are ageing: opinions about old age and care of the elderly]. Amsterdam, NIPO.

This study was executed at the request of a national daily newspaper (Trouw). It provides an inventory of Dutch opinions on the subject of ageing and contains a short description of outcomes.

Zevenbergen, H. (1996). *Veel culturen, één zorg: begeleiding van mensen met een verstandelijke handicap uit een andere cultuur*. [Many cultures, one care: guidance of the mentally handicapped with a different cultural background]. Baarn: Nelissen.

This publication sheds light on possible discrepancies in norms and values regarding perceptions of mental disability, education, communication with children and adults with disability, and standards and expectations about the provision of care. It describes a way of working which helps care givers gain insight into the role of culture – both their own and others – and assists them in making the right choices in the course of their work.

## 15. Other topics

VOG. (1997). *Een versleten jas?: ondersteuning van mantelzorgers door het welzijn ouderen en het algemeen maatschappelijk werk*. [A worn out coat: support of informal carers for the elderly by general social work]. Rijswijk: VOG.

In care for the elderly and general social work, the problem of informal carers becoming overburdened is under recognised. Thus one important task is to trace informal carers, particularly those already overburdened or threatened with becoming so, and to raise awareness of the problem. This publication provides examples of support projects for informal carers and a checklist of issues to be aware of when organising support activities.

Mercken, Chr. (1997). *Gedeelde werelden: peuters op bezoek in verzorgings- en verpleeghuizen*. [Shared worlds: toddlers visiting nursing homes]. Utrecht: NIZW.

This is a practical guide for setting up and implementing a project for young children to visit nursing home residents, providing an important stimulus for elderly people. Advice is given on how to stimulate interaction between youths and the elderly and which activities to undertake.

Sociaal-Economische Raad (1998). *Arbeid, zorg en economische zelfstandigheid*. [Work, care and economic independence]. Den Haag: SER.

The Social Economic Board of Advisers discuss the inter-relatedness of paid employment, care for family members and others, and economic independence. The Board gives its views on future policies in this field and promotes regulations that combine employment, care and income support.

Struijs, A., Brinkman, F. (1996). *Botsende waarden: etische en etnische kwesties in de hulpverlening*. [Competing values: ethical and ethnic issues in service delivery]. Utrecht: NIZW.

When dealing with migrant clients, to what extent do caregivers need to account

for cultural and moral values that conflict with their own? This book offers a theoretical (ethical) and practical framework to discuss this question. It describes the coherence between culture, religion and morals, the relationship between majority and minority population morals, and the extent that care workers can draw from their own moral point of view.

## C. Special Fields

### Child and Youth Welfare

Geene, H. (1994). *Herziening van het stelsel van jeugdbescherming en jeugdhulpverlening: met het oog op de 21e eeuw*. [Review of the system of youth protection and youth care: a view to the 21st century]. Utrecht: Uitgeverij SWP.

The two themes treated in this book are (1) the connection between child protection and child and youth care, and (2) the connection between non-residential and residential care. After an overview of developments in the former over the last twenty years, the author draws a set of criteria to illustrate the strong bond between child care and child protection. The connection between non-residential and residential care is demonstrated in the case of out-of-home placements. The author suggests that problems arising in out-of-home placement can be solved by allocating a specific budget for placements to each placement agency. Finally, the author argues for greater opportunities to try out a variety of organisational models in order to determine the place of child protection and child and youth care through a natural process.

Hermanns, J., Nijnatten, C.H.C.J. van, Smit, M. (1998). *Handboek Jeugdzorg: methodieken, zorgprogramma's en doelgroepen, deel 1*. [Handbook for youth care: methods, care programmes and target groups, part one]. Houten: Bohn Stafleu Van Loghum.

This book provides an overview of theory, practice, policy, history and future perspectives on child and youth care. It addresses in particular: child protection, child care and mental health care of children and young persons.

Tilanus, C.P.G. (1997). *Jeugdbeleid*. [Youth policy]. Utrecht: Uitgeverij SWP. After sketching child and youth policy in the Netherlands, the author outlines the consequences of treating children and young people as a special policy category. Subsequently the full scope of child and youth policy is presented, followed by a description of three central components: general child and youth policy, preventive policy and the marginal areas of child and youth care.

## Family Services

Grotenhuis, S., Zwaard, J. van der. (1997). *Kiezen voor kinderen*. [Choosing for children]. Utrecht: Elsevier/De Tijdstroom.

Three themes are dealt with in this publication. The book opens with three articles dedicated to the debate on family policies. This is followed by academic discussion of the scope and the limitations of sociologist Abraham de Swaan's analysis of the family as a 'negotiation unit'. In the third section of the book, the choice of having and raising children is discussed.

Kemp, R.A.T. de, Veerman, J.W., Brink, L.T. ten. (1998). *Evaluatie-onderzoek Families First Nederland*. [Evaluation-research of Families First Netherlands].

This publication combines the five earlier evaluation studies of the experimental implementation of Families First in the Netherlands. These evaluations illuminated the success of the approach, leading to wider acknowledgement of Families First as a valuable contribution to the family support and preservation services, and subsequently to the implementation of the program throughout the country.

Zwaard, J. van der. (1995) *Hoe vrouwen moederen: buurtgesprekken over opvoeding*. [How women mother: neighbourhood conversations about raising children]. Utrecht: Uitgeverij SWP.

Moroccan, Turkish, Dutch, Surinam, Cape Verde Islanders and Croatian mothers and grandmothers living in multicultural neighbourhoods in Rotterdam discuss the daily realities of motherhood. These discussions form the basis of the Dutch Mothers Inform Mothers (MIM) project, a Dutch community-based early childhood care and development support programme.

## Frail elderly, nursing homes, long-term care

Windt, W. van der, Calsbeek, H., Hingstman, L. (1998). *Verpleging en verzorging in kaart gebracht*. [Nursing and care mapped]. Maarssen: Elsevier/De Tijdstroom.

This publication extensively and quantitatively map the nursing and caring professions in the Netherlands between 1990 and 1996. The authors discuss the demand for nursing and caring, the size of the professional groups, the composition of staff, labour circumstances, training, functions and incomes. They then present the results of research into the flow of employees and the motives of people who leave their jobs.

## Disabled

Leemans, E., Nieuwenhuizen, C., Vermeulen, H. (1997). *Samen werken aan integrale vroeghulp: een handleiding voor de praktijk*. [Working together for integral early help: handbook for practise]. Utrecht: NIZW/Stichting Dienstverleners Gehandicapten.

This publication provides workers in the field of parent support some instruments for early detection of developmental disorders that may lead to disability. It then offers assistance in the organisation of early intervention.

Schippers, A., Gennep, A. van. (1999). *Een goede vraag, een passend antwoord: fricties in de gehandicaptenzorg*. [A good question, a suitable answer: friction in care for the disabled]. Utrecht: NIZW.

The ten research contributions in this book describe problems in the field of disability. The combination of views and approaches provides an inspiring and educational overview, illustrating the parallels and differences between the various sectors of care for the disabled, and offering solutions from a range of perspectives. The book offers numerous suggestions for innovation in care and improving the quality of care. It provides readers insight into the many facets of care for the disabled.

## Homeless, the poor, poverty

Doorn, L. van, Tabak, L. (1999). *Experts van de straat: nieuwe trends in de dak- en thuislozenopvang*. [Experts in the streets: new trends in shelter for the homeless]. Utrecht: NIZW.

This report, commissioned by a charitable fund, provides an inventory of new trends and innovative case studies in care for the homeless.

Heyendael, P.H.J.M., Nuy, M.H.R. (1992). *Achtergronden van thuisloosheid*. [Background of homeless policy]. Groningen: Wolters-Noordhoff.

This book presented the first research-based overview of the emergence and character of homelessness in its various forms. It maps the various service providers targeting homeless people and attends to the management of care services and the role of the group leader in the process.

Ministerie van Sociale Zaken en Werkgelegenheid (1995). *De andere kant van Nederland: over preventie en bestrijding van stille armoede en sociale uitsluiting*. [The other side of the Netherlands: preventing and combating silent poverty and social exclusion]. Den Haag: Ministerie van Sociale Zaken en Werkgelegenheid. This report was the first indicator of the central government's recognition of the

problem of poverty in the Netherlands. It aims at a comprehensive policy to prevent and eradicate poverty and social exclusion. The report proposes an annual effort to improve information provision through a poverty monitor. It suggests that through annual social conferences, all stakeholders (employers, employees, churches, services, clients) will be able to exchange views.

Vrooman, J.C., Altena, J.W., [et. al.]. (1998). *Armoedemonitor 1998*. [Poverty monitor, 1998]. Den Haag: Sociaal en Cultureel Planbureau.

This joint product of the Central Bureau of Statistics and the Social and Cultural Planning Office presents facts on poverty in the Netherlands, including the number of poor households, developments, and the influence of recent poverty policy. It includes data on patterns of expenditure, income position, health, criminality, and daily occupations and living conditions of poor households. It illustrates the effect of finding employment and the importance of government compensation. It touches upon poverty in rural areas and compares poverty in the Netherlands with eleven other Western countries.

## Unemployed

Braam, S., Hilhorst, P., Leenders, P. (1996). *Sociale spiegel: reflecties op het armoedebeleid in Nederland*. [Social mirror: reflections on poverty policy in the Netherlands]. Amsterdam: IPP, Instituut voor Publiek en Politiek.

This publication makes a critical contribution to the social and political debate on poverty, social exclusion and unemployment. It focuses on the meaning of living in poverty, the mechanisms that cause poverty, and the possibility for governments, institutions and individuals to escape poverty. It also pays attention to existing initiatives to combat poverty.

Olieman, R., Bokhoven, E.F. van, Gravesteijn-Ligthelm, J.H. (1996). *Zorg voor werklozen: een onderzoek naar de toepassing van gesubsidieerde arbeid in de zorgsector*. [Care for the unemployed: an investigation of the implementation of subsidised work in the care sector]. Den Haag: Stg. Organisatie voor Strategisch Arbeidsmarktonderzoek.

This report evaluates special employment programmes in the care sector, focusing on the significance of employment intervention for those involved in the programmes. Three existing employment instruments supported by government are evaluated.

Schilfgaarde, P. van. (1994). *Werk voor iedereen*. [Work for everyone]. Assen: Van Gorcum.

This analysis of the factual development of the labour market and obstacles to combating unemployment in the Netherlands depicts a future in which employ-

ment will be more attainable for all. The point of departure for this prediction is the power of the Dutch urban structure, the quality of public housing, the infrastructure, the education system and knowledge structures. Finally the author sketches a strategy with necessary instruments for fighting unemployment.

Spies, H. (1998). *Uitsluitend voor jongeren?: arbeidsmarktbeleid en het ontstaan van een onderklasse*. [Only for youngsters? Labour market policy and the emergence of an underclass]. Utrecht: Jan van Arkel.

Long term unemployment and the quality of life in pre-war city districts are important problems in the Dutch welfare state. Government attempts to solve these problems through policies aimed at increasing employment has not succeeded. This study into labour market policies follows the effect of these policies and aims to create a more effective policy, especially for unemployed young people.

Veld, E. ter, Uyl, R. den. (1995). *Mensen: gelijke kansen: beschouwingen over en voorstellen voor het verbeteren van de arbeidsmarktpositie van allochtonen*. [People – equal chances: reflections on and proposals for improving the labour market position of migrants]. Den Haag: VUGA Uitgeverij.

This paper contains an introductory chapter describing the character and size of migrant unemployment problems. The paper addresses essential issues including activities by government and social services partners to create a good employment climate for migrants. It contains examples at the meso-level such as job agency, branch organisation and local authority activities, and at the micro-level such as the development of equal opportunities policies by enterprises and businesses.

## Immigrants and refugees

Begemann, F.A. (1994). *Hulpverlening aan vluchtelingen en asielzoekers: mogelijkheden binnen de eerstelijns zorg*. [Service delivery to refugees and asylum seekers: possibilities in front-line care]. Utrecht: Pharos-Steunpunt Gezondheidszorg Vluchtelingen.

This publication asks what primary care workers can do for refugees and asylum seekers. In Part 1, it provides a background on these clients groups, emphasising their commonalties and the process of assimilation they experience in the Netherlands. In Part 2 some general points of departure for relevant care services are formulated. Part 3 describes what general practitioners and social workers can do for refugees.

Snel, E. (1998) *Gekleurde armoede: armoede en bestedingspatronen onder ethnische minderheden*. [Coloured poverty: poverty and spending patterns among eth-

nic minorities]. Utrecht: Forum, instituut voor Multiculturele Ontwikkeling.

This essay lists the ethnic-specific causes of poverty in minority groups. The researcher indicates that there are clear differences in causal factors both between ethnic groups and between households within groups.

Tesser, P.T.M., Merens, J.G.F., Praag, C.S. van. (1999). *Rapportage Minderheden 1999: positie in het onderwijs en op de arbeidsmarkt*. [Report on minorities, 1999: position in education and the labour market]. Den Haag: Sociaal en Cultureel Planbureau.

This report focuses on the expansion of migrant populations in the Netherlands and their increasing diversity due to the arrival of refugees and asylum seekers. Special attention is given to migrants' education level, academic achievements and position in the labour market.

Vermeulen, H., Penninx, R. (1994). *Het democratisch ongeduld: de emancipatie en integratie van zes doelgroepen van het minderhedenbeleid*. [Democratic impatience: the emancipation and integration of six target groups of minority policy]. Amsterdam: Het Spinhuis.

This anthology of articles describes the long term integration processes of Dutch policy targeting six minority groups: Moluccans, Surinamese, Antillians, Moroccans, Turks and Southern Europeans.

## D. Summary assessment of current debates

There are three inter-related current debates in the field of personal social services: those concerned with finance and capacity, client orientation, and participation in society.

**Finances and capacity:** The Dutch welfare system aims to balance a free market economy with co-ordinated control or regulation of social problems. Co-ordination is necessary but tends to increase bureaucracy and lack a strong client-orientation. The challenge is to achieve a balance between requested services and available budgets, taking into account user needs and wishes. Experiments have begun with providing personal budgets to certain client groups, such as the disabled, enabling clients to chose and purchase preferred services or products rather than depend solely on specific services or products offered. In this way clients have greater control over their situation while organisations are forced to compete in terms of both quality and effectiveness.

**Client orientation:** Attention has increasingly shifted toward the needs of clients rather than services available. Subsequently the client is of primary importance in recent care and welfare policies. The issue of needs assessment is being

addressed, with the aim of assisting clients as effectively and objectively as possible. Particular attention is paid to information services that could give clients insight into their own situation, treatment, results, etc., and provide the general public an overview of the diversity of personal social service options. In line with this development is increasing emphasis on the importance of clients remaining independent as long as possible. A move from residential to community and home care facilities has greatly improved client flexibility and options.

**Participation:** The Netherlands has a high labour productivity but a relatively low percentage of people who are active in the labour market. The elderly, long-term unemployed, disabled and others with difficulty working, run the risk of becoming isolated from society. Social activation is an attempt to stimulate these vulnerable groups to develop their involvement in society. It does not necessarily lead to paid employment but draws people out of isolation and toward new engagement with the community. Achieving this requires commitment and co-operation between social benefits agencies, employment services and social services, as well as a new expanse of initiatives and volunteer activities, particularly at community level.

## Portugal

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### A. Synopsis of the Social Service System

While there is no definition of “social services” as such in the Portuguese academic literature, the concept has much in common with the Portuguese concept of “social action”. Social action is a form of social protection aiming to prevent economic and social deprivation and to protect the most vulnerable groups. Vulnerable groups typically include children, youth, the disabled and the elderly, but also refer to others such as the unemployed and substance abusers. Social *action* implies provision of a tangible social *service* to an individual or a family (Segurança Social, 1999a). Most social services fall within this category, however social action excludes certain services for the unemployed such as training. The lack of a clear definition of “social services” is probably a reflection of a wider lack of academic interest in social policy in Portugal in general (Rodrigues, 1999) and in organisations working in the area (Barros and Santos, 1997).

There is no recent academic work on the total size of the social services economy in Portugal. Relevant statistics are presented on a disaggregated level by area of activity and region. However, using existing government statistics (Segurança Social, 1999a and b) the size of the social services economy may be estimated. State expenditure on social services totalled Esc\$108,200,000,000 (Euro 541,000,000) in 1997. This constitutes a dramatic 290% increase since 1990, when expenditure totalled Esc\$ 37,261,000,000 (Mendes, 1995). Donations from individuals in 1997 were approximately Esc\$ 8,000,000,000 (Euro 40,000,000) (Santos, 1997). Figures on company donations and fees are not available, but it is likely that in 1997 total expenditures on social services were well over Euro\$ 600 million. At the end of 1997 social services were being provided to 328,579 users, with a total user capacity of 367,841 persons at any one time, while the social services sector employed 63,400 professional staff. There are no figures on volunteer labour, but it is likely to be substantial given the importance of nonprofit providers in the sector.

Portugal’s mixed model of social service provision resembles that of other EU countries, however with one significant difference: its heavy reliance on informal and family networks. One survey revealed that over 60% of care for pre-school children was delivered by informal networks and the family (Portugal, 1994). A similar picture is likely in other areas of social services provision such as care for the elderly and the disabled, but the total size of the informal sector is unknown. Rather, available data shows social services providers to include state institutions

at national level and increasingly at regional and local levels; a small number of for-profit providers – which were not likely to exceed 500 in 1997; and a dominance of non-profit social services providers – over 3,100 at the end of 1996 (Barroco, 1997). Nonprofit providers include some worker unions, professional associations, church organisations and secular charities. The strength of the church among private (nonprofit and for-profit) providers is a particularly important characteristic of social service delivery in Portugal (Fonseca, 1996).

There is no academic analysis of the relative proportion of services delivered by each type of provider, but calculations based on government statistics (Segurança Social, 1999a and b) again show that nonprofit organisations dominate. For social services that depend on some kind of infrastructure (*equipamentos*), i.e. the majority of social services, nonprofit organisations provided services to 89.1% of all users at the end of 1997 compared with 3.4% of for-profit providers and 7.5% of state organisations.

Formal social service providers finance their activities through fiscal transfers (grants), contracts, donations, and fees. However, the state has the lion's share of spending on social services. It finances public administration and local administration directly, and finances nonprofit providers mainly through contracts. It also makes fiscal transfers to users who then purchase services from nonprofit and for-profit providers. The recently adopted guaranteed basic income model further ties the right to fiscal transfers with consumption of social services.

For nonprofit and state providers the majority of funding comes from contracts or 'agreements' (*Acordos*) with the state, which provides payments corresponding to the number of users at each organisation, up to an agreed quota. These contracts are further supplemented by user fees, donations and volunteer labour. Private providers, on the other hand, have no contract with the state and thus cater to users able to pay for services. Analysis of government statistics for 1997 (Segurança Social, 1999a and b) reveals that 83.1% of users were covered by contracts in eligible services. Nonprofit providers alone received state money from contracts covering 95.6% of their users. Nonprofit providers are thus very dependent on state contracts. In contrast, informal social services providers mainly use their own (private) income to finance services.

Social services have a privileged position in the Portuguese law system. The Constitution establishes the right to social rights (9<sup>th</sup> Article) and a system of social security (63<sup>rd</sup> Article). It establishes the basis for economic support by the state for nonprofit organisations working for the public welfare (Article 63rd). The Civil Code outlines the basics of the social security system, including models of delivery and financing (*Decreto lei no. 35/96*, May 2nd, *Lei Orgânica do Ministério da Solidariedade e Segurança Social*), regulation of nonprofit providers (*Decreto lei*

no. 119/83, February, 25<sup>th</sup>) and guaranteed basic income (*Decreto lei no. 19 – A/96* from July, 29<sup>th</sup>).

## A. Annotated Bibliography

There are few direct references to the concept of social services in the Portuguese academic literature. However, social services are addressed, although sometimes minimally, in publications on social action, social work and social policy.

### 1. Comprehensive works, overview volumes, classics on social services and the welfare system

Sousa Santos, Boaventura. 1994. *Pela Mão de Alice: o social e o político na Pós-Modernidade*. [For the mother of Alice: the social and political in post-modernity]. Oporto: Afrontamento.

This is a complex and rich volume that analyses various sociological propositions about Portugal in a moment of post-modernity. The author proposes that the concept of the “welfare society” (*Sociedade-Providência*) be used alongside the concept of the “welfare state” in order to understand social service provision by non-state institutions such as the family and the church. The welfare state in Portugal never really developed in the way other European welfare states developed. Portugal is a country of intermediary development. As such some of its social characteristics approximate the Portuguese society to the North (e.g., legislation, some consumption practices) while others approximate society to the South (collective infrastructure, type of industrial development). Thus it is not easy to understand Portuguese society (e.g., state – civil society relation) through theories developed for either Northern or Southern societies.

Carreira, Henrique M. 1996. *As Políticas Sociais em Portugal*. [Social policy in Portugal]. Lisbon: Gradiva.

This is a classic text for the analysis of social policy in Portugal. The bulk of its analysis centres on education and health but there are important insights into other areas of social service provision as well. The welfare state in Portugal is under increasing financial crisis due to rising social needs (i.e. the ageing population) and the stagnation of income. The crisis in the welfare state has three dimensions: (1) *Financial* crisis, as the increase in social spending is greater than the increase in economic growth. Often financed through growth in public debt it cannot continue forever. (2) A crisis of *legitimacy*, because the most vulnerable are not protected; rather those better informed and positioned in society are those who benefit. (3) Crisis arising from centralisation, bureaucratisation and lack of transparency. The author further argues that changes in the welfare sys-

tem must be of a more fundamental nature rather than incremental adaptations. The author sees Portugal in the third lane in the EU next to Greece in terms of social security.

Esping-Andersen, G. 1993. "Orçamentos e democracia: o estado-providência em Espanha e Portugal, 1960–1986". [Budgets and democracy: the welfare state in Spain and Portugal]. *Análise Social*, 28 (122): 589-606.

This study constitutes an important examination of the relation between social welfare and the recently developed democratic regime in Portugal. The author argues that the cases of Spain and Portugal show there is not an unequivocal relation between democracy and redistribution policies. Unlike most Western European countries with democracies predating World War II, democracy in Spain and Portugal is a recent development. During dictatorships there was little concern with social redistribution issues. This attitude changed dramatically in the 1970s but it is unclear whether the change was a result of stronger economic growth, the hesitating problems of economic liberalisation, Portugal's desire to join the EU, or social discontent. Most likely it was due to a combination of these factors.

Rodrigues, Fernanda. 1999. *A Assistência Social e Políticas Sociais em Portugal*. [Social assistance and social policies in Portugal]. Lisbon: Instituto Superior de Serviço Social and Centro Português de Investigação e História em Trabalho Social.

The author analyses social assistance in Portugal from 1970 to the early 1990s. She argues that social assistance is an area of state polity even in models where the state is less committed to welfare. She describes how after transition periods there is a search for "renewed" discourses on social assistance and social service provision. She traces the ever-changing scenario from developmentalist (during the dictatorship) to liberalisation (today), passing through the socialist influence of the revolution and the normalisation interventions of the IMF until Portugal's "negotiated" admittance to the EU. This is an important historical analysis of the evolution of attitudes toward social services and the welfare state in the past thirty years. It clearly shows the constant state of transition in the sector during that period.

Mozzicafredo, Juan P. 1994. "O estado-providência em transição". [The welfare state in transition]. *Sociologia*, no. 16: 11-40.

In this article the author argues that social policy and social services provision must be understood within the wider concept of the 'welfare state'. He identifies four main defining factors of the welfare state in Portugal: democracy that shapes the demand for social services; the expansion of social and work rights; the consolidation of norms aiming to reduce inequality; and the institutionalisation of associative rights, participation and partnership between the state and other

social actors. The structural dimension of the welfare state is based on the contractual model of social intervention and the regulation of social life, which have important consequences for the model of social services provision.

Mendes, Fernando Ribeiro. 1995. "Por onde vai a segurança social portuguesa?". [Where is Portuguese social security going?]. *Análise Social*, 30 (131-132): 405-429.

The author examines the evolution of the Portuguese welfare state. He argues that the welfare state had a late development in Portugal, after 1974. He uses statistics to show that state spending on social services increased significantly between 1990 (Esc\$ 37,261,000,000) and 1993 (Esc\$ 71,652,000,000). The ageing population and potentially high levels of unemployment (small now but likely to increase as Portugal modernises its economy) will pose the main problems for the financing of social service provision in the future.

## 2. Supply and demand

Branco, Francisco. 1991. "Municípios e políticas sociais em Portugal". [Municipalities and social policies in Portugal]. *Intervenção Social*, no. 5/6: 21-35.

This article constitutes one of the few academic works on the role of local government in policy-making and in the implementation of social services. The author argues that relations between central government and local government are marked by a conflict between autonomy and dependence. He points to the following tendencies in local government social services delivery: (1) stabilisation of the number of social services infrastructure locales; (2) increased importance of service provision and creation of partnerships with other social actors; (3) increased financial transfers to local nonprofit providers; and (4) substantial organisational and human resources development in the area of social services.

Branco, Francisco. 1998. *Municípios e Políticas Sociais em Portugal, 1977-1989*. [Municipalities and Social Policy in Portugal, 1977-1989]. Lisbon: Instituto Superior de Serviço Social.

This book was distributed too late for a full description to be provided. It is however a core work in the field of local authorities and social policy in Portugal.

Hespanha, Pedro. 1996. "Novas perspectivas sobre os direitos sociais". [New perspectives on social rights]. *Intervenção Social*, no. 15/16: 121-130.

The author analyses new perspectives on social rights, arguing that the relation between the state and citizens in Portuguese society does not correspond to the social democracy model as politicians in Portugal often claim. Rather, it continues to be dominated by a clientelistic logic that degrades social rights into the seeming benevolence of rulers, and converts users of the system into clients of state

bureaucracy. Also, because social policies are conceived as measures to compensate individualised social risks there is a lack of articulation of different policies.

Cabral, Manuel Villaverde. 1995. "Equidade social, Estado-Providência, e sistema fiscal: atitudes e percepções da população portuguesa". [Social equality, the welfare state, and the fiscal system: attitudes and perceptions of the Portuguese population]. *Sociologia*, no. 17: 9-34.

This article analyses the results of a large survey (n=2,500) undertaken in 1994 on public attitudes toward the welfare state and public policy priorities. Among its interesting findings is that most people think the welfare state is insufficient or bad. Only 1/6<sup>th</sup> of the respondents thought it was good or sufficient. People from higher classes and aged between 45–64 tend to be the most critical of the system. There is a strong resistance toward paying fees for public services – they should be financed out of taxation. In terms of social priorities the most important groups according to respondents are the elderly (69%), followed by the disabled (53%), children (35%), unemployed (33%) and substance abusers (12%).

### 3. Definition, forms and types of social services

The social services are not defined in the Portuguese academic literature, nor are there typically references to definitions of social services in foreign literature. However, a definition and typology is offered in the following government publication.

Segurança Social. 1999a. *Estatísticas da Segurança Social 1997 – Volume II – Acção Social*. [Social security statistics 1997, Volume II, Social Action]. Lisboa: Instituto de Gestão Financeira da Segurança Social.

This volume contains detailed statistics about social services provision in Portugal. Its author is the state organisation responsible for social security. Social services are grouped into the following categories: (1) Children and youth services, including nurseries, some types of professional home care, nursery schools, and homes. (2) Family and community services, including social work support, home support, refectories, and detoxification programmes. (3) Disabled services, including homes and work therapy centres (4) Elderly services, including homes and day centres. Most social services provision is organised around this state-defined typology due to state influence as the main finance provider for social services.

#### 4. Organisational aspects, forms, ownership and auspices of provider

Fonseca, Carlos D. 1996. *História e Actualidade das Misericórdias*. [The history and current state of Misericórdias]. Mem Martins: Editorial Inquérito.

This is the reference text on the history and current state of the most important church charitable institutions for social services provision: the *Misericórdias* (meaning mercy, compassion, commiseration). *Misericórdias* have existed in Portugal for almost 500 years and according to the author can be found nowhere else in the world. Throughout Portugal's history they have provided relief to the poor and destitute. In the socialist revolution they suffered the worst blow. Their hospitals became state property and were integrated into the national health system, and their administration passed on to state bureaucracy. But as a result, the *Misericórdias* increased their service provision in other needy sectors such as for children and the elderly, which they still maintain today. The author points toward the extensive role of these organisations in social services provision, as well as some of their deficiencies, such as amateurism and paternalism.

Barros, Carlos P. and Santos, José G. (Eds.). 1997. *As Instituições Não-Lucrativas e a Acção Social em Portugal*. [Nonprofit institutions and social action in Portugal]. Lisbon: Vulgata.

This is the only book dealing directly with nonprofit organisations and social service provision. It is a collection of seventeen conference papers presented in Lisbon in 1997. In the first part the papers cover a wide range of issues relating to nonprofit organisations, including causes of growth, legal framework, state financial support, incentives for donations, and service provision. In the second part case studies of nonprofit organisations are presented. In the third part papers cover social services provision and their financing. The fourth part discusses the future of nonprofit organisations and social service provision.

Nunes, João Arriscado. 1995. "Com mal ou com bem, aos teus te além"; as solidariedades primárias e os limites da sociedade-providência". [For better or for worse, care for those close to you: primary solidarities and the limits of the welfare-society]. *Revista Crítica das Ciências Sociais*, no. 42: 5-25.

The author refutes the traditional idea of the welfare society (private welfare service provision, formal and informal) as a survivor of rural and pre-modernity roots, destined to disappear under urbanisation and modernisation. Instead the concept is recuperated and codified as a post-modern response to the solidarity deficit in the capitalist age. Increasingly protection roles that were previously the responsibility of the state are transferred to civil society. This process is generally accompanied by a tendency to overlook the limits of the welfare society. The author concludes by identifying and discussing some of these problems, especially those pertaining to social relations that give form to the welfare society.

Branco, Francisco. 1995. “*Municípios e políticas sociais em Portugal (1977–1989)*”. [Municipalities and social policies in Portugal, 1977–89]. *Intervenção Social*, no. 11/12: 183-208.

The author describes the role of local government in social service delivery in Portugal. He presents a table explaining the role of local government in various areas of social policy and relevant legislation: social security, health, education, housing, and social services. He argues that local government has only a supplementary role in social services provision, complementing central government provision. Local government tends to concentrate its provision on the most vulnerable groups, but their involvement in social service delivery has been growing through partnerships with central state bodies and local actors. He ends by comparing the role of local government provision in Portugal and other European countries.

Portugal, Sílvia. 1995. “A Família e o estado nos cuidados das crianças”. [The family and the state of childcare]. *Interacções*, no. 3: 103-127.

This article examines the roles of the family and the state in childcare. The author’s survey reveals that childcare services are essentially performed by the family, frequently supported by relatives and friends. She offers evidence about who takes care of children according to their relation to the child. She argues that women have a central role within caring networks, and as women increasingly integrate into the labour market this caring will become more fragile. In terms of formal care, nonprofit organisations provide the vast majority of child care, while the state provides only for 9.5% of children, and for-profit organisations provides for even less. But informal childcare dominates, with 63% of children cared for by mothers or relatives. The importance of informal networks in the provision of social services is often noted but this article is one of the few that provides empirical evidence to support its claims.

## 5. Financing

Barros, Carlos P. 1997. “O financiamento da Acção Social em Portugal”. [Financing social action in Portugal]. Pp. 315-325. In Barros, Carlos P. and Santos, José G. (Eds.). 1997. *As Instituições Não-Lucrativas e a Acção Social em Portugal*. [Nonprofit institutions and social action in Portugal]. Lisbon: Vulgata.

The author describes a model for financing social services in Portugal. Through econometric calculation he finds that state subsidies to nonprofit providers is positively related to the number of users and negatively related to the population density in the district area and the number of staff. This shows that the nonprofit organisations capturing more state financing are the most efficient organisations (with more users per members of staff) located in financially integrated districts without high population density. The author concludes that results point to

a regional equity tendency inserted into the social equity policy, demonstrating efficiency in the distribution of resources from the state to nonprofit providers.

Cardona, Celeste and Santos, J. Gomes. 1997. “Apoio fiscal do estado às instituições de solidariedade social”. [Financial support by the state to institutions of social solidarity]. Pp. 75-86. In Barros, Carlos P. and Santos, José G. (Eds.). 1997. *As Instituições Não-Lucrativas e a Acção Social em Portugal*. [Nonprofit institutions and social action in Portugal]. Lisbon: Vulgata.

The authors review arguments for state financial support of nonprofit providers. They identify legal-constitutional, social and economic reasons. Analysing the fiscal system and tax exemption regime applied to nonprofit organisation, they conclude that nonprofits have ‘survived’ various attempts to revise and reduce their fiscal benefits by demonstrating valuable performance. Moreover the existence of fiscal benefits to nonprofit organisations with a social mission is in line with current practice in the EU.

Santos, J. Gomes. 1997. “Incentivos ao Mecenato social: objectivos – modalidades – eficácia”. [Incentives of sponsorship: objectives, models, effectiveness]. Pp. 87-106 in Barros, Carlos P. and Santos, José G. (Eds.). 1997. *As Instituições Não-Lucrativas e a Acção Social em Portugal*. [Nonprofit institutions and social action in Portugal]. Lisbon: Vulgata.

The author analyses the fiscal instruments used to encourage civil society donations to nonprofit organisations. Analysis of the application of these incentives reveals increasingly important roles of donations in financing nonprofit organisations. The author also analyses individual giving by income level and type of activity. He observes that higher income earners make more donations than lower income earners, but this may result from the higher marginal rate of taxation, which is higher for higher income groups. He calls for a revision of current instruments to increase their ‘social transparency’, coherence and autonomy.

## 6. Staff and volunteers

Ferreira, Cora, Raimundo, Manuela, and Camalhão, Rute. 1993. “Participação das Instituições Particulares de Solidariedade Social nas políticas sociais – do mito à realidade”. [Participation in nonprofit organisations in social politics – from myth to reality]. *Intervenção Social*, no. 8: 53-73.

This article analyses the roles attributed to and demanded by nonprofits in social services provision and social policy in general. Based on a survey of nonprofit organisations operating in Lisbon, the authors argue that despite common rhetoric, volunteers are not a common feature in this type of organisation. More than half of nonprofit organisations surveyed did not have any volunteers,

and moreover, these organisations expressed ambivalence about volunteers, seeing them both as a weakness and a potential strength to organisational structure.

## 7. Clients, users and consumer issues

Marchioni, Marco. 1991. “Mudança social novos problemas de hoje, participação e desenvolvimento”. [Social change – new problems today, participation and development]. *Intervenção Social*, no. 5/6: 37-42.

The author makes a case for the need to change the traditional approach to social services provision. He supports a participatory approach as opposed to the traditional assistance approach. In this there is a need to re-conceptualise the role of users from passive to active participants capable of dealing with their problems. There is also a need to shift from a reactive approach (aiming at consequences of social problems) to a preventative approach (aiming at causes of social problems).

Monteiro, Alcina, Rodrigues, Fernanda and Nunes, Maria H. 1991. “As práticas dos assistentes sociais num serviço de assistência pública”. [The practices of social workers in social services]. *Intervenção Social*, no. 5/6: 69-80.

The authors describe the transition from individual assistance to macro processes in social services provision. They analyse how social workers operate and the evolution of their approach. After the 1974 socialist revolution in Portugal there was a strong growth of social rights in Portuguese legislation. These rights were oriented toward individuals and families. After Portugal joined the EU, poverty was understood not only as the result of individual circumstances but also as a structural problem according to the development model adopted in the EU. The EU-financed programme ‘Fight against poverty’ encouraged actions that looked at poverty from a macro perspective.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Monteiro, Alcina. 1998. “Reforma da ‘Segurança Social’: um percurso de continuidades e discontinuidades”. [The reform of social security: a path of continuities and discontinuities]. *Intervenção Social*, no. 17/18: 263-286.

The author analyses perspectives on social security reform in Portugal through historical models of social security in Europe. She points toward a tendency for the “Americanised system”, i.e., privatisation, selection/individualisation, and work/moralisation through the implementation of the Guaranteed Basic Income model. She further argues that if these tendencies consolidate, hierarchical differentiation will occur across citizens and rights to social services.

## 9. Patterns of relations among providers

Ferreira, Cora, Raimundo, Manuela, and Camalhão, Rute. 1993. “Participação das Instituições Particulares de Solidariedade Social nas políticas sociais – do mito à realidade”. [Participation in nonprofit organisations in social politics – from myth to reality]. *Intervenção Social*, no. 8: 53-73.

This article analyses the roles attributed to and demanded by nonprofits in social services provision and social policy in general, drawing on a survey of nonprofit organisations operating in Lisbon. The authors argue that the concept of partnership is the underlying basis of the relation between nonprofit organisations and the state. However, this partnership does not involve much participation by nonprofit organisations in policy-making. Since these organisations normally operate in areas where resources are very scarce, it is difficult for them to be independent from the state. The result is often a loss of autonomy among nonprofit providers that ultimately adopt management models from state institutions.

Branco, Francisco. 1996. “Serviço social, inserção e rendimento mínimo”. [Social service, insertion and minimum income]. *Intervenção Social*, no. 15-16: 67-82.

This article argues that the Guaranteed Basic Income model contractualised relations between beneficiaries/citizens and society. It is also an instrument for raising user responsibility. The model rests on the idea of partnership involving state bodies, local government, nonprofit organisations, business and worker associations. Partnerships are formalised in local accompanying commissions. The model thus introduces the idea of social responsibility in response to social exclusion and offers social services to deal with it.

Bordalo, Filomena. 1991. “Da lógica de assistência à lógica da Acção Social”. [From the logic of assistance to the logic of social action]. Pp. 95-103 in *A Acção Social face aos novos imperativos sociais*, Lisbon: Direcção Geral da Acção Social.

The author examines the 20<sup>th</sup> century evolution of social services provision from the logic of assistance to the logic of social action. The latter emphasises research, data gathering and evaluation to inform objectives, strategies, and learning. She argues that social services today must rest on the ideas of partnership and user participation. Too often partnerships end up with all parties blaming each other for poor performance. Partnership, to be effective, must have a clear allocation of tasks and duties among the parties involved.

## 10. Innovation and change

Ferreira, Jorge. 1993. “A prática profissional do assistente social numa intervenção não directiva”. [Professional practice of the social worker in undirected intervention]. *Intervenção Social*, no. 8: 93-111.

The author describes the appearance of a new field for social service provision through technological change. He focuses on the case of SOS-Child, a telephone-based service responding to reports of child abuse. This service has different practice than traditional face-to-face service delivery. Advantages include maintaining anonymity and confidentiality, preventing intimidation by the institutional environment, and providing an easy form for reports to be received. On the other hand, technicians have no direct control over relations with the user. The staff implementing such service must be highly qualified because of the complex nature of the service and the need to work as facilitators.

Godinho, Maria M. 1991. “A informática e a Acção Social”. [Information technology and social action]. Pp. 171-177. In *A Acção Social face aos novos imperativos sociais*, Lisbon: Direcção Geral da Acção Social.

The author explores the relation between social services provision and the new technological advancements in computing. She argues that these developments present unprecedented opportunities for the systematisation of data that may lead to more efficient service provision. However, there are also dangers involved with the new information systems, namely that information security could be easily broken and sensitive information leaked. Moreover there should be great transparency about what information is kept and citizens should know what information is available and should be able to consult it if they wish.

## 11. European Union and globalisation issues

Hespanha, Pedro. 1996. “Novas perspectivas sobre os direitos sociais”. [New perspectives on social rights]. *Intervenção Social*, no. 15/16: 121-129.

In this article, the author analyses the new perspectives on social rights in Portugal. He argues that Portugal’s entry into the EU has led to an approximation between social policy in Portugal and other states in the EU. Consequently, the “breaking up” of the Portuguese welfare state began before it was ever consolidated, with graver consequences than elsewhere due to the vulnerability of certain sectors of Portuguese society (e.g., rural population, ethnic minorities, youth). The discourse of harmonisation and accumulated experience has legitimated political options that do not take into account the particularities of Portuguese society. The stalemate between the building of the welfare state and the progressive withdrawal of state commitment has led to the unplanned upsurge of private alternatives to the production of social goods and services.

## 12. Bureaucratisation and commercialisation problems

Azevedo, Mário. 1991. “O papel das Misericórdias na acção social”. [The role of the Misericórdias in social action]. In *A Acção Social face aos novos imperativos sociais*. [Social action and new social imperatives]. Lisbon: Direcção Geral da Acção Social.

The author examines the role of church organisations – Misericórdias – in service provision. He briefly describes the history of these organisations, which first appeared in the 15th century. These organisations were mainly dedicated to the provision of an array of health services. During the revolution hospitals were taken away from Misericórdias and became state property. The result was a bureaucratisation of the services leading to an increase in costs and a remarkable reduction in quality. Meanwhile the Misericórdias turned their attention to other social needs such as those of children, creating valuable social services in those areas. Today the state has recognised its poor management of hospital services and has initiated a programme to return the properties to the Misericórdias.

Hespanha, Pedro. 1996. “Novas perspectivas sobre os direitos sociais”. [New perspectives on social rights]. *Intervenção Social*, no. 15/16: 121-129.

In this article, the author argues that the progressive withdrawal of the state from the provision of social services led to the upsurge of nonprofit providers. These nonprofit actors co-operate with the state on the grounds of their autonomy and freedom to negotiate, but remain dependent on important financial transfers and technical support. Many nonprofit providers are thus converted into public sector contractors and lose many of their ideal properties. Their proximity to the state leads to their bureaucratisation and dependency while their proximity to users is lost and they fail to mobilise much civil society support.

## 13. Comparative and cross-national issues

Esping-Andersen, G. 1993. “Orçamentos e democracia: o estado-providência em Espanha e Portugal, 1960–1986”. [Budgets and democracy: the welfare state in Spain and Portugal]. *Análise Social*, 28 (122): 589-606.

In both Spain and Portugal democratisation – whether an initiative of the left or not – led to an important shift in social policy and social services provision. This was permanent and pronounced in Portugal while modest and temporary in Spain. The author argues that if we take into account all aspects of the change that occurred, we are forced to conclude that those who remained faithful to the anti-democratic thinking of the 19th century did not have much to fear from democratisation in terms of a radical redistribution. Even the revolutionary zeal of the leftist transition government in Portugal ultimately yielded to the will of the medium voter.

Sposatti, Aldaíza and Rodrigues, Fernanda. 1995. “Sociedade providência: uma estratégia de regulação social consentida”. [Welfare society: a strategy of consented social regulation]. *Revista Crítica de Ciências Sociais*, no. 42: 77-104.

This article analyses the issue of solidarity within social policy. More specifically it analyses solidarity in the context of the reciprocity networks established between those living in hardship. It synthesises a comparative study between Brazilian and Portuguese societies facing different crises of the role of the state and social service provision. Welfare society is analysed in its role of social reproduction as well as its relation with state service provision. Alongside its characteristic opposition to conformity, welfare society based on strong social cohesion is seen as a potential replacement of state obligations in both societies.

#### 14. Current trends and policy issues

Fernandes, Ernesto. 1996. “Intervenção e serviço social: A centralidade dos Direitos Humanos para a renovação do serviço social”. [Intervention and social service: the centrality of human rights for the renovation of social service]. *Intervenção Social*, no. 13/14: 19-34.

The author anchors social services provision and legitimacy to human rights, namely through human rights to social development. Social services provision traditionally associated with ideas of territoriality and citizenship should give way to provision of social services based on the notion of human rights. Human rights are more inclusive than the concept of citizenship. Human rights also belong to a more integrated set of principles that impact at the level of ‘human’ and ‘person’. The adoption of a human rights framework will bring about an important renovation of social services provision.

Rosa, Maria. 1993. “O desafio social do envelhecimento demográfico”. [The social challenge of the ageing population]. *Análise Social*, 28 (122): 679-689.

In the first part of this article the author describes the undeniable trend toward the ageing of Portuguese society. In the second part, the author analyses some of the impacts of the ageing process on society. Social spending must increase both in terms of fiscal transfers and social services provision due to the increase in number of beneficiaries. She concludes by suggesting we should perhaps change our understanding of the elderly from simple beneficiaries to potential workers in public benefit activities, reducing their dependence on the state as inactive citizens. This calls for a more fundamental recognition of the social value of individuals in the post-retirement years.

*Intervenção Social*. 1996. no. 15/16 Especial. “Novos desafios ao serviço social: rendimento mínimo e inserção”. [New challenges to social service: minimum income and inclusion – proceedings]. Lisbon: Instituto Superior de Serviço Social.

This journal edition presents proceedings from a conference held in Lisbon (November 3–4, 1997) on Guaranteed Basic Income. This conference attracted papers on the topic of basic income policy in the experience of France, Spain and Portugal.

## 15. Other topics

Wall, Karin. 1995. “Apontamentos sobre a família na política social portuguesa”. [Notes on the family in Portuguese social policy]. *Análise Social*, 30 (131-132): 431-458.

The author examines definitions and roles of the family in Portuguese legislation and social policy. Family and social rights were once defined in terms of legitimate family ties and dependence on the “head of the family”. Today the definition of family has changed, resting on gender equality. The author also concludes that the social protection level is low in general. The gaps in terms of formal service provision are filled by the family (understood as extended family with grandparents) and by informal solidarity networks. State support to this effort will depend to a large extent on the definition of family adopted.

Fernandez, Ernesto. “Serviço social e direitos humanos”. [Social service and human rights]. *Intervenção Social*. 1996. No. 13/14 Especial. Lisbon: Instituto Superior de Serviço Social.

This journal edition presents papers on the importance of human rights for understanding social services provision. The article by Ernesto Fernandez on the need to legitimise social services on a human rights basis is particularly important. Particularly useful is its bibliography on human rights in Portugal.

## C. Special Fields

### Child and Youth Welfare

Silva, M. H. Teixeira. 1986. “Algumas reflexões sobre educação pré-escolar”. [Some reflections on pre-school education]. *Intervenção Social*, no. 4: 67-84.

The author reflects on the roles of the family and institutions in providing social services. Taking the case of pre-school care, she describes the need for both complementarity and a common tension between the two spheres of service delivery. Institutional responsibility overshadows family responsibility because not only do children spend more time at institutions but as well, institutions alter the practices, values and life style of the family. As a result families have an ambivalent attitude toward this type of social service. On one hand, it removes a burden from their shoulders by shiting the responsibility of caring. On the other hand, it takes away much of the family’s power to educate children.

Almeida, Ana Nunes. 1998. "Novos modelos de ser e de estar na sociedade de hoje: os contextos da infância". [New models of being in society today: childhood]. *Intervenção Social*, no. 17/18: 11-18.

The author examines demographic changes and their impact on social services provision to children. She claims that the birth rate is declining in Portugal and today it equals 1.2 children per couple. As a result the composition of both the immediate and extended family has changed dramatically. At the same time representations of childhood are losing their value as insurance for the labour force or the elderly. Children are not an investment but a cost. She also examines the importance of family networks for the social protection of children. Social service provision needs to continuously re-examine its attitudes toward and changing role in a changing social reality.

Vieira, Regina F. 1997. "Centro de acolhimento – intervenção para a afirmação do direito de cidadania da criança e da família". [Shelter – intervention through affirmation of citizenship rights of children and the family]. *Intervenção Social*, no. 15/16: 69-84.

The author describes a nonprofit shelter for molested children: Centro de Acolhimento Casa do Infantado. This centre temporarily houses abused children and ensures their security. It is a state run centre that performs a wide range of services from housing to finding permanent homes for children. The author argues that this type of centre is an important state response that ensures the citizenship rights of children subjected to violence.

## **Frail elderly, nursing homes, long-term care**

Rio, Anabela Sousa. 1997. A Santa Casa de Misericórdia de Lisboa no 'apoio a idosos': uma unidade estratégica de actuação". [The Misericórdia of Lisbon in the support of the elderly: a strategic unit of actuation]. Pp. 159-190 in Barros, Carlos P. and Santos, José G. (Eds.). 1997. *As Instituições Não-Lucrativas e a Acção Social em Portugal*. [Nonprofit institutions and social action in Portugal]. Lisbon: Vulgata.

The author describes and analyses care of the elderly as a strategic unit in one of the most important church organisations for social service provision: Santa Casa da Misericórdia in Lisbon. She starts her analysis by reviewing some of the current trends in social ageing. She then describes the origin and establishment of the different areas of care for the elderly: home support, elderly home, day centres and leisure centres. She also comments on current legislation in the field.

## Disabled

Silva, Luisa Ferreira. 1991. "Planeamento social de nível comunitário como prevenção primária de saúde mental". [Social planning at the community level as primary prevention of mental illness]. *Intervenção Social*, no. 5/6: 81-86.

The author describes a project aimed at the prevention of mental illness in an urban community in Oporto. She argues that the integrated approach of the project, which tackles many service fronts simultaneously, proved very successful and should be more common. However, state service provision tends to be punctual rather systematic. In this case integration was possible due to a high level of personal commitment on the part of the staff involved.

Couto, Beatriz. 1995. "A questão da inserção profissional dos insuficientes renais crónicos e a estratégia terapêutica". [The professional insertion of chronically insufficient kidney patients and the strategy of therapy]. *Intervenção Social*, no. 11/12: 159-180.

The author researched the relationship between chronically insufficient kidney patients and access to the job market. She found a high level of unemployment among patients. These patients do not receive adequate support and are left to arrange their own employment. Their treatment follows a very rigid schedule which contributes to the difficulty of coinciding with employment schedules.

Queiroz, Maria J. and Henriquez, B. Alfredo. 1994. "O trabalho social . . . da organização para o movimento – o caso da experiência CERCIC". [Social work . . . from organisation to movement – the case of CERCIC]. *Intervenção Social*, no. 10: 25-38.

The authors describe the emergence and impact of the CERCIC movement. The CERCIC movement was a very important collective action that emerged shortly after the socialist revolution in 1974, and was dedicated to the education and rehabilitation of disabled children. The socialist revolution created a social rupture and class struggle for rights to social services previously unattended. The movement was very successful in demanding the creation of services for disabled children that are still in place today.

## Homeless, the poor, poverty

Rodrigues, Fernanda. 1986. "Um perfil de pobreza: contributos para a estratégia de actuação". [A profile of the poor: contributors for a strategy of actuation]. *A Intervenção Social*, no. 4: 59-66.

The author describes a study profiling poverty in Oporto. She argues that this type of study is a fundamental step toward adequate service provision. State bodies

with a territorial basis have a wealth of information that should be systematised. On the basis of this experience she advocates that local centres be created to be responsible for studies, integrating service provision and creating adequate solutions to local problems. These centres would be a necessary step toward the integration of social service provision.

## Unemployed

Queiroz, Maria C. and Gros, Marielle C. 1997. “Das condições sociais da exclusão às condições da solidariedade”. [From the social conditions of exclusion to the conditions of solidarity]. *Cadernos de Ciências Sociais*, no. 15/16: 5-40.

The authors examine the causes of social exclusion and examine services for the unemployed. They argue that training has been the main service provided, comprising only a technical fix to a much deeper and more complex problem. To generate better results a profound change in the behaviour of economic agents is needed, and a sharing of responsibility between political and economic actors. At present the idea of partnership is mainly rhetorical; it needs to become a reality in relations between the state and other economic agents.

Sousa, Raul. 1992. “Evolução dos serviços públicos de emprego”. [The evolution of employment services]. *Análise Social*, 27 (115): 207-214.

In this article the author provides an historical analysis of social services related to unemployment. Before World War II, concerns were expressed in terms of matching supply and demand of employment. From World War II to the first oil shock in the 1970s, concern shifted toward an emphasis on training. From the first oil shock to present, private providers entered the service provision scene. Public intervention emphasises financial incentives for employment creation, contracting-out services and unemployment benefits. The author concludes by calling for a return to more ‘hands-on’ intervention by the state, competing with rather than financing private providers.

Albino, José C. 1991. “Projecto de combate ao desemprego” [A project to combat unemployment]. in *A Acção Social face aos novos imperativos sociais*. [Social action and new social imperatives]. Lisbon: Direcção Geral da Acção Social.

In this article the author describes a project to reduce unemployment in a rural community in Portugal. He concludes that training for the unemployed should be undertaken by organisations closely involved in the social milieu.

## Immigrants and refugees

Antunes, Adelino. 1998. "Multiculturalidade e educação para a cidadania: o começo de uma história ou há ciganos em Alcobaça". [Multiculturalism and education for citizens: the beginning of a history of the Roma in Alcobaça]. *Intervenção Social*, no. 15/16: 85-110.

The author describes project Fénix (Phoenix) which provides social services to ethnic minorities, namely Roma. The project involved three different types of social services: (1) a bus that visits communities raising awareness through education for citizenship, (2) housing services, and (3) training for the unemployed. The author argues that Roma have fears of inclusion, which prevent them from accessing social services to which they are entitled. To deal with this problem the project based itself on educating ethnic minorities about citizenship and raising social responsibility while being flexible enough to deal with different cultures.

### D. Summary assessment of current debates in the field

Despite the small number of academic publications on social services in Portugal, several debates have emerged. The first relates to the role of private providers, both formal and informal (e.g. Sousa Santos, 1994; Barros and Santos, 1997; Nunes, 1995). What are the roles of state and private bodies in the design, financing, and provision of services? What should be the future of family or informal service provision? Should it be encouraged or replaced by formal provision? The second debate centres on the crisis of the welfare state (Carreira, 1996; Mendes, 1995) and what should be done about it. The issue of the ageing population has had much attention within this debate (e.g. Rosa, 1993). A third debate relates to the impact of basic income policy on social services delivery (e.g. Branco, 1997). Should basic income be combined with social services to combat exclusion? How should this combination be arranged? Does basic income reduce exclusion? A fourth current debate concerns the grounds for defining beneficiaries, i.e. human rights versus citizenship status as the basis for social rights and services (e.g. Fernandes, 1998). The fifth debate relates to the impact of EU membership and the need to harmonise EU member states, versus the need to respect special Portuguese characteristics (e.g., Hespanha, 1997; Rodrigues, 1999).

As evident in the recent publication of most work relating to social services, academic interest in the area is quite new and currently growing. There are still large gaps in this literature, for instance almost complete silence about efficiency and equity of social service provision. This may be due to the youth of the welfare state in Portugal and democratic debates about it. As well, research that evaluates social services provision in general is badly lacking, as is empirical analysis

of specific social services, with the exception perhaps in the areas of children and youth services.

## Acknowledgements

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## References not annotated

*Barroco, Maria de Fátima. 1997. "As Instituições Particulares de Solidariedade Social: seu enquadramento e regime jurídico". [Nonprofit organisations: their legal framework]. Pp 59-74 in Barros, Carlos P. and Santos, José G. (Eds.). 1997. As Instituições Não-Lucrativas e a Acção Social em Portugal. [Nonprofit organisations and social action in Portugal]. Lisbon: Vulgata.*

*Segurança Social. 1999b. Anuário Estatístico da Segurança Social 1997. [Annual statistics on social security]. Lisboa: Instituto de Gestão Financeira da Segurança Social.*

## Spain

by *Julia Montserrat*

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### A. Synopsis of social service system

Institutionally the Spanish social services system is mixed and decentralised. There are two production spheres, public and private, each responsible for about 50% of social service provision. The private sector is divided into three levels: organisations supervised by the state (Red Cross and ONCE, an organisation for blind people); non profit organisations (religious and civil associations); and private enterprises. Nonprofit organisations provide 23% of services while for-profit organisations, whose role is growing, currently provide 24% of services.

Under the Spanish Constitution (1481) and the Municipalities (Local Law 7/1985), authority over social services is held by the seventeen Autonomous Regions in Spain. There is no national law of social services, rather social services are regulated under regional laws. However, the global system of social services is co-ordinated nationally through: (a) the National Conference on Social Services, where Central and Regional Governments decide on national programmes financed mainly by Central Administration; and (b) The National Plan of Local Social Services (since 1988) which develops a national net of local social services.

Technical organisation of the social services system is also decentralised. In collaboration with Regional Administrations, Central Administration and Social Security finance national plans such as the Gerontological National Plan, the Plan on Drugs, the Equality Plan and the National Plan of Local Social Services. The Regions or Autonomous Governments finance and develop a regional net of social services, assistance pensions and regional minimum income programmes (since 1989 in Basque Country). Municipalities with more than 20,000 inhabitants are legally obliged to develop a social services department, while Counties Governments must develop social services in municipalities of rural areas.

Social services are financed through the public sector with general taxes, the 0.52% Income Tax, and user fees. Public spending on social services now amounts to about 1% of the GDP, and according to Survey of Active Population in 1998 the social services sector employed 122,000 people, or about 1% of all employment in Spain. About 4.4% of all households, or around half million families, now use social services. Social services are not a social right such as social rights to health or to pensions, but a discretionary social right dependent on a means test.

However, new regional laws on social services favour extending or universalising social services, which are limited by the annual economic budget.

## B. Annotated Bibliography

### 1. Comprehensive works, overview volumes, classics on social services and the welfare system

Casado Pérez, D. 1994. *Introducción a los servicios sociales*. [Introduction to social services]. Madrid: Popular.

This is a classic book on personal social services: their historical development, functional structure, and social groups targeted by state and private sector.

Alonso Seco, J. and Gonzalo González. B. 1997. *La asistencia social y los servicios sociales en España*. [Social assistance and social services in Spain]. Madrid: Boletín Oficial del Estado.

This book analyses Spanish legislation on social services at the level of social security, central administration and regional administrations. The regional laws on social services are considered closely, as the regions have full responsibility for social services.

Alemán, C. and Garcés, J., ed. 1996. *Administración social: servicios del bienestar social*. [Social administration: social welfare services]. Madrid: Siglo XXI de España Editores.

This is a textbook on social services in some Social Services University Schools. It discusses the structure, functions and impact of social services and its links with other general welfare services.

Casado Pérez, D. 1998. *Políticas de servicios sociales*. [The politics of social services]. Buenos Aires: Lumen.

Casado examines the main areas of social intervention by social services. There are many references to the role of the voluntary sector and new developments in the social services – decentralisation and privatisation. The target groups considered are mainly excluded groups.

Casilda, R. and Tortosa, J.M. 1996. *Pros y contras del estado de bienestar*. [The pros and cons of the welfare state]. Madrid: Tecnos.

With the collaboration of many authors this book analyses the ideological and political problems of the future welfare state. It also considers the role of the market and civil society. Specific social problems such as distribution of income, poverty and ageing the are subject of close analysis.

## 2. Supply and demand

Alonso Seco, J. and Gonzalo González, B. 1997. *La asistencia social y los servicios sociales en España*. [Social assistance and social services in Spain]. Madrid: Ed. Boletín Oficial del Estado. See description above.

Alemán, C. and Garcés, J., ed. 1996. *Administración social: servicios del bienestar social*. [Social administration: social welfare services]. Madrid: Siglo XXI de España Editores. See description above.

Ministerio de Trabajo y Asuntos Sociales. 1997. *El sistema público de servicios sociales. Memoria del plan concertado de prestaciones básicas de servicios sociales en corporaciones locales 1996-1997*. [The public system of social services: co-operation with local corporations in basic social services provision. 1996-97]. Madrid: Ministerio de Trabajo y Asuntos Sociales.

This monograph evaluates the development of a municipal network of community services financed by the state, regions and municipalities. The extension of home help and day centres, services for children and women are analysed in detail. Finally an analysis of how social services contribute to job creation in services sector is presented.

## 3. Definition, forms and types of social services

Alemán, C. and Garcés, J., ed. 1998. *Política social*. [Social policy]. Madrid: McGraw-Hill.

This is a textbook written by several authors who analyse different welfare areas such as education, health, social services, housing and social benefits. They also examine policies by target group, such as the elderly, women and the socially excluded, and consider new debates on the welfare state and the role of civil society.

Alonso Seco, J. and Gonzalo González, B. 1997. *La asistencia social y los servicios sociales en España*. Madrid: Ed. Boletín Oficial del Estado. [Social assistance and social services in Spain]. See description above.

Casado Pérez, D. 1994. *Acción social y servicios sociales*. [Social action and social services]. Madrid: FOESSA.

This long chapter is one of the most all-inclusive works about social services. It analyses the scientific and political debate, the legal and technical organisation of the social services system, target groups, the production of social services in the Autonomous Regions, and the role of families and volunteers in the care and social assistance of the population.

#### 4. Organisational aspects, forms, ownership and auspices of provider

Alonso Seco, J. and Gonzalo González, B. 1997. *La asistencia social y los servicios sociales en España*. [Social assistance and social services in Spain]. Madrid: Ed. Boletín Oficial del Estado. See description above.

Ministerio de Trabajo y Asuntos Sociales. 1997. "El sistema público de servicios sociales. Memoria del plan concertado de prestaciones básicas de servicios sociales en corporaciones locales 1996–1997". [The public system of social services: co-operation with local corporations in basic social services provision. 1996–97]. Madrid: Ministerio de Trabajo y Asuntos Sociales. See description above.

Alemán, C. and Garcés, J., ed. 1996. *Administración social: servicios del bienestar social*. [Social administration: welfare services]. Madrid: Siglo XXI de España Editores. See description above.

Casado Pérez, D. 1998. *Políticas de servicios sociales*. [Social services policies]. Buenos Aires: Ed. Lumen. See description above.

#### 5. Financing

Barea Tejeiro, J. 1997. *El gasto público en servicios sociales en España*. [Public spending on social services in Spain]. Madrid: Ministerio de Trabajo y Asuntos Sociales.

Barea Tejeiro analyses public spending on social services from 1970 to 1990 referring to public administrations. The author also considers the expenditure of the three most important NGOs: Red Cross, Caritas and ONCE. Spending is analysed at economic and functional levels, showing distribution by target groups.

Rodríguez Cabrero, G. 1990. *El gasto público en servicios sociales en España*. [Public spending on social services in Spain]. Madrid: Ministerio de Asuntos Sociales.

This book offers a quantitative approach to the public spending on social services in different levels of administration, from 1972 to 1988. It also addresses the size of the most relevant social initiatives in social services fields.

Alonso Seco, J. and Gonzalo González, B. 1997. *La asistencia social y los servicios sociales en España*. [Social assistance and social services in Spain]. Madrid: Ed. Boletín Oficial del Estado. See description above.

Alemán, C. and Garcés, J., ed. 1996. *Administración social: servicios del bienestar social*. [Social administration: social welfare services]. Madrid: Siglo XXI de España Editores. See description above.

## 6. Staff and volunteers

Rodríguez Cabrero, G. 1996. "Los servicios sociales en España: implantación, generación de empleo y evaluación de su efectividad". [Social services in Spain: establishment, generation of employment and evaluation of its effectiveness]. In AAVV (ed). *Políticas redistributivas*. [Redistributive policies]. Madrid: Fundación Argentaria. Visor.

This chapter analyses the volume and structure of the social services staff, its territorial distribution and its composition by demographic characteristics. Public spending on social services is also considered at Central and Local Levels. Finally it examines how the poor can access social services.

Casado Pérez, D. 1999. *Imagen y realidad de la acción voluntaria*. [Images and reality of voluntary work]. Barcelona: Hacer.

This book examines the role of voluntary organisations in Spain by describing their aims, organisation and relationship with the state and market. It also provides statistic on volunteer organisations in different fields.

Rodríguez Cabrero, G. and Montserrat, J., ed. 1996. *Las entidades voluntarias en España. Institucionalización, estructura económica y desarrollo asociativo*. [Voluntary organisations in Spain: institutionalisation, economic structure and associative development]. Madrid: Ministerio de Asuntos Sociales.

The aim of this book is to offer a wide outlook on voluntary organisations in Spain. Issues such as the historical evolution and the original structure of the association movement are addressed alongside the economic dimension of voluntary organisations in social services.

## 7. Clients, users, and consumer issues, profiles

Alonso Seco, J. and Gonzalo González, B. 1997. *La asistencia social y los servicios sociales en España*. [Social assistance and social services in Spain]. Madrid: Ed. Boletín Oficial del Estado. See description above.

Alemán, C. and Garcés, J., ed. 1996. *Administración social: servicios del bienestar social*. [Social administration: social welfare services]. Madrid: Siglo XXI de España Editores. See description above.

Casado Pérez, D. 1998. *Políticas de servicios sociales*. [The policies of social services]. Buenos Aires. Lumen. See description above.

## 8. Efficiency, effectiveness and equity of social service provision and financing

Muñoz, S. and AAVV, ed. 1997. *Las estructuras del bienestar. Derecho, economía y sociedad en España*. [Structures of welfare: law, economy and society in Spain]. Madrid: Escuela libre. Editorial Civitas.

This is a diverse group of papers on welfare from political, economic and institutional points of view. Public policies on welfare are evaluated in light of the problems of efficiency and equity.

Fundación FOESSA. 1998. *Las condiciones de vida de la población pobre en España*. [Living conditions of the poor population in Spain]. Madrid: Informe FOESSA.

This report analyses the social and economic processes of poverty and the impact of social and economic policies against poverty between 1980 and 1995.

## 9. Patterns of relations among providers

Rodríguez Cabrero, G., ed. 1994. "Estado, privatización y bienestar". [The State, privatisation and welfare]. In AAVV (ed.) *La política social en España: 1980–1992*. Madrid: Informe FOESSA.

This is a pioneer book resulting from an international seminar addresses the privatisation debate and welfare state in Spain. It analyses the new relations between the state, market and civil society and their consequences for social welfare.

Casado, D. 1995. *Organizaciones voluntarias en España*. [Voluntary organisations in Spain]. Barcelona: Hacer.

This book offers a general overview of the voluntary organisation sector in Spain. It includes chapters that deal with patterns of relations among providers and public-private partnership.

## 10. Innovation and change

Casilda, R. and Tortosa, J.M. 1996. *Pros y contras del estado de bienestar*. [The pros and cons of the welfare state]. Madrid: Tecnos. See description above.

Casado Pérez, D. 1998. *Políticas de servicios sociales*. [The policies of social services]. Buenos Aires: Lumen. See description above.

Alemán, C. and Garcés, J., ed. 1996. *Administración social: servicios del bienestar social*. [Social administration: social welfare services]. Madrid: Siglo XXI de España Editores. See description above.

## 11. European Union and globalisation issues

Lafontaine, O. and Muller, C. 1998. No hay que tener miedo a la globalización. Bienestar y trabajo para todos. [Do not fear globalisation: welfare and work for all]. Madrid: Biblioteca nueva.

This book discusses how increasing globalisation offers opportunities for welfare states in all parts of the world. It argues that issues such as unemployment and underdevelopment are not the result of globalisation, therefore each country must implement its own policy measures to cope with these problems.

## 12. Bureaucratisation and/or commercialisation problems

Monereo, J. L., 1996. Derechos sociales de la ciudadanía y ordenamiento laboral. [Social rights of citizenship and labour market policy]. Madrid: Consejo Económico y Social.

Social policy must be seen as a multi-disciplinary discipline in which topics such as the changing of role of the family and the new trend of labour access among young people are must be addressed, in order to increase the overall efficiency of social policies.

## 13. Comparative, cross-national issues

INSERSO. 1990. *Estudio comparado del gasto en servicios sociales en los países de la CEE*. [Comparative study of the cost of social services in the countries of the EEC]. Madrid.

This book compares social services expenditure in different EU countries in the 1990s. It first analyses the global expenses of welfare politics in EU countries. Secondly it analyses social services expenditure in Spain and its relationship with other EU countries.

Sarasa, S. and Moreno, L. 1995. *El estado del bienestar en la Europa del Sur*. [The welfare state in Southern Europe]. Madrid: Consejo Superior de Investigaciones Científicas.

This is a central and highly quoted book on the development of welfare state in Southern Europe. Experts on Italy, Spain and Portugal analyse social services, poverty, NGOs, and welfare policies for target groups.

## 14. Current trends and policy issues; predictions

Casado Pérez, D. 1998. *Políticas de servicios sociales*. [Social services policies]. Buenos Aires: Lumen. See description above.

Casilda, R. and Tortosa, J. M. 1996. *Pros y contras del estado de bienestar*. [The pros and cons of the welfare state]. Madrid: Tecnos. See description above.

Gomà, R. and Subirats, J. 1998. *Políticas públicas en España*. [Public politics in Spain]. Barcelona: Ariel. Ciencia Política.

In this text about public policies in Spain, a group of well known specialists in political science, sociology and economics analyse the evolution, contents, actors, distribution and management schemes of a wide range of policies.

## C. Special Fields

### Child and youth welfare

Ministerio de Trabajo y Asuntos Sociales. 1994. *Los servicios de atención a la primera infancia*. [Services for young children]. Madrid: MTAS.

Community services for children in Spain are described critically in this publication. The primary focus is services for children in under six years old who come from problem families, and for children subjected to physical and psychological abuse.

Ministerio de Trabajo y Asuntos Sociales. 1994. *Investigación y políticas de infancia en Europa en los años 90*. [Investigation and policies for children in Europe in the 1990s]. Madrid: MTAS.

This comparative research of social services for children in different European countries analyses relevant social policies, in particular policies those for abused children and single mothers.

Ministerio de Trabajo y Asuntos Sociales. 1996. *El maltrato y protección a la infancia en España*. [The abuse and protection of children in Spain]. Madrid: MTAS.

In the past decade, debate about child abuse and analysis of it has emerged in Spain. Its nature, extent and social impact are analysed in this publication. Various proposals are made, mainly by the Ombudsman Office and NGOs for children, concerning how to protect abused children.

## Family services

Alberdi, I. 1995. *Informe sobre la situación de la familia en España*. [The situation of the family in Spain]. Madrid: Ministerio de Trabajo y Asuntos Sociales. Alberdi co-ordinates a very comprehensive book on Spanish families: their changing size and function, the declining fertility rate, the new roles of working women, the growing divorce rate and the transition from the nuclear family model to a plurality of family types.

Iglesias de Ussel, J. 1994. "La familia". [The family]. In *V Informe FOESSA*. Madrid: FOESSA.

This article presents detailed research on the nature, structure and functions of Spanish families. Iglesias co-ordinates many issues on the family and analyses within the main social changes during the last decade, such as the new role of women and children in modern families. The author also considers currently developing social policies to protect children and support family caregivers.

Flaquer, L. 1991. "¿Hogares sin familia o familias sin hogar? Un análisis sociológico de las familias de hecho en España". [Homes without family or families without homes? A sociological analysis of *de facto* families in Spain]. In *Papers, Revista de Sociología* (36).

The new household models emerging in Spain are similar to those in other Western countries. This paper shows that the growth of households without families is taking place in large towns. These trends challenge traditional demographic structures of Spain.

## Frail, elderly, nursing homes, long-term care

Rodríguez Cabrero, G., ed. 1999. *La protección social de la dependencia en España*. [Social protection and dependency in Spain]. Madrid: Ministerior de Trabajo y Asuntos Sociales.

This book analyses the social structure of dependent people in Spain and the present system of social protection by health and social services systems. It also draws on an international comparative study of EU countries conducted by Jozef Pacolet. The author proposes that the protection of elderly dependent people and the cost of services for the elderly should follow the German model of social protection of dependency.

Rodríguez Rodríguez, P. 1999. "Análisis de los servicios sociales en el marco de la atención sociosanitaria". [Analysis of social services and the framework of social-health care]. Chap. 2 In *Atención sociosanitaria en España: perspectiva gerontológica y otros aspectos conexos*. [Social-health care in Spain: gerontological per-

spectives and other connected aspects]. Madrid: Oficina del Defensor del Pueblo. This substantial chapter analyses in detail the resources available to dependent people: home help, nursing homes, day centres, temporary residences and services related to the support of informal care givers. It proposes that services need to be expanded, mainly home help and services for family care givers.

COLECTIVO IOE. 1995. *Cuidados en la vejez. El apoyo informal*. [Care in old age. Informal support]. Madrid: Ministerio de Trabajo y Asuntos Sociales. This qualitative research is based on discussion groups and interviews with care givers. It analyses the role of the family in care, the changing role of the family due to women's growing labour market participation, and the declining of birth rate in Spain. It emphasises the crucial role of the family in care of the elderly, and the need to improve the role of state and NGOs in protection and care of this growing social group.

## Health care related social services, convalescence and rehabilitation

Fontanals De Nadal, M.D., Martínez Mateo, F. and Vallés y Forcada, E. 1995. "La evaluación de la atención sociosanitaria en Cataluña. La experiencia del programa Vida als Anys". [Evaluation of social-health care in Catalonia]. *Revista Española de Geriátría y Gerontología* (30).

This paper analyses the first regional programme to address the needs of people with dependency problems. The Catalan model integrates and co-ordinates the health system and social services. The paper analyses many problems in this programme, including financial difficulties and the low participation of social services.

Zunzunegui, M.V. 1997. *Envejecimiento y Salud*. [Ageing and health]. Madrid: SESPAS.

Here Zunzunegui analyses the elderly population's growing impact on health resources, the cost of hospital care and pharmaceutical spending. The author also considers the use of personal and family resources in order to better manage public and private resources and better protect the elderly.

Bazo, M.T. 1996. "Los cuidados familiares de salud en las personas ancianas y las políticas sociales". [Family health care and the elderly in social policies]. *Revista Española de Investigaciones Sociológicas* (73).

This paper examines the role of the family as primary care giver for the elderly. The author focuses particularly on women's roles as housewives and employed women. The problems care givers face, such as stress, declining social relations and isolation, are analysed in detail. New social policies are proposed to support the role of the family in a time when the size and functions of Spanish families are in transition.

## Disabled

ONCE. 1993. *La integración social de los minusválidos*. [The social integration of the disabled]. Madrid: Fundación ONCE.

In this book different authors examine the problems of social integration which disabled people face. It evaluates LISMI, the National Law (1982) for social integration of disabled people. It finds social and economic benefits to this law in having reduced poverty in the target group. However, social integration still requires the development of active policies in the future.

COLECTIVO IOE/CIMOP. 1998. *Discapacidad y trabajo en España*. [Disability and work in Spain]. Madrid: MTAS.

This qualitative research analyses the attitudes of disabled people in order find ways of improving their labour market integration. The limits of protected jobs for this group makes more ambitious policy necessary. However, job creation is determined by the economic limits of the labour market and by the ideological barriers present in society.

ONCE. 1998. *Situación del empleo de las personas con discapacidad en España. Propuestas para su reactivación*. [The employment situation of the disabled in Spain: suggestions for integration]. Madrid: Fundación ONCE.

In this study NGOs for the disabled propose new policies to improve the labour integration of disabled people. Some proposals made to the Central Authorities have become policies promoting the social and labour integration of this group. These policies suggest increased public spending to compensate private enterprises for job creation.

## Homeless, the poor, poverty

Fundación FOESSA. 1998. *Las condiciones de vida de la población pobre en España*. [Living conditions of the poor population in Spain]. Madrid: FOESSA.

This study presents the main research on poverty in Spain. It draws on a sample of 29,592 people living in poverty to analyse the spatial distribution of poverty; the economy and housing of poor people; and a multidimensional poverty typology. It analyses the social and economic processes of poverty and the impact of policies against poverty from 1980 to 1995.

García Lizana, A. 1996. *La pobreza en España*. [The poor in Spain]. Madrid: Encuentro.

Professor Lizana analyses the relation between economic development and poverty through joint social and economic indicators. He also considers the impact of economic policies on poverty in Spain during the eighties.

Aguilar, M., Gaviria, M. and Laparra, M. 1995. *La caña y el pez. Estudio sobre los salarios sociales en las Comunidades Autónomas*. [The fishing rod and the fish: a study of social benefits in the autonomous regions]. Madrid: FOESSA.

The authors analyse the regional minimum income systems: social benefits and social services from 1989, when the first regional system was established in Basque Country, to 1995. They examine the capacity of regional income systems to promote social integration, mainly labour market participation.

## Unemployed

Toharia, L. 1994. *Empleo y paro*. [Employment and unemployment]. In Informe Foessa, Chapter 8. Madrid: FOESSA.

This accurate chapter closely analyses the evolution of employment and unemployment in Spain. The author examines the labour market participation of women and young people, the irregular labour market, the long-term unemployed and the social protection of unemployed people.

Garrido Medina, L. 1997. *Diagnóstico sobre el paro juvenil y políticas para facilitar la entrada al primer trabajo*. [Youth unemployment and policies to facilitate employment]. Ginebra: OIT, Colección Estudios de Políticas.

With the support of the Labour Working Survey the author analyses the incidence of youth unemployment in Spain, policies of employment and their limited effect on young people and their social integration, and temporary jobs.

Garrido Medina, L. and Toharia, L. 1996. "Paro y desigualdad". [Unemployment and inequality]. In *Pobreza, necesidad y discriminación*. [Poverty, necessity and discrimination]. Madrid: Argenteria/Visor.

This paper analyses the relation between poverty and long-term unemployment considering its impact on the family. It considers the regional distribution of unemployment, its impact at a personal level, and the limited role of social benefits in the fight against poverty.

## Immigrants and refugees

Martínez Veiga, U. 1997. *La integración social de los inmigrantes extranjeros en España*. [The social integration of immigrants in Spain]. Madrid: Trotta/Fundación 1<sup>o</sup> mayo.

This book analyses the social integration of four economic immigrant groups in Spain: Moroccans, Dominicans, Gambians and Cape Verde Islanders. It explores their migratory networks, working conditions, and the impact of immigration policies.

Carrasco Carpio, C. 1999. *Mercados de trabajo: los inmigrantes económicos*. [Labour markets: economic immigrants]. Madrid: Ministerio de Trabajo y Asuntos Sociales.

This book presents valuable research that was prized by the Ministry of Work. Based on a national survey of immigrants in 1998, the work analyses immigrants' social and economic integration. It considers immigrant participation in the black market, and their housing and working conditions generally. The research shows that immigrants do not compete for jobs with the Spanish working population.

Díez Nicolás, J. 1998. *Actitudes hacia los inmigrantes*. [Attitudes toward immigrants]. Madrid: Ministerio de Trabajo y Asuntos Sociales

In this research a national survey to the Spanish population is analysed to examine attitudes toward immigration, personal relationships with immigrants, the territorial differences in public opinions, racism and attitudes toward immigrants from different countries.

#### **D. Summary assessment of current debates in the field**

Today the academic and political debate on social services in Spain centres on four main issues. First, the necessity of establishing a subjective right to social services, particularly referring to the social protection of elderly dependent people. Second, the harmonisation of regional social services laws in order to improve territorial equality of social benefits and social services. Third, the displacement of NGOs' role in the production of social services by for-profit organisations, mainly in services such as home help, nursing homes and other residential services. Fourth, the social protection of elderly dependent people is under debate at scientific and political levels. Regional programmes are being established and political parties are supporting them. These debates refer to the universalisation of rights to social services, co-ordination of administrations (central and regional), integration of the mixed system of welfare production, and social protection of dependency.

## Sweden

by Tommy Lundström

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### A. Synopsis of the social service system

A key characteristic of the Swedish social services system is its high level of decentralisation. Social service provision is a municipal responsibility regulated primarily through the 1980 Social Services Act (*Socialtjänstlagen*). The legal framework provided in this Act gives local government considerable freedom to organise social services which thus vary across municipalities, for example regarding organisational features, resource allocation and policy questions. Compared to Anglo-Saxon traditions, local politicians can exert considerable influence on social services even in individual social service casework, particularly those involving coercive measures or rehabilitation programs with high costs. Social services are generally financed through taxation.

The sector of social services generally referred to as “social work” comprises individual and family services, including social assistance (generally means-tested economic aid), treatment of substance abusers, child welfare and support such as family counselling. According to law, such social services must consist of preventive activities and individually tailored case management and treatment programs for families and individuals.

Other social services provided at the municipal level are child protection and care for the disabled and the elderly. Child protection involves investigations and intervention in cases of child abuse and neglect. Services for the disabled, whose rights are upheld in the 1994 Act Concerning Support and Services for Persons with Certain Functional Impairments, include the provision of meaningful activities and housing adapted to specific disabilities. The majority of tasks under the 1994 Act are carried out by municipalities, but some are undertaken by county councils. Care of the elderly is much debated; with the ageing population the quality of services is questioned and increasing pressure is placed on the economy. Services aim to enable older people to live independently under secure conditions, for example through home help and adult care centres. The municipalities also provide various forms of accommodation, including homes for the elderly (*ålderdomshem*) and group homes. In recent years alternatives to municipal care have been established mainly by private for-profit companies, but funding remains primarily public.

## B. Annotated biography

SOU 2000:3 *Välfärd vid vägskäl*. [Also available as summary in English: Welfare at crossroads: summary of interim balance sheet for welfare in the 1990s].

In this report commissioned by the Ministry of Health and Social Affairs, researchers analyse the development of social welfare in the 1990s. They consider income resources, housing and illness. The report presents the most thorough and up to date picture of the Swedish social welfare system, its development in the 1990s and its implications for the Swedish population.

Socialstyrelsen. 2000. *Socialtjänsten i Sverige, 1999*. [Social services in Sweden]. Stockholm: Socialstyrelsen.

In this report the National Board of Health and Welfare presents the social services system and describes the various social service fields. It presents statistics on the different social service activities and discusses the future of social services.

Olsson, S.E. (1990). *Social Policy and Welfare State in Sweden*. Lund: Arkiv.

This often quoted book on the building of the Swedish welfare state in the 20th century presents the historical background of the welfare state and social services and also provides an international perspective.

Bergmark, Åke. 1997. "From reforms to rationing? Current allocative trends in social services?" *Scandinavian journal of social welfare*, 6: 74-81.

Bergmark analyses resource allocation within social services in the 1990s against the background of economic recession and growing unemployment. Statistics on the development in social services during the recession are also presented in relation to other sectors.

Sunesson, S., Blomberg, S., Edebalk, P.G., Magnusson, J., Meeuwisse, A., Petterson J., Salonen T. 1998. "The Flight from Universalism". *European Journal of Social Work*, 1: 19-29.

This article offers a critical overview of the development of the Swedish welfare state, with focus on social services.

## C. Special fields

### Child and youth welfare

Andersson, G., Aronsson, K., Hessle, S., Hollander, A. & Lundström, T. 1996. *Barnet i den sociala barnvården*. [Children and child care services]. Stockholm: Centrum för utvärdering av socialt arbete/Liber

This comprehensive overview of the Swedish child welfare system reviews its history, legislation and theoretical basis. It also presents statistics on child welfare.

Hessle, S. and Vinnerljung, B. 1999. *Child welfare in Sweden. An overview*. Stockholm: Stockholm university, departement om social work.

This report is intended for foreigners interested in Swedish child and youth welfare. It provides a good overview of essential facts and issues in this particular area, including legislation, statistics and the organisation of the system.

Lundström, T. 2000. "Om kommunernas sociala barnavård". [Public child care services]. In Szebehely, M. (red.) *SOU 2000:38, Välfärd vård och omsorg*.

Lundström presents an overview of the development of Swedish child and youth welfare, focusing particularly on the 1990s. The author analyses both the child and youth welfare system (i.e. their privatisation, the effects of cut-backs) and the development of child and youth welfare problems.

Szebehely, M. 1998. "Changing divisions in Carework: Caring for Children and Frail Elderly People in Sweden". In Lewis, J. *Gender, Social Care and Welfare State Restructuring in Europe*. Aldershot: Ashgate.

In this article the author compares care for the elderly and care for children from a gender-oriented perspective, providing statistics on both groups.

## Frail elderly, nursing homes, long-term care

Thorslund, M., Bergmark, Å. and Parker, M. 2000/2001. "The Social Welfare of the elderly in Sweden: are cutbacks a sign of systematic policy changes or simply a sign of adjustment to changes in public finances?" In *The International Library of Ethics, Law and the New Medicine – Volume of Ageing*. Kluwer: Kluwer Academic Press (forthcoming).

This chapter describes and analyses developments in Sweden's system of care for elderly against the background of challenges facing the Swedish welfare state. It also provides a brief historical background to the development of the welfare state and care for the elderly.

Szebehely, M. 2000. "Äldreomsorg i förändring – knappare resurser och nya organisationsformer". [Resource shortages and new organisational forms for services for the elderly]. In Szebehely, M. (red.) *SOU 2000:38, Välfärd vård och omsorg*. Szebehely provides an overview of the development of care for the elderly in the 1990s and presents current statistics on this area.

Szebehely, M. 1998. "Changing divisions in Carework: Caring for Children and Frail Elderly People in Sweden". In Lewis, J. *Gender, Social Care and Welfare State Restructuring in Europe*. Aldershot: Ashgate.

In this article the author compares care for the elderly and care for children from a gender-oriented perspective, providing statistics on both groups.

## Health care related social services, convalescence and rehabilitation: Alcohol and drug treatment

Bergmark, A. and Oscarsson, L. 1994. "Swedish alcohol treatment in transition? Facts and fictions". *Nordisk alkoholtidskrift*, 11 (English supplement): 43-54. This article discusses the size and structure of the treatment system for alcoholics, which comprises an important part of Swedish social services. The analysis puts special emphasis on relations between state, private and voluntary sector involvement.

Bergmark, A. 1998. "Expansion and implosion: The story of drug treatment in Sweden?" In Klingemann, H. and Hunt, G. *Drugs Demons and Delinquents*. Thousand Oaks, CA: Sage.

This article discusses the size and structure of the treatment system for drug abusers, which comprises an important part of Swedish social services. The analysis emphasises the relations between state, private and voluntary sector involvement.

## Social assistance

Puide, A. (ed.). 2000. *Socialbidrag i forskning och praktik*. [Social assistance in research and practice]. Stockholm: CUS/Gothia.

Puide's edited collection on social assistance, which includes many of the leading researchers in the area, provides a thorough overview of both clients and the system. Topics such as legislation and social assistance among immigrants and youth in Sweden are compared with the experience of other European countries.

Eardley, T., Bradshaw, J., Ditch, J., Gough, I. and Whiteford, P. 1996. *Social Assistance in OECD Countries: Country Reports*. [Chapter 21 Sweden]. London: HMSO. In chapter 21 the authors provide foreign readers an overview of the Swedish social assistance system. They describe legislation, the means-testing system and various policy questions, but do not offer relevant statistics.

Svedberg, L. 1994. *On marginality: a client group's relationship to work*. Stockholm: University Department of social work.

The author analyses social services, especially social assistance and work, beginning with one particular group of clients – single men.

Gunnarsson, E. 1993. *I välfärdsstatens utmarker: om socialbidrag och försörjning bland ensamstående kvinnor utan barn*. [Social services for single mothers and the welfare state]. Stockholm: Univ. Dep of social work.

Drawing on interviews with single woman dependent on social assistance, this

book presents a qualitative analysis of the importance of social assistance and other sources of income for a particular group of clients.

## Homelessness

Swärd, H. 1998. *Hemlöshet: fattigdomsbevis eller välfärdsdilemma?* [Homelessness]. Lund: Studentlitteratur.

The author discusses various explanations and theories of modern homelessness in welfare states. He also presents statistics on the occurrence of homelessness and compares the situation in Sweden to that of other countries.

Swärd, H. 1999. "Homelessness in Sweden – Discussion, Patterns and Causes". *European Journal of Social Work*, 2: 289-303.

Swärd summarises his earlier work (1998) on homelessness, discussing theories of homelessness and current statistics on homelessness Sweden and other countries.

## Immigrants and refugees

Soydan, H., Jergeby, U., Olsson, E., Harms-Ringdahl, M. 1999. *Socialt arbete med etniska minoriteter*. [Social work and ethnic minorities]. Stockholm: CUS/Liber.

This book provides an overview of social work conditions and practices involving clients from ethnic minority groups. It presents research both on Sweden and other countries.

## D. Summary assessment of current debates

One much debated field of social services in Sweden is care of the elderly. Both the quality of services offered and the ways they are organised have been questioned. The economic pressures of elderly care became especially high during the 1990s. During this time many private companies first established elderly care services. As public scandals involving private companies have emerged, the quality of care they offer and the privatisation of services more generally has been cast into question.

The negative and positive effects of privatisation (and other "new management models") have also been debated in relation to other social service fields. From time to time there have been attempts to privatise parts of the individual social services (social assistance, child welfare, etc.). One crucial question in this respect has been how far privatisation should go when it comes to the exercise of public authority. For example, should private companies be allowed to carry out investigations in child protection cases?

In recent years the quality of social services has also been questioned across fields (i.e. social assistance, child welfare and substance abuse treatment). Both the academic world and central authorities have demanded higher quality standards. Two key themes in this respect are knowledge-based social work and evidence-based social work.

## UK

by Norman Johnson

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### A. Synopsis of social service system

The personal social services consist of social care (distinct from health care) provided by local authority social services departments and by a variety of related agencies for various social groups including the elderly, children and families, people with physical or learning disabilities, and those with mental illness. Services may be provided to individuals, groups or communities. They may be delivered in clients' own homes, in residential establishments or in day care facilities. In the 1990s, and particularly since 1993, social service departments increasingly used contract arrangements with independent social service providers, either voluntary associations or for-profit agencies. However, local authorities retain responsibility for financing and regulating both. Another important social service provider is the family, particularly for caring work.

In 1997/98 the total gross expenditure on personal social services in England was £9.98 billion. This was 90% higher in real terms than the figure for 1987/88. Even so, this expenditure amounted to only 1.5% of the GDP and is dwarfed by expenditure on other services: over £100 billion on social security, over £40 billion on health services and just under £40 billion on education. Almost 60% of social services staff work part time, but in 1998 the number of full-time equivalents and was 224,000. Only a small proportion of these are professionally qualified social workers.

The target group receiving the greatest social service provision is the elderly, with almost 50% of the total expenditure, followed by services for children at 23%. Just under half of all expenditure is devoted to residential care and about 35% to day and domiciliary care. On 31 March 1998, English local authorities supported 249,438 people in residential care; 81% of residents were age 65 and over, and just over 10% had learning disabilities. A survey conducted in September 1997 found that in one week local authorities provided 756,000 meals for 247,000 people, and 2.6 million hours of home care for 479,000 households – the chief beneficiaries in both cases being elderly people. In the same week, local authorities provided 632,000 day centre places with 490,000 filled, mainly people with learning disabilities. In 1999 local authorities in England looked after 55,300 children, 65% in foster placements. An additional 31,900 children were on child protection registers. These figures do not provide an accurate indication of services for children, which are not restricted to children in residential care or on child protection registers. At the other end of the scale, services for the mentally ill took only 5% of social services expenditure.

Social services are financed primarily by central government and to a lesser extent through local taxation (the council tax). However an increasing proportion is derived from sales, user fees and charges; in fact almost a quarter of the gross expenditure on services for elderly people in 1997/98 was recuperated through these sources.

## B. Annotated Bibliography

### 1. Comprehensive works, overview volumes, classics on social services and the welfare system

Adams, R. 1996. *The Personal Social Services*. London: Longman.

The stated aim of this book is to 'set out the major features of the personal social services in Britain'. It provides a comprehensive overview of the personal social services and the demands being made upon them. It focuses on changes in how services are delivered and the impact of these changes on service users, their relatives, households and carers. It also identifies the differing theoretical perspectives underlying the major policy initiatives since the 1960s. As with all of the books in this Longman series, there are extracts from key documents. It is a clearly expressed and useful introduction to the personal social services in Britain.

Johnson, N. 1997. "The Personal Social Services and Community Care". Pp. 77-100. In Powell, M. (ed.) *New Labour, New Welfare State? The 'Third Way' in British Social Policy*. Bristol: The Policy Press.

The book in which this chapter appears poses three questions: (i) To what extent do the policies of New Labour differ from Old Labour? (ii) To what extent do the policies of New Labour vary from the New Right? (iii) How far do any changes suggest a new welfare state. The chapter seeks to answer these questions in relation to the personal social services and community care. Having considered the Conservative legacy inherited by Labour it examines the policies pursued by the Labour Government in this area. The tentative conclusion is that in several respects Labour has maintained some policies of their Conservative predecessors, although with differences of style and emphasis, but that there are also some points of departure, notably with respect to carers, child care and the family.

Townsend, P. et al. 1970. *The Fifth Social Service: A critical Analysis of the Seebohm Proposals*. London: Fabian Society.

This classic and compelling book contains the reflections of nine leading Fabians in the early days of social services departments thirty years ago. While there have been major changes in the intervening period, the knowledge this book provides of the origins of social services departments adds to our understanding of their

present operation. The book critiques the Seebohm proposals recommending the establishment of the new departments, and of the ensuing government legislation that established them. Townsend sets the scene for the ensuing debate with a chapter on the objectives of the new social services. Subsequent chapters include one by Sinfield on the future of social work; one by Kahan on the likely impact on child care services; a chapter on housing by Rose; one on community mental health services by Mittler; two chapters on older people by Michael Meacher, who currently holds ministerial responsibility for the environment, and by Agate; and two on welfare rights by Lynes and Bull.

## 2. Supply and demand

The overview entries all deal with this topic as do entries under financing. Rationing and the modes of delivery are important determinants of supply. For this the following should prove useful:

Le Grand, J. and Bartlett, W. (eds.) 1993. *Quasi-markets and Social Policy*. Basingstoke: Macmillan.

Bartlett, W., Propper, C., Wilson, D. and Le Grand, J. (eds.) 1994. *Quasi-markets in the Welfare State*. Bristol: School for Advanced Urban Studies, University of Bristol.

Bartlett, W., Roberts, J. and Le Grand, J. (eds.) 1998. *A Revolution in Social Policy: Quasi-market Reforms in the 1990s*. Bristol: Policy Press.

These three publications stem from the same research project and share some overlap in editorship. Research into quasi-markets was launched at the School for Advanced Urban Studies under the leadership of LeGrand, now at the LSE. The London School of Health and Tropical Medicine is also now involved. Most chapters are based on conference papers. The earliest volume contains one chapter on social care, but this should be read in conjunction with the introduction and chapters on the theory of quasi-markets and regulation. The second volume also has an interesting chapter on regulation, and three chapters are devoted to social and community care. The third volume ranges far and wide, with some contributions from other countries. The two chapters in Part Three relate directly to social care. Together the three volumes cover a wide variety of topics including markets, user empowerment, impact on the independent sector, choice of providers, choice for users and regulation.

Milner, J. and O'Byrne, P. 1997. *Assessment in Social Work*. Basingstoke: Macmillan.

This book identifies the central importance of need assessment and helps social

workers deal with the uncertainties and ambiguities associated with it. The authors discuss the meaning of assessment and the contexts in which it takes place. Assessment has become increasingly onerous, especially since the implementation of the NHS and Community Care Act and the appointment of care managers. It is particularly stressful when resources are short and a supposedly needs-led service is in danger of becoming resource-driven. Assessment is about need in relation to resources. If user involvement is taken seriously, discussions and negotiation may be drawn out. The Children's Act and the Criminal Justice Act have also contributed to the expansion of assessment.

### **3. Definition, forms and types of service**

The overview entries deal with this topic, as do the entries in Section C: Special Fields. There are several ways to categorise services, for example: (i) domiciliary care, day care and residential care; (ii) community as opposed to institutional care; (iii) general versus specialist services; (iv) services categorised according to the degree to which they involve users and carers; (v) single agency services as opposed to multi-agency services. Those consulting the bibliography will be able to select readings using some of these typologies.

### **4. Organisational aspects, forms, ownership and auspices of providers**

Recent changes in the UK have led to increasing use of partnerships. This means that many services are provided on a shared basis. Community care is supposed to be built on the principles of partnership.

Lewis, J. and Glennerster, H. 1996. *Implementing the New Community Care*. Buckingham: Open University Press.

The book examines the implementation of the National Health Service and Community Care Act (1990) in five local authorities between 1992 and 1994, focusing on three major issues: (i) the purchaser/provider split and the creation of the social care market; (ii) the introduction of care management; (iii) attempts to collaborate with health authorities. The responses of the five social services departments were considerably diverse, but the new community care policies were broadly welcomed by social workers due to their potential to develop more user-based practice and greater consumer choice. The authors identify the reasons for the diverse responses and describe the changes in social services departments due to the implementation of community care.

Means, R. and Smith, R. 1998. *Community Care Policy and Practice*, Second Edition. Basingstoke: Macmillan.

The first edition of this book was among the best of its kind. The second edition, published after the main features of the restructuring of welfare had been established for five years and the Labour government for one year, is a revised, extended and updated version of the earlier work. It achieves a good balance between description and analysis of major issues, in particular user and care empowerment. It begins with a history of community care, describing the movement from institutional care to care in the community. An informative discussion is provided on the changing roles of the major providers and their increasing collaboration. Housing is seen as a vital component of successful community care, and the need for multi-agency partnerships is stressed. Interestingly, there is a chapter on European perspectives on community care.

Deakin, N. 1996. *Meeting the Challenge of Change: Voluntary Action into the 21st Century. Report of the Commission on the Future of the Voluntary Sector*. London: National Council for Voluntary Organisations.

The role of voluntary organisations as service providers has increased in recent years. This helpful report is concerned with the whole voluntary sector, but there is ample material relating to the personal social services. The report attracted a great deal of attention when published and it is still constantly cited. Part I identifies the context for voluntary action, giving definitions and outlining the anatomy, resources and extent of the sector. Part II looks at the external relations of the voluntary sector, including relations with central and local government and business. Part III considers the sector's working environment. Part IV is concerned with issues of performance and governance, and Part V provides an agenda for action. Throughout Deakin makes recommendations for central and local government, business, other funders, intermediary bodies and voluntary organisations. The report is densely packed and closely argued.

Johnson, N. Jenkinson, S., Kendall, I., Bradshaw, Y. and Blackmore, M. 1998. "Regulating for quality in the voluntary sector." *Journal of Social Policy* 27 (3): 307-328.

The implementation of the NHS and Community Care Act, the greatly increased use of voluntary sector providers, and the switch from grants to contracts form the background to this research based study. The article brings together two main themes of current social policy debate in the personal social services: regulation and quality assurance. Contracts are seen as increasingly significant forms of input, process and output regulation. The results from the empirical study are discussed in the context of evidence from other parts of Britain and the United States. The main issues identified in this discussion are competition, consumer choice, user involvement, the dangers of excessive and inappropriate regulation, the importance of trust and risk, and the relationship of resources to quality.

Kendall, J. and Knapp, J. 1996. *The Voluntary Sector in the UK*. Manchester: Manchester University Press.

Produced as part of the Johns Hopkins Comparative Nonprofit Sector project, this is the best and most comprehensive general account of the UK voluntary Sector. The authors provide several contextual and theoretical chapters covering historical development and the legal position of the voluntary sector, and mapping the sector and recent developments in state/voluntary sector relations. Separate chapters on education, health and social care are then provided. In the chapter on social care the authors examine residential care for older people, childcare services and community mental health services. The authors further provide perceptive analysis of the impact of contracting.

Walsh, K., Deakin, N., Smith, P., Spurgeon, P. and Thomas, N. 1997. *Contracting for Change*. Oxford: Oxford University Press.

This scholarly and thoroughly researched treatment of contracting is not restricted to the personal social services, but social care is given a fair share of attention. The empirical work is set firmly within a theoretical context. The introductory chapters identify changes in the public sector and explore the processes of public sector management change, including the introduction of contracts. The research examines the structure and management of contracts and the problems associated with the operation of markets in the public sector. There is an interesting chapter on the international experience, but the authors warn against making too facile assumptions about globalisation – contracts may mean different things in different national contexts.

Coulshed, V., Mullender, A. and Malahleka, B. 1999. *Management in Social Work*, Second Edition. Basingstoke: Macmillan.

This is a substantially revised edition of a classic text aimed at social workers and social services managers. The material in the first edition – theories of management, planning monitoring and evaluation, customer care and quality standards, the management of staff – is updated and anti-oppressive elements have been given greater prominence. “Best value” in resource utilisation and user outcomes is now addressed and considerable attention is given to empowering styles of management. The book achieves a reasonable balance between theory and practice and a clear picture emerges of how social services organisations work.

Langan, M. and Clarke, J. 1994. „Managing in the Mixed Economy of Care“. Pp. 73-92 In Clarke, J., Cochrane A. and McLaughlin, E. (eds.) *Managing Social Policy*. London: Sage.

The Childrens Act (1989) and the NHS and Community Care Act (1990) created pressure to change the managerial culture and practices in social services departments from welfare agencies run by professionals into a network of customer-focused services run by managers. This chapter examines the case for change and

some of the problems with implementing new structures and working arrangements. Among concerns was the extent to which social work values were compatible with the new business ethos being applied to the personal social services. Another problem for senior managers was the difficulty of achieving cultural change throughout the organisation. Possibly the greatest problem was that the transition took place in a time of severe resource constraint. Care managers had a key role because they were responsible for constructing care packages and maintaining relationships with direct providers.

Smith, G. and O'Hara, P. 1992. „Managing Social Services in the 1990s“. Pp. 235-274 In Willcocks, L. and Harrow, J. (eds.) *Rediscovering Public Services Management*. London: McGraw-Hill.

This chapter identifies three sets of problems confronting managers in personal social services: (i) social policy and legitimacy; (ii) problems associated with running service organisations; (iii) problems of managing change. Management leadership, organisational style, definition of service, management techniques and strategy, and the most appropriate organisational structures to facilitate strategies are all covered in some detail. There is also an extensive discussion of the role of information technology in managing the personal social services.

## 5. Financing

Carr-Hill, R., Rice, N. and Smith, P.C. 1999. “The determinants of expenditure on children’s personal social services”. *British Journal of Social Work* 29(5): 679-706.

This is a report of a statistical study commissioned by government into expenditure on personal social services for children. The research sought to identify the determinants of expenditure in twenty-five local authorities. Five factors were found to have an impact on levels of spending: the number of children in lone-parent families; the number of children in families on income support; the number of children in families living in flats; the number of children with limiting, long-standing illness; and population density. To various degrees these factors are all associated with deprivation. Although the article deals specifically with children, it has relevance for other client groups, for whom it would indeed be interesting to see similar research conducted.

Evandrou, M. and Falkingham, J. 1998. “The Personal Social Services”. Pp. 189-256. In Glennerster, H. and Hills, J. (eds.) *The State of Welfare: the Economics of Social Spending*, Second Edition. Oxford: Oxford University Press.

The first edition of this book examined the development of the British welfare state between 1974 and 1988. This edition extends the analysis to 1997, the end of the period of Conservative governments. It contains a very substantial chapter,

enhanced by being situated within a more general consideration of social spending. The chapter is divided into four parts: Goals and Policies; Expenditure Trends; Outputs – extent, efficiency and effectiveness; Outcomes. The level of scholarship is exemplary, with meticulous attention to detail and a careful weighing of evidence. The chapter is clearly written and the copious use of charts, tables and graphs makes for relatively painless assimilation of a wealth of statistical material. There is a brief but useful guide to further reading.

Glennerster, H. 1997. *Paying for Welfare: Towards 2000*, Third Edition. Hemel Hempstead: Prentice Hall Europe.

In its third edition Glennerster's work has become a classic textbook, appearing on reading lists for students pursuing a wide variety of courses. Each of the three editions (1985, 1992 and 1997) has a different sub-title. Only chapter 11 deals specifically with the personal social services, however it is highly valuable to set personal social services expenditure within a more general framework of spending in other policy areas, which this book does. Equally valuable is the introductory section dealing with theories and concepts. Other sections cover the controlling institutions and funding sources. The concluding section seeks to answer the question "Can we afford the welfare state?".

## 6. Staff and volunteers

Balloch, S., McClean, J., Fisher, M. (1999) (eds.) *Social Services: Working Under Pressure* Bristol: Policy Press.

This is a timely and ground-breaking examination of the workforce and working conditions in social services departments at a time of major changes in the organisation and delivery of social care services. Drawing on an extensive empirical investigation, the book explores the work histories of social services staff, describes their current jobs and examines their work experiences. In so doing, it reveals the key areas of both stress and satisfaction and provides evidence of the considerable racism, discrimination, abuse and violence staff experience. Uniquely, comparisons are provided between England, Scotland and Northern Ireland and between managers, social workers, home care and residential staff. The book concludes by drawing out the implications for policy and practice.

Butt, J. and Davey, B. 1997. "The Experience of Black Workers in the Social Care Workforce". Pp. 141-161. In May, M., Brunson, E. and Craig, G. (eds.) *Social Policy Review 9*. London: The Social Policy Association.

Based on two research studies, the authors explain why social care agencies take greater interest in black workers and discuss the role of black workers in service delivery. Among the topics covered are: equal opportunities; discrimination at work; racism by service users and relatives; and racism by colleagues and man-

agers. The level of departmental support was assessed and found wanting. The authors conclude that one way out of the present malaise is to recognise the value of the social care practice of black workers, focusing on the challenges that this poses for “mainstream” social care practice.

Lawler, J. and Hearn, J. 1997. “The managers of social work: the experiences and identifications of third tier social services managers and the implications for future practice.” *British Journal of Social Work* 27 (2): 191-218.

The article is based on empirical work involving 128 social services third tier managers in seventeen social services departments. The article outlines some of the current debates within social work management and reports the experience and identifications of those who took part in the study. Among the debates and issues examined in the article are management development, interpretations of management, managers’ careers and homogeneity. The most significant finding was the fragmentation of experience, attitudes and management approaches. This has implications for research and policy development, social work management in general, social work practice and social work education.

Pahl, J. 1994. „Like the Job – but hate the organisation: social workers and managers in social services.“ Pp. 190-210. In Page, R. and Baldock, J. (eds.) *Social Policy Review* 6. London: Social Policy Association.

This chapter examines several questions relating to social workers and managers in social services departments: (i) to what extent do the goals and values of the two groups differ? (ii) how do the two groups perceive each other, given that most managers have themselves been practitioners? (iii) have recent changes in social services increased or diminished the differences between the two groups? (iv) what are the implications of the experiences of the two groups for the changing shape of social care? Answers to these questions were sought through a series of interviews with managers and social workers. Pahl’s conclusion is that the differences between the two groups, in terms of their tasks, roles, values and commitment, remained. The key issue seemed to be the relative power of the two groups.

Gaskin, K. and Davis Smith, J. 1995. *A New Civic Europe?: A study of the Extent and Role of Volunteering*. London: The Volunteer Centre.

In this comparative study of volunteering in ten countries including Britain and two East European countries, eight countries were selected for an omnibus survey. The authors found that in these countries about 25% of the population had taken part in a voluntary activity during the previous year. However, participation rates varied, the highest rates in the Netherlands and Sweden (40%) and lowest rates in Slovakia, Bulgaria and Germany. Germany had the highest frequency of volunteering, while Britain had a large number of infrequent volunteers. The most important finding was the distinctiveness of national volunteering.

Knapp, M., Koutsogeorgopoulou, V. and Davis Smith, J. 1996. "The economics of volunteering: examining participation patterns and levels in the UK." *Non-Profit Studies* 1 (1); 38-55.

This paper summarises recent UK statistics on voluntary work and considers the value of volunteers in the organisations they work for. The bulk of the study examines the motivations and characteristics of volunteers themselves, and the apparent links between some of the motivating factors and the observed patterns of volunteering. Economic models of volunteer supply are employed and the available data is subjected to econometric analysis.

Russell, L. and Scott, D. 1997. *Very Active Citizens? The Impact of Contracts on Volunteers*. Manchester: University of Manchester.

This book presents the results of a large-scale and thorough survey. The chief executives of 15 local agencies were interviewed and a postal questionnaire was sent to senior staff of 360 branches of a national federated organisation working with older people. The views of senior managers with responsibility for purchasing services were also sought. What gives the report greater authenticity, however, is a postal survey of 275 volunteers involved in service delivery or serving on governing bodies, followed-up by 70 interviews. Results confirm evidence from other sources that agencies have difficulty recruiting volunteers as office-holders or as members of management committees and volunteers engaged in service delivery. More surprising perhaps is that many of those recruited expressed high levels of satisfaction, welcoming the tighter structure and closer supervision.

## 7. Clients, users and consumer issues

Consumer involvement has been a major focus in British social policy, and more specifically in the personal social services and social work profession. This means that there are references to the issue in many of the other entries, especially in the section on special fields, in addition to those listed below.

Baistow, K. 1994/5. "Liberation and Regulation?: Some Paradoxes of Empowerment." *Critical Social Policy*, 14 (3): 34-46.

The idea of user empowerment emerged during the 1990s as a concept with great social desirability, attracting ideologues from both right and left. In particular a new, quasi-moral responsibility was placed on state professionals to empower those with whom they work. This article critically engages with the concept of empowerment and highlights the potential tension between its liberating and regulatory implications. The author examines the specific dilemmas of empowerment as professional practice and argues that, in the context of New Right approaches to state welfare provision, user-empowerment may increasingly become an ethical obligation of the new citizenry.

Barnes, M., Harrison, S., Mort, M. and Shardlow, P. 1999. *Unequal Partners: User Groups and Community Care*. Bristol: The Policy Press.

This report is based on empirical work in two policy areas: mental health and disability. Both user and public authority perspectives are considered. The crucial distinction between consumerism and citizenship is explored, as is the need to distinguish between user self-organisation or self-help and user involvement. The authors discuss strategies user groups adopt to achieve their objectives, and how statutory agency officials can support self-organisation without controlling it.

Forbes J. and Sashidharan, S.P. 1997. "User-involvement in services: incorporation or challenge?" *British Journal of Social Work* 27 (4): 481-498.

A reappraisal of the broader concerns in user involvement, this article considers the issue in relation to social work and psychiatric services. The authors note the difficulty of agreeing on a definition of users. They claim that users are increasingly being drawn into the organisation and delivery of social work and mental health services, but note the possible contradiction between what users may want and what user-based services are likely to offer. The limitations of the consumerist approach are identified. Users may be given voice, but there may be no realistic means of exit. The enforcement of existing legal rights would represent an improvement. The extent of user-involvement varies from service to service and even between different elements of the same service. There is also diversity among users themselves, some being fully involved and others not at all. The key issue is the unequal power relation between providers and users. Opposition to present services and their underlying ideologies can be articulated only if there is a shift in the balance of power in favour of users.

Harris, J. 1999. "State social work and social citizenship in Britain: from clientelism to consumerism." *British Journal of Social Work* 29 (6): 915-937.

This article examines the central issues and debates surrounding the idea of social citizenship during the development of state social work in post-war Britain. In this period, the author argues, state social work secured a central position as a result of its unification and incorporation into bureau-professional regimes responsible for responding to citizens' social needs as clients of the state. The New Right's attack on the institutionalisation of social citizenship within such regimes included the accusation that state social work had infringed upon service-user rights, creating a passive, dependent clientele. The alternative formulation of the 'consumer-citizen' led to the development of a new social consensus on social citizenship. Starting from this consensus, the author examines the extent that procedural rights can extend social citizenship in state social work, and prefigure wider participation by service users.

Robson, P., Locke, M. and Dawson, J. 1997. *Consumerism or Democracy? User Involvement in the Control of Voluntary organisations*. Bristol: The Policy Press.

This is a short pamphlet rather than a book, but it addresses an important issue. It is sometimes assumed that voluntary organisations are naturally superior to their statutory counterparts in terms of user-involvement. This claim is based on very little research evidence. This pamphlet explores the ways voluntary organisations, particularly the traditional service providing charities, might be encouraged to consider the issues they face in promoting greater user involvement. The emphasis is on reform from within. The topic has gained significance because of community care reforms and the greater reliance on contracts. Local authorities are increasingly relying on user and carer involvement as criteria for awarding contracts.

Stanley, N. 1999. "User-practitioner transactions in the new culture of community care." *British Journal of Social Work* 29 (3): 417-435.

This case study of a single authority examines user and practitioner influences on client/need assessment in the context of the changing culture of community care after the 1990 NHS and Community Care Act was implemented. It reports the views and experiences of social workers, managers and users. Those making the assessments expressed dissatisfaction with some aspects of the care management processes, but had come to terms with the system in general. Managers were consistently more enthusiastic about the new processes. Users stressed the benefits of increased consumer choice.

## **8. Efficiency, effectiveness and equity of social service provision and financing**

Baldock, J. 1997. "Social care in old age: more than a funding problem." *Social Policy & Administration* 31 (1): 73-87.

The provision of long-term care for frail older people is the subject of intense debate in the UK. This article engages in the debate but warns that the current emphasis on funding may crowd out equally important discussion of who should provide care and through which models of care. Although evidence is somewhat patchy, it is clear that many of those who need care are not receiving any help and that conversely some of those who are receiving formal help are not in the high-need category. This quite clearly raises important equity issues. Please see next entry for one approach to this problem.

Blackman, T. 1998. "Facing Up to Underfunding: Equity and Retrenchment in Community Care." *Social Policy and Administration* 32 (2): 182-195.

Blackman provides an account of how one large local authority attempted to distribute its cash-limited budget more equitably by switching from a system of distributing resources based on the previous year's spending to a formula-based system. The author claims that basing resource distribution on individual eligi-

bility can very well produce an inequitable distribution. In this system, receipt of a service is dependent upon expressed need and on those in greatest need seeking help. A formula-based approach was used to distribute the total home care budget. It began with population projections weighted to account for the number of older people, people in non-white ethnic groups, and people who are chronically ill or disabled. Secondly it used indicators of deprivation. One of the most interesting aspects of this change was that plans were made to test the efficacy of the new arrangements – whether resources reached those with greater needs – and the results were encouraging.

Forder, J., Knapp, M. and Wistow, G. 1996. “Competition in the Mixed Economy of Care.” *Journal of Social Policy* 25 (2): 201-221.

One of the principal aims of the NHS and Community Care Act was the development of markets in social care to improve efficiency, regulation, quality assurance and choice for consumers. The key to these desirable outcomes would be the competition brought about by the purchaser-provider split and the greater use of contracts. Local authorities moved from being direct providers to being enablers, purchasers and regulators. Independent providers would compete for contracts. This article claims that local authorities had little understanding of the functioning and imperfections of markets. There might be inefficiencies associated with social care markets that cannot therefore guarantee to deliver the services required. The paper identifies structural and information imperfections, and provides insight into how to minimise effects of these drawbacks.

Nocon, A. and Qureshi, H. (1996) *Outcomes of community care for users and carers*. Buckingham: Open University Press.

This book was one of the first to address the difficult question of how to evaluate the impact of social care interventions – a question which remains relevant today. It examines the meaning of ‘outcomes’ and considers the conceptual and practical difficulties of measuring outcomes in a range of service contexts. Accessible to a lay audience, the text examines the issues from both researcher and practitioner viewpoints and explores the perspectives of service users and their carers. The present government has announced its intention to set performance indicators which will be applied to the personal social services (See *Modernising Social Services*, London: HMSO). They might be advised to consult this book first.

Ungerson, C. 1997. “Give them the money; is cash a route to empowerment?” *Social Policy and Administration* 31 (1): 45-53.

Morris, J. 1997. “Care or empowerment: a disability rights perspective.” *Social Policy and Administration* 31 (1): 54-60.

These two articles, appearing in the same publication, are representative of a debate about the rights of carers and the empowerment of disabled people and

others – a debate particularly contentious regarding young carers (see Becker, S. in this bibliography). In both articles the main focus of the debate is the Direct Payments Act, which gives disabled people the opportunity to replace direct services with a cash payment for employing personal assistants or purchasing appropriate care from an agency. The Independent Living Movement has been campaigning for such a change for many years. Ungerson, while recognising the potential benefits of cash payments, has some serious reservations. The chief among these relates to the position of personal assistants; she believes that the rights and empowerment of this group should be considered alongside those of the disabled people. Rates of pay are likely to be low and a main characteristic of the market is that both providers and purchasers are poor and vulnerable. Morris takes issue with this evaluation. She enters into the debate about young carers, describes the campaign for direct payments and concludes that, although the scheme is far from perfect, the direct payments legislation is an important step in the achievements of a civil rights movement.

## 9. Patterns of relations among providers

Ovretveit, J., Thompson, T. and Mathias, P. (eds.) 1997 *Interprofessional Working for Health and Social Care*. Basingstoke: Macmillan.

The editors of this book participate in seven of the ten chapters. Ovretveit, one of the foremost writers in this area (author of the influential publication in 1993, *Coordinating Community Care*), authors four chapters and contributes to a fifth. The history of community care is characterised by competition for resources between acute hospitals and primary care and between health and social care. There has been some improvement in interprofessional relations in recent years, although there is still a long way to go. Further reorganisation in the NHS, with changes in responsibilities, means new relationships will have to be forged. This volume is concerned with how joint working can best be achieved. To make the points more clearly, case examples are used. Ovretveit's original four models are utilised and there is discussion of planning and management teams; patient power and participation. Education and training in preparation for interprofessional work is given some prominence.

Taylor, M. 1997. *The Best of Both Worlds: Partnership Between Government and Voluntary Organisations*. York: Joseph Rowntree Foundation.

This very useful and informative review draws on research into the voluntary sector conducted on behalf of the Joseph Rowntree Foundation for five years. The main focus of the research was the changing relationships between government and the voluntary and community sectors, particularly at the local level. Taylor integrates a diversity of information into a coherent and interesting analysis with considerable success. There is some useful general information on the sector, but

the main body of the report is concerned with government/voluntary sector partnerships: how they are formed and what is required to sustain them while retaining the distinctive features of voluntary organisations; partnerships in service provision; partnerships in policy. The report discusses the fundamental tensions that partnerships must address and suggests guidelines for both government and voluntary organisations.

## 10. Innovation and change

Most change and innovation has been concerned with developments stemming from changes in legislation, particularly the new community care arrangements. Developments have been mainly in two areas – user and carer involvement, and empowerment and new partnerships – both covered elsewhere in this bibliography. The following provides a brief selection of innovative programmes.

Coombs, M. and Sedgwick, A. 1998. *Right to Challenge: The Oxfordshire Community Care Rights Project*. Bristol: The Policy Press.

This short report evaluates a project initiated by the Oxfordshire Community Care Advisory Group – a consortium of eleven voluntary agencies. The Group employed an independent community care rights action researcher to assist people in getting their full rights under the community care legislation. This evaluation examines what such a service can achieve. It reports on people's experience of information and consultation, assessment and care planning, charging regimes, and complaints procedures.

Dobash, R.P., Dobash, R.E., Cavanagh, K. and Lewis, R. 1999. "A research evaluation of British programmes for violent men." *Journal of Social Policy* 28 (2): 205-233.

Dobash and Dobash have been among the leading figures in studies of domestic violence for more than two decades. Most of their earlier work focused quite rightly on abused women themselves. They turned their attention towards programmes for violent men in the early 1990s. This article presents the results of the first British study of programmes for violent men. While such programmes are fairly common in the United States, in this country they are still in the innovative stage. The three-year study involved in-depth interviews and postal questionnaires. In general findings were positive: the authors concluded that this form of intervention can make a valuable contribution to reducing violence against women.

Walker, A. and Warren, L. 1996. *Changing Services for Older People: The Neighbourhood Supports Unit Innovation*. Buckingham: Open University Press. This is an evaluation of an innovative scheme for older people in Sheffield. The

book begins with a short but interesting review of changing social care services in Europe. It considers the reasons for the trend towards innovation in services for older people. The major part of the book is concerned with the evaluation of the Neighbourhood Supports Unit, paying particular attention to the reactions of older people. More generally, drawing on evidence gathered from policy-makers, managers and front-line workers, Walker explores the process of innovation in social services.

## 11. European Union and globalisation issues

Lorenz, L. 1994. *Social Work in a Changing Europe*. London: Routledge.

This thought-provoking book takes a thematic approach rather than the more common country by country approach adopted in many cross-national studies. Lorenz looks at the historical, conceptual and ideological origins of social work in different countries and shows how these relate to variations in practice. He looks at the Christian and socialist traditions and the influence of the women's movement. A particularly interesting chapter explores the position of social work under national socialism and the period of democratic reconstruction. Different academic discourses are identified and discussed. The main message in the book is social work's task in promoting European integration by confronting racism and other forms of discrimination, and by helping create user-controlled services.

Munday, B. and Ely, P. (eds.) 1996. *Social Care in Europe*. Hemel Hempstead: Prentice Hall/Harvester Wheatsheaf.

Until relatively recently, comparative studies of welfare states have concentrated on social security, the proportion of GDP devoted to social expenditure and the comparison of welfare regimes. In the early 1990s there were several publications looking at social work, but this book was one of the earlier attempts to look at the broad area of social care in the European Union. The book addresses the thorny issue of definitions of social care in different countries and the problems this causes for researchers. A brief description of the systems in each of the countries is followed by a chapter on the role of the EU in social care policy. A consideration of the mixed economy of welfare is followed by specific studies of care for specific groups of users. The remaining chapters are devoted to social care for three client groups: children and families, people with disabilities and older people.

Williams, C., Soydan, H. and Johnson, M.R.D. (eds.) 1998. *Social Work and Minorities: European Perspectives*. London: Routledge.

This interesting collection of papers looks at the relationship of social work in Europe to issues associated with assimilation, multi-culturalism, migration, racism,

marginalisation and social exclusion. Part I sets the conceptual and theoretical scene. Part II consists of case studies of some common themes. Part III considers implications for the future of social work practice. The book deals with a variety of minorities including racial minorities, migrants and guest workers, refugees and asylum seekers, linguistic minorities, religious minorities and gypsies. Included in the case studies are the problems faced by Bosnian and Somali refugees.

## 12. Bureaucratisation and/or commercialisation problems

Baldock, J. 1998. "Old Age, Consumerism and the Social Care Market". Pp. 165-182 In Brunson, E., Dean, H. and Woods, R. (eds.) *Social Policy Review 10*. London; Social Policy Association.

Baldock sets the rise of consumerism in social care for older people against the context of changing entitlements to social care, the increasing tendency of local authorities to concentrate expenditure on those with greatest need and lowest income, and confusion between social entitlement and private liability. The author examines arguments for a more cash-driven care market. While recognising advantages that might stem from such an approach, the author identifies three limiting factors: (i) growing inequality in pensioners' incomes increases inequality in pensioners' abilities to participate in social care markets; (ii) social care is not a simple commodity and the markets for care are diverse and complex; (iii) some older people are frail, mentally disabled and vulnerable and are in no position to shop around.

Walker, A. 1993. "A Cultural Revolution? Shifting the UK's Welfare Mix in the Care of Older People". Pp. 67-88. In Evers, A. and Svetlik, I. (eds.) *Balancing Pluralism: New Welfare Mixes in Care for the Elderly*. Aldershot: Avebury.

This chapter offers a closely argued critique of shifts in the welfare mix during the last period of Margaret Thatcher's government and the early years of John Major's. Walker argues the direction of change is similar in all advanced welfare states, but that the process of change in the UK was much faster and the changes more extreme. The main reason given for this discrepancy is the ideological commitment of the Conservative leadership (and especially Mrs Thatcher) to rolling back the state. This commitment articulated grassroots pressures for change. The result was further residualisation of services and the growth of the private sector. Walker argues that the claimed benefits of the changes are unlikely to materialise. Choice is not extended, rights are reduced, consumerism rather than empowerment is promoted, and pressures on families and carers are increased.

Wistow, G., Knapp, M., Hardy, B. and Allen, C. 1994. *Social Care in a Mixed Economy*. Buckingham: Open University Press.

Wistow, G., Knapp, M., Hardy, B., Forder, J., Kendall, J. and Manning, R. 1996. *Social Care Markets: Progress and Prospects*. Buckingham: Open University Press.

These two publications share closely related subject matter and overlapping authorship. Although other research by members of the group informs the work, both books are primarily based on research commissioned by the Department of Health and conducted by Members of the Personal Social Services Research Unit and the Nuffield Institute for Health. Both books report on different phases of the same research project, which involved interviews with senior officers and members (elected representatives) in twenty-five local authorities. The reports examine the experiences of and attitudes toward operating within social care markets. The second round of interviews enabled researchers to check on the progress made. The earlier book is more descriptive, the later more evaluative.

### 13. Comparative, cross-national issues

Salamon, L. M. and Anheier, H. K. (eds.) 1997. *Defining the Nonprofit Sector: A Cross-national Analysis*. Manchester: Manchester University Press.

This is just one of many publications stemming from the Johns Hopkins Comparative Nonprofit Sector Project. This extremely productive project was the first comprehensive attempt to empirically examine the nonprofit or voluntary sector over a wide range of countries. Thirteen countries were included in the original project: seven developed countries (France, Germany, Italy, Japan, Sweden, the UK and USA); five developing countries (Brazil, Egypt, Ghana, India and Thailand); and one country from the former communist bloc (Hungary). The book is divided into five parts. Part I provides a well-conceived and executed framework; Parts II, III and IV cover the three groups of countries outlined above; Part V deals with Hungary. It adds enormously to our understanding of the nonprofit sector in different countries. While the book relates to the voluntary sector as a whole the personal social services are well covered.

Ungerson, C. 1995. "Gender, Cash and Informal Care: European Perspectives and Dilemmas." *Journal of Social Policy* 24 (1): 31-52.

The article, based on conceptual and empirical evidence, covers a topic that has grown in importance in recent years, particularly, as the author says, when "analysed from a gendered perspective". Ungerson argues persuasively that the growing number of older people, the desire to reduce public expenditure and pressure from groups of users and carers mean that payments for care are likely to become even more significant across Europe. One clear consequence of this development is that the boundaries between formal and informal care are being eroded. Gendered assumptions are built into these developments and their impact. Systems of payment amount to a commodification of the caring relationship.

## 14. Current trends and policy issues; predictions

Kautto, M. (ed.) 1997. *European Social Services: Policies and Priorities to the Year 2000*. Helsinki: Stakes.

These are the proceedings of an expert meeting held in 1997. The title of the meeting and the book mention the year 2000, but the policies and priorities discussed are relevant well beyond. Here the term social services refers to the personal social services, adopting the same definition of the personal social services currently used in the UK. The meeting began with the premise that demand for social care services was expanding in all West European welfare states and this expansion was accompanied by funding crisis. Two major issues addressed at the meeting were financial constraint and social exclusion. One of the papers in the collection questions both the need and the wisdom of simply cutting expenditure. The book concludes with a paper that looks at the prospects for European social services.

Ginsburg, N. 1994. „Agendas and Prognoses for Social Policy: A Selective Review.“ Pp. 58-79. In R. Page and J. Baldock (eds.) *Social Policy Review 6*. London: the Social Policy Association.

Hughes, G. (ed.) 1998. *Imagining Welfare Futures*. London: Routledge

Jordan, B. 1998. *The New Politics of Welfare: Social Justice in a Global Context*. London: Sage.

The above three publications address broad developments in welfare states.

## 15. Other topics

Craig, G. and Manthorpe, J. 1999. *Unfinished Business: Local Government Reorganisation and Social Services*. Bristol: the Policy Press.

In the 1980s and early 1990s central government made successive attempts to reduce local government expenditure and resources and to limit local authority powers. Somewhat paradoxically, responsibilities and duties were expanded, notably by the 1989 Children Act and the 1990 NHS and Community Care Act. Social services departments have since undergone further disruption by local government reorganisation. Between 1995 and 1998 over a hundred local authorities – all those in Wales and Scotland and more than a third in England – were reorganised. This has had profound consequences for social services departments. This book is a study of the process and the outcomes of this reorganisation, suggesting, as the title indicates, that a number of key questions remain unresolved. The book also looks at issues such as the management of social services, the public/private welfare mix, inter-agency relationships, inter-authority working and the general issue of local governance.

## C. Special Fields

### Child and youth welfare

Becker, S., Aldridge, J. and Dearden, C. 1998. *Young Carers and their Families*. Oxford: Blackwell.

Interest in young carers emerged in the late 1980s. This book, a research-based study, is the first comprehensive text on children and young people under the age of 18 who provide care for an ill or disabled parent or relative, usually within their own home. It is of direct use to professionals involved with young carers, offering guidance on the implementation of policies that offer the best possible support. It discusses the needs and rights of young carers and the impact of caring on children's health and development and on family relationships. Good use is made of case studies to illustrate the experience of young carers. The book is international in perspective.

Garrett, D., Riche, J. and Tucker, S. (eds.) 1996. *Changing Experiences of Youth*. London: Sage.

Roche, J. and Tucker, S. (eds.) 1996. *Youth in Society: Contemporary Theory, Policy and Practice*. London: Sage.

These two books share the same editors and are essentially complementary. The first looks at the diverse experiences of youth in a multicultural society and of those who work with them. A wide range of topics is considered, including young people's lives and the services provided for them. The second book is a critical overview of debates concerning young people in the UK. Together the two books present a very wide range of topics and make excellent source books.

Hayden, C., Goddard, J., Gorin, S. and Van Der Spek, N. 1999. *State Child Care Practice. Looking After Children?* London: Jessica Kingsley.

This book provides up-to-date and thorough assessment of the current state of provision for children being cared for by the state in residential or foster care at a time when both forms of 'corporate parenting' are undergoing significant reassessment. The authors analyse the impact of the 1989 Children Act and address current concerns and issues for the child care system, including: admission and placement; developments in foster care; the education of looked after children; leaving care; training support and service quality; and approaches for involving young people in decision-making. The views of all those involved in the system, including children themselves, are incorporated into the analysis.

Parton, N., Thorpe, D. and Wattam, C. (1997) *Child Protection, Risk and the Moral Order*. Basingstoke: Macmillan.

Drawing on original research, this text provides a major intellectual challenge to contemporary child protection research, policy and practice in England and Wales.

In the face of apparent consensus surrounding the meaning of 'child protection' and 'child abuse', the text argues for the importance and implications of accepting the socially constructed nature of these concepts. The authors critically examine current policy attempts to reconstruct the balance between family support and child protection, and effectively demonstrate how the notion of risk has become central to both policy formation and practical decision-making. Specific chapters examine how social workers identify risk, how children are constructed in child protection records and the outcomes of cases of alleged sexual abuse. The text concludes by engaging with a range of debates taking place internationally regarding the future direction of policy and practice in child protection.

Sanders, R. (1999) *The Management of Child Protection Services*. Aldershot: Ashgate Publishing Ltd.

This book provides the most up-to date analysis of the systems, structures and dilemmas that characterise the child protection process in England and Wales. Its subject is not child abuse, but rather the arrangements made by professionals from a wide range of disciplines to ensure they operate effectively together. The text begins with a detailed description of the historical development of child protection services in Britain compared with North America, Europe and the rest of the world. The contemporary structural and policy context of child protection is then considered, with attention to the role of the media and public opinion and the impact of central and local government. In addition to a detailed description of policy and process, the text aims to address the central question regarding the extent universal standards can be applied to protect all groups of vulnerable children.

The Violence against Children Study Group. (1999) *Children, Child Abuse and Child Protection: Placing Children Centrally*. Chichester: John Wiley and Sons.

This challenging text comprises a collection of research-based essays on a range of key issues surrounding the lives of children growing up with their own parents or with 'corporate' parents. The thirteen chapters by experienced contributors cover a wide range of important policy and practice issues including: the protection of black children, the experience of young carers, children and domestic violence, life in state care, young abusers, links with mothering, domestic violence and elder abuse. Considerable attention is given to the views and experiences of children and young people themselves, and central emphasis is placed on issues of race and gender.

## Family services

Hill, M., (Ed.). (1999). *Effective Ways of Working with Children and their Families*. London: Jessica Kingsley.

This comprehensive collection of essays by contributors from psychology,

social work, psychiatry, education and family mediation, examines the latest evidence about the most successful ways of working with children and families. Fourteen chapters cover a wide range of services and approaches including early-years provision, community work with children, family therapy, treatment for children who have been sexually abused and work with foster children and their families. Certain approaches focus on individual children, others on their families, while some aim to influence children's lives at school, neighbourhood and community levels. After outlining the nature and principles behind the various forms of intervention, each chapter reviews evidence relating to effectiveness and draws out implications for those working with children and their families.

Lupton, C. and Nixon, P. (1999) *Empowering Practice?: A Critical Evaluation of the Family Group Conference Approach*. Bristol: Policy Press.

Family group conferences (FGCs) are being developed in Britain and elsewhere as an empowering way for professionals to work with families. Much has been claimed for the approach, but there has been little dispassionate assessment of its operation in practice. This text describes the development of child welfare FGCs in England and Wales and provides a comprehensive examination of the available research evidence on their impact. Key chapters discuss some of the conceptual difficulties surrounding the idea of empowerment, including the limitations of professionally-led empowerment, and examine the methodological issues raised in evaluating its outcomes. The text concludes that the approach may provide a more enabling process, but more research evidence is needed on the longer-term impact of family group decision-making, particularly for child protection. Interestingly, the book includes international perspectives and discusses the pioneering work in New Zealand.

## **Frail elderly, nursing homes, long-term care**

Glendinning, C. (Ed). 1999. *Rights and Realities: Comparing New Developments in Long-term Care for Older People*. Bristol: The Policy Press.

All advanced industrial societies are experiencing an increasing number and proportion of older people, particularly the very elderly and frail. At the same time, there are political demands to limit increases in social expenditure. These pressures threaten the ability of publicly funded services to maintain even current levels. This collection of papers examines the experience of seven countries that have recently made changes to the funding, organisation or delivery of health and social welfare services. An excellent introductory chapter by Glendinning looks at new developments and shifting responsibilities for health and social care services for frail older people in the UK.

Jack, R. (ed.) 1998. *Residential Versus Community Care: The Role of Institutions in Welfare Provision*. Basingstoke: Macmillan.

This book discusses the role of residential care in welfare provision. In government and academic circles institutions have been out of favour while the long-standing emphasis on community care, recently intensified, has led to the closure of institutions. This book questions the reasons for the rejection of institutional care and re-assesses its role in community care. The book covers a wide range of institutions including psychiatric hospitals, prisons, residential homes and nursing homes. It clearly goes beyond the confines of personal social services, but other kinds of institutions have something to offer those with interests in social care. Of general interest are chapters identifying the circumstances in which institutions succeed and those in which they fail.

Peace, S. M., Kellahar, L. and Willcocks, D. 1997. *Re-evaluating Residential Care*. Buckingham: Open University Press.

This publication addresses an apparent paradox. Most older people express a preference for remaining in their own homes, but residential care homes provide accommodation for over 300,000 older people in the UK, many supported by local authorities. The authors analyse factors that lead older people to give up their homes. The book provides a brief history of residential care, examine its current provision and practice and analyse its future role. Among the issues discussed are: (i) the tension between care and control and (ii) the relationship between the market and the state and the new shape of residential care.

Tinker, A. 1997. *Older People in Modern Society*, Fourth Edition. Harlow: Longman

In its fourth edition since 1981, this book has become a standard work on the personal social services although it also addresses other policy areas. It contains a great deal of information on social care provided by social services departments, voluntary and community organisations and families. It brings together research, policy and practice relating to older people, and incorporates the changes resulting from the implementation of the NHS and Community Care Act. An important feature of the book is its emphasis on the social contribution of older people, including their roles in the family. The book provides a comprehensive, fully referenced and well-written overview.

## **Mental illness and learning disabilities**

Booth, W. and Booth, T. 1998. *Advocacy for Parents with Learning Difficulties*. Brighton: Pavilion Publishing.

Walker, C. and Walker, A. 1998. *Uncertain Futures: People with Learning Difficulties and Their Ageing Family Carers*. Brighton: Pavilion Publishing.

These two reports focus on people with learning difficulties and their families. Whereas the first is concerned with parents who themselves have learning difficulties, the second is about people with learning difficulties who continue to live with their ageing parents. The report by Booth and Booth describes and evaluates the work of "Parents Together", an advocacy support group for parents with learning difficulties. The conclusion is that advocacy can prevent bad practice and insufficient support from exacerbating the problems already experienced by parents with learning difficulties, but it cannot relieve environmental pressures. The report by Walker and Walker analyses research policy and practice relating to services for adults with learning difficulties living at home with older family carers. Among all concerned there is broad agreement about what is wrong and what is required. The authors urge swift action to provide the necessary support and planning in order to replace uncertain futures with increased security and peace of mind.

Kitwood, T. 1997. *Dementia Reconsidered: The Person Comes First*. Buckingham: Open University Press.

This book won the Age Concern Book of the Year Award in 1998 in recognition of its path-breaking nature. Many older theories of dementia are subject to radical criticism and reappraisal by drawing on research evidence, analysis of existing knowledge and the author's own experience. The central theme of the book is the personhood of those who have dementia – a principle very often absent in the traditional health and social care services. The book identifies the nature of dementia and the ways it is experienced, and suggests an agenda for care practice and the transformation of the culture of care.

Watson, L. 1999. *Not Mad, Bad or Young Enough: Helping Homeless People with Mental Health Problems*. Bristol: The Policy Press.

Do mental health problems precipitate homelessness among young people or is lack of somewhere to live the cause of mental health problems? As with most 'chicken and egg' problems there is no clear-cut answer to this question. However, research by the Mental Health Foundation has established that young people experience mental health problems before becoming homeless and that homelessness was not necessarily the cause of their problems. The research also emphasised the importance for housing and mental health sectors to work closely together. This short report examines three projects adopting different approaches to the development of collaborative work.

## Disability

Chamba, R., Ahmad, R., Hirst, M., Lawton, D. and Beresford, B. 1999. *On the Edge: Minority Ethnic Families Caring for a Severely Disabled Child*. Bristol: The Policy Press.

This publication presents findings from the first national survey of the needs and circumstances of minority ethnic families caring for a severely disabled child. Almost 600 families took part in the survey, which was compared to an earlier survey of white families. It is clear that considerable inequality remains in access to social and health services. After a brief introduction the report describes the circumstances in which the families were living, followed by an interesting discussion of knowing and being understood. Equally interesting is analysis of parents' experiences of using services. The report concludes with a summary of the implications for policy and practice.

Marks, D. 1999. *Disability: Controversial Debates and Psychosocial Perspectives*. London: Routledge.

Marks provides an up-to date account of the major debates surrounding disability, emphasising the historical and cultural construction of disability. The chapters on the 'disability professions' and on public policy contain the most direct references to the personal social services, but the book as a whole has relevance for social work practice. There is a chapter on The Disabled People's Movement, and the relationship between the Movement and professionals is of crucial importance. The book ends with a discussion of knowledge and the politics of disability.

Morris, J. 1999. *Hurting into the Void: Transition to Adulthood for Young Disabled People with Complex Health and Support Needs*. Brighton: Pavilion Publishing.

The void referred to in the title to this book is one of uncertainty and inadequate support. It arises as increasing numbers of young people with a range of impairments and high levels of health and support needs survive into adulthood, while knowledge about the group in question is insufficient. This report reviews the present level of research knowledge and summarises information from six health and social services authorities as well as the views and experiences of sixteen young people with complex needs. One main aim is to identify key questions for those commissioning and providing services, in order to enable them to more effectively help young people make a successful transition to adulthood.

Oliver, M. and Sapey, B. 1999. *Social Work with Disabled People*, Second Edition. Basingstoke: Macmillan.

The first edition of this book appeared in 1983. This edition incorporates substantial revisions taking into account legislative changes and theoretical developments in the field of disability. The causes of impairment are contrasted with the social creation of disability. The book provides chapters on disability in the family and liv-

ing with disability. It identifies some of the negative aspects of welfare policy, but also considers how social work can help remove disabling barriers. It also considers the implications of adopting anti-disablist practice in the education and training of social workers and the management of social services departments.

## Homeless, poverty, social exclusion

Barry, M. and Hallett, C. (eds.) 1998. *Social Exclusion and Social Work: Issues of Theory, Policy and Practice*. Lyme Regis: Russell House Publishing.

This volume considers the definition, causes, processes and outcomes of social exclusion. It draws on a wide range of theories to illuminate and inform discussion of issues such as citizenship, empowerment, discrimination and poverty. It is not perhaps unreasonable to ask whether social welfare and social work exacerbate rather than reduce the exclusion of marginalised groups. The contributors to this volume are aware of this possibility but the overall message of this publication is that social work has a significant role to play in combatting social exclusion. Social work mediates between advantage and disadvantage and between social integration and marginalisation. However, contributors are not entirely satisfied that social work is realising its full potential in this respect, nor do they claim social work alone can overcome structural disadvantages associated with a market economy.

Becker, S. 1997. *Responding to Poverty: The Politics of Cash and Care*. London: Longman.

This book differs from others with similar titles in that it has considerably more to say about the personal social services. Policy-making and implementation are analysed in three key areas: social security, personal social services and community care. An interesting feature of the book is the interplay between these three areas – the relationship between cash and care. The chapter dealing with the personal social services, entitled *Managing Care*, focuses on social services and social work with poor families and children. The chapter on community care considers the role of social services in relation to social exclusion. The whole analysis is set within the context of a discussion of the politics and ideology of poverty.

Burrows, R., Pleace, N. and Quilgars, D. (eds.) 1997. *Homelessness and Social Policy*. London: Routledge.

In this very useful and accessible book the editors draw on research conducted at the Centre for Housing Policy at the University of York. The introductory chapter discusses the various meanings of homelessness and the extent and distribution of homelessness. There is a good chapter on alternative theoretical perspectives. Among the aspects of homelessness discussed in the book are homelessness and the law; the social distribution of homelessness; mortgage arrears and repossession; health issues; the rehousing of single homeless people; the needs of home-

less households; and the role of the private rented sector. The authors call for a more integrated approach and for more resources.

Crane, M. 1999. *Understanding Older Homeless People: Their Circumstances, Problems and Needs*. Buckingham: Open University Press.

Homelessness among older people is a neglected subject, despite the significant proportion of the homeless who are older people. Crane addresses this gap, drawing on original research involving the collection and analysis of life histories of homeless older people, tracing their pathways into homelessness. Since many older people have been homeless since their teenage years or early adulthood, the research has relevance for homelessness occurring at various stages of the life cycle. Using case studies as illustrations, the author discusses the circumstances, problems and needs of older homeless people and examines how agencies respond. The author makes recommendations for improving services.

Rugg, J. (ed.) 1999. *Young People, Housing and Social Policy*. London: Routledge. This book presents original research in this area. It explores young people's early housing histories in relation to government policy initiatives. The book offers a critique of housing policy as it affects young people. Most of the book has relevance for personal social services, its greatest relevance being in those parts dealing with young people leaving care, young people in the parental home, youth homelessness, and young single parent families.

## Domestic violence

Mullender, A. 1996. *Rethinking Domestic Violence: The Social Work and Probation Response*. London: Routledge.

Mullender's welcome book reviews practices in both social work and probation. Women's experiences form a significant part of the analysis. Considerable emphasis is also placed on the impact of domestic violence on children and the connections between child protection and domestic violence against women. Although the difficulty of professional workers' task is appreciated, their response is criticised on several grounds. Only a minority of women expressed any degree of satisfaction with their treatment. The social work response has focused primarily on the protection of children, whereas probation has been mainly concerned with offenders. There are, however, some examples of good practice and these are identified. The implications for the future are also spelt out in this admirably thorough book.

Goldsock, L. and Radford, J. 1999. *Feminist Perspectives on Domestic Violence*. London: Longman.

Goldsock and Radford pack a good deal into a relatively short book. They explore

the nature, extent and impact of domestic violence, and consider the responses of civil and criminal law, police and social workers. They describe ways domestic violence been defined as a problem and the influence of the women's movement in this process, and also examine inter-agency approaches and programmes for perpetrators. Finally, the necessity for greater public education is discussed and possible ways forward are proposed.

## AIDS

Watney, S. 1999. *Imagine Hope: AIDS and Gay Identity*. London: Routledge.

This is one of an important new series on the social aspects of AIDS edited by Peter Aggleton. The series is certainly needed to counter-balance the heavy health services/medical emphasis of much of the work in the area. Watney is among the most prolific writers with a non-medical approach to AIDS. This is a collection of some of his published work with a new contextualising introduction and a new conclusion. The author examines the major debates about policy and implementation. He also addresses what he considers the inseparable issue of the representation of AIDS and cultural responses to it. The writing demonstrates Watney's deep commitment and benefits from his position as Director of the Red Hot AIDS Charitable Trust.

Aggleton, P., Hart, G. and Davies, P. 1999. *Families and Communities Responding to AIDS*. London: Routledge.

Another book in the social aspects of AIDS series which claims with some justification to be the first comprehensive book on care and support networks for AIDS sufferers. Families and communities are the main providers, but they also have the capacity to stigmatise their members. An interesting aspect of the book is that it looks at care and support networks in a wide variety of settings: nuclear, extended and refugee family households, and gay community networks and structures. Using this broad approach enables the authors to suggest factors leading to positive responses and those resulting in negative responses.

## Immigrants and refugees

Means, R. and Sangster, A. 1998. *In Search of a Home*. Bristol: The Policy Press. This is an evaluative study of the work of refugee housing advice and development personnel. The report identifies the main housing problems facing refugees and considers the response of housing workers to them. The authors consider the degree of success in changing policy and practice in local authorities and other key agencies, and the extent that workers believe their efforts are being frustrated by the national policy environment. The housing implications of changes in

the asylum law are also considered. The authors make recommendations for refugee community groups and statutory agencies.

Zetter, R. and Martyn, P. 1999. *Managing to Survive: Asylum Seekers, Refugees and Access to Social Housing*. Bristol: The Policy Press.

If refugees are to settle effectively adequate housing is crucial. According to the publishers this book is “the first in-depth, nationally-based study of social housing provision for asylum seekers and refugees”. The authors judge that the disentanglement legislation and policies implemented by the Conservative government have had a chaotic impact. They consider the likely impact of the present government’s policy review. The report examines the differing frameworks of housing service providers, local authority policies and community networks, and emphasises the importance of partnerships.

#### **D. Summary assessment of current debates**

Current debates on general issues affecting the personal social services include the following, in addition to more specific issues relating to services for particular client groups. (1) The quality of service provision: inspection, target-setting and the use of performance indicators. This debate includes a broad discussion of how outputs are measured. The recent White Paper, *Modernising Social Services*, suggests greater central government intervention in target-setting and measuring performance. (2) Participation and the empowerment of users and carers. (3) Social exclusion issues, sometimes tied to debates about racism and gender. (4) Partnership, one of the most frequently used words in the social policy discourse, includes partnership between (i) different departments in the local authority – e.g. involving social services departments, education departments and housing departments; (ii) local authorities and health authorities; (iii) local authorities, the voluntary sector and business; involving users and carers. (5) Resources, in particular charging policies. (6) A continuing debate about the mixed economy of welfare and social care markets.

# **Social Services in Europe: Policy Issues and Current Debates**

*By Lisa Alfredson*

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Social policies and social service delivery and finance systems in Europe are undergoing far-reaching changes and facing major challenges – triggered by demographic, social, political and economic trends. Unfortunately, cross-national understanding of social service systems in Europe, and the policy implications they entail, remains very incomplete. While comparative research on social services in various European countries has a long tradition, research at the European level remains all too rare and continues to be frustrated by the lack of systematic and comparative information. As discussed in the introductory chapter to this volume, there is great need for European level information systems on social services.

Against this background, the annotated bibliography presented in this volume served as an initial step toward greater understanding of social service systems, specifically in current European Union member states. Succinct summaries of some of the core works in the field were offered on a country by country basis, covering a range of social service fields and topics. What are some of the issues and implications that can be drawn from the various country chapters? Are there common themes that can be identified, and what do the chapters imply for the need to develop a comparative information system? We turn to these questions in the concluding chapter of this book.

## **Definitions and types of social services in the EU**

Taken together, the synopses of social service systems presented in this volume paint a picture of the changing landscape of social services systems throughout the EU member states, and some of their dominant similarities and differences. The country-specific annotated bibliographies and summary assessments of current debates offer insights into the many issues that would benefit from greater cross-national information and research, as well as the present in-roads and future potential for such research.

Definitions of ‘social services’ vary across countries and sometimes within them. Indeed the lack of a common definition, seen for example in the chapters on Austria, Germany, Greece and Portugal, could be seen as a major handicap for comparative work. However, the common usage of terms or phrases with much the same meaning came up frequently, and we can detect strikingly similar

trends in social service system developments across countries.

The term 'personal social services' was defined in the introductory chapter to this volume as involving an exchange of tangible services by a third party to the benefit of a user or client. Services may be delivered and financed by public, non-profit and for-profit organisations as well as individuals (see Anheier, chapter 1). Many authors of the country-chapters referred to this term and to 'social services' more generally to describe similar concepts in non-Anglophone countries, which translate more literally into English as (for example) 'social action', 'social activation', 'social work', 'social aid' and 'proximity services'. At the same time such terms were often contrasted with the terms 'social assistance', 'social insurance' and 'social protection', invoking a subtle but important distinction. The former refer specifically to the provision of tangible services; the latter refer to direct cash transactions to beneficiaries, or to broader welfare systems encompassing these transactions.

Despite the prevalence of this distinction it is important to note that some country chapters reported significant difficulty separating cash from in-kind welfare benefits and systems in currently available documentation and research, for example in Belgium, Finland and Luxembourg. In these cases in particular and in many of the others, authors defined social services in terms of general characteristics and overarching aims of the social welfare system – most commonly the eradication of social exclusion and the promotion of equality, participation and well-being in society, with services usually targeting the most vulnerable groups.

Less commonly social services were also defined in terms of social rights, reflecting a significant point of contention within and across states. Nordic countries with their traditionally more universalistic welfare systems were most explicit and decided about defining social services as social rights. Perhaps not surprisingly it also appeared most explicitly in countries with the most recently developed 'welfare states', such as Spain, Portugal and Italy, although typically in current debates about future definitions. And in those that did not define social services in terms of rights, like those that did, the inter-related issues of social rights, citizenship and EU membership emerged in references to core works on social services, reflecting both historical and new debates and their growing importance in the context of increasing globalisation and EU integration.

Most commonly, definitions of social services in different countries produced a list of general social service categories, by beneficiary groups: unemployed, elderly, disabled (mentally, physically and learning disabled), ill, children and youths, families, and socially excluded groups or populations at risk such as ethnic minorities, immigrants and refugees, the homeless and substance abusers. In some cases forms of service provision for overlapping target groups were also

delineated, typically home care and institutional care, and employment, social integration, health-related and housing programs. Finally, the various social services were commonly discussed as involving a mix of public, nonprofit and for-profit organisations, and often also included the informal care provided by family, friends and community members. Thus while the search for a common definition of social services in the EU will likely entail a good deal of debate and further investigation in the future, the common parameters and significant dimensions emerging in this volume should provide a useful starting point.

## **Comparing social service systems in the EU**

While for the most part the list of social services categorised in each country is strikingly similar and corresponds closely to the proposed definition of personal social services, the degree and quality of coverage actually implemented across countries seem much harder to gauge. As expected, all EU countries report significant expansion in demands for social services and in number and types of services offered. However the unevenness of reference material in many subject categories across the country-specific bibliographies denotes both a lack of information necessary for comparing degree and quality of coverage for beneficiaries, and potentially also some real differences in actual coverage. The question of implementation relates directly to the need for a closer comparison of the means of coverage – by whom, in what forms, and how financed?

Looking to existing cross-national research and issues relating to globalisation and EU membership – themes covered in most of the country bibliographies – we see that works cited tend to focus on the comparison of services for more narrowly defined client groups and social problems (elderly populations, the unemployed, etc.). But overall the need for research on a greater range of common social issues remains pressing, as does the need for broader comparison of social service systems as a whole. Toward this end greater awareness of the state of information currently available in different countries is essential. The country reports and annotated bibliographies provide a starting point, revealing much comparable work which researchers may turn to, as well as gaps in and across country-specific literature.

Regarding existing national research, authors of the country chapters described significant changes in the financing, provision, and types of social services offered over the last two decades. This raises important questions for research, some of which is already underway. What is the nature of these changes, and how do they alter the ways we understand different social service systems? What are the similarities and differences between social service systems in countries of the EU? Are they moving inevitably toward harmonisation and a more integrated EU? How might they be better co-ordinated at EU level?

A good starting point for considering such questions is Esping-Andersen's (1990) "three worlds of welfare capitalism", likely the most widely used and influential welfare classification system. The 'three worlds' refer to the corporatist model (e.g., France, Germany, Italy), the neo-liberalist model (e.g., the UK), and the social-democratic model (e.g., the Scandinavian countries). But when social services systems today are considered apart from monetary social assistance systems (pensions, social security, minimum income guarantee, etc.), as in this volume, the distinctions between models are less clear.

Across the EU member states both the provision and financing of social services have become increasingly 'mixed' and decentralised in nature, while offering a greater range of targeted coverage. This significant shift has been overtaking corporatist systems, such as those of France, Germany and Austria, as well as the more universalist social-democratic systems of Finland, Denmark and Sweden, and of course neo-liberalist systems already headed in that direction. And it is overtaking older and more recently developed welfare states alike. In Southern Europe, family networks and informal care remained for far longer the most important dimension of the 'social service system' compared to other EU countries. While these countries see an increase in state funding and universal social assistance within developing, decentralised systems, those with older formal social welfare systems see decentralisation of state provision and the solidification of targeted social rights in legislation. At the same time many countries – particularly the UK, Ireland, Finland, the Netherlands and Sweden – are increasingly returning to 'informal' social service providers by explicitly seeking to promote self-help initiatives, family and community networks. Client empowerment, client-oriented services, and self-help or self-organised initiatives are key themes in these countries and in growing debates about quality of services more generally.

Thus all EU countries have been in a process of transition, re-negotiating welfare responsibilities and experimenting with various types of provision and relations between providers which – although taking different starting points and measures – seem ultimately to point in a similar direction. All are exploring alternatives and innovations that typically involve nonprofit and forprofit providers at a local level, improving upon group-targeted legislation and measures (for example employment programs for the disabled), and expanding the number and types of social services offered overall. Subsequently, they seem to be moving toward an increasingly similar model of social service systems, albeit within the context of different labour market policies and more and less universalist welfare approaches at different stages of development.

However the exact mix of service financing and provision and the total size of the

personal social services economy varies from country to country, and in some cases exact figures are hard to come by. Social and economic indicators of social services are often either lacking or disaggregated by particular services or country regions, or do not differentiate cash from in-kind benefits when estimating total size. But according to the country reports, quantitative and qualitative information available clearly indicate that the growth in overall size of the social services sector has been accompanied by several overarching trends.

With the decentralisation of services and subsequent expansion of nongovernment social service providers, the role of nonprofit organisations in particular has grown through contractual relations or ‘partnerships’ with governments. Increased funding has helped to stabilise and promote their traditional role in ‘charity work’. Forprofit organisations also supply an increasing proportion of social services, although currently far less than nonprofits. In fact, *in the majority of EU countries nonprofit providers now dominate personal social service provision*; in many service areas and forms of services (particularly home care) nonprofits account for between 60 and 80 percent of provision. In countries with fewer nonprofit social service providers, such as Denmark and Finland, criticism of state-centred ‘paternalistic’ models and calls for civil society and solidarity enhancing initiatives, through greater use of nonprofit social service organisations, are strong in current debates.

While service provision has decentralised, *the state generally remains the largest financial contributor to social services*. This emerges in the fact that across the EU, public funds not only pay for state-run services but often account for a large proportion if not the majority of nonprofit service organisation funding, while the number of forprofit service organisations (financed through user fees), although growing, remains comparatively small. In addition states may provide fiscal transfers for individuals to purchase social services themselves. EU social funds also account for a significant proportion of funding in particular service areas in some countries, but this source not been consistently documented or compared to other sources in the country reports in this volume.

In addition to public funds, *social service financing is also being supplemented with the private earnings of social service providers themselves: fees, dues, donations and investments*. The growing reliance on user fees is significant as it includes not only forprofits but also nonprofit social service organisations (albeit to lesser extent). In some countries these supplementary resources remain relatively small; in others they account for nearly half of resources in particular service delivery areas, most often for the elderly (for example in France) where user fees increasingly compensate for over-demand and under-supply. However the marketisation of social services is widely debated, and it is not entirely clear how far or in what forms this trend will continue.

Across these common trends in 'mixed' social service systems is wide variation of regulatory structures. In some countries social rights are guaranteed in national level legislation (e.g., the Netherlands, Finland, Luxembourg, Portugal), which increasingly prescribes frameworks for regional and local social service provision. In others social rights are predominantly legislated at regional and local levels where services are actually provided and monitored (e.g., Belgium, Denmark, France, Spain). Within countries there is also fragmentation, with different types of social rights legislated at different levels (e.g., in Greece, Italy, Germany). It is evident that more work and research is necessary in order to better understand and harmonise social policies and services at the national level, as the chapters on Spain and Italy emphasised, and also to document the effects of European social funds and harmonisation guidelines in country and culture specific contexts, as the chapter on Portugal observed. There is also great need for research, co-ordination and planning to regulate social service evaluation across the different social service fields, nationally and internationally.

Not surprisingly, many of the challenges arising from the subsidiarity principle within countries parallels those posed by the subsidiarity principle at the EU level – namely the challenges of responsibility, accountability and equity within fragmented regulatory and implementation structures. Fragmentation at both national and EU levels can mean inequity in rights, service access, implementation and regulation in different regions or countries and among different client groups. With increasing EU integration it also raises the problem of social-service 'free-riders' – i.e. non-residents or recent immigrants taking advantage of services paid for through local taxation, in countries offering greater services or rights.

The growing number of private social service organisations pose one alternative to social service free-riding, instead attracting consumers willing to pay for competitive services and thereby contribute to national economies. But the marketisation of social services also highlights inequity – making access more a question of class while less of a burden on states. A more common answer, the continuing growth of EU level social policies and harmonisation guidelines, has evoked fears of an erosion of state sovereignty (see Liebfried and Pierson, 1999). This may heighten a process already underway, as central governments' control over social service systems weakens in some respects under decentralisation schemes. The subsidiarity principle promises both a degree of freedom from responsibility with a measure of control, and more outright loss of authority. To deal with EU level challenges, social service systems still need to be better understood and co-ordinated at the national level, to enable the comparison of different structural arrangements and the development of policies to address cross-national issues.

## **Current debates about social services in the EU**

EU member states face many similar problems, raising similar debates and questions about how they might be handled and about the future of social welfare more broadly. As discussed thus far, it is evident that cutting across common trends in social service systems are differences of degree and emphasis, as well as monitoring and evaluation. Similarly, not all current debates have resulted in an equal amount of academic attention in each country. But the presence of similar debates is an important indicator of the directions and needs for future research and the further development of a European information system on social services.

The movement out of traditional welfare institutions and into smaller, local settings is a crucial part of mixed social service systems which most of the country-chapter authors have described as a positive trend rather than simply a symptom of state withdrawal and budgetary cutback in social services. Indeed, over the past two decades personal social services have grown in types of services offered, client populations and needs covered, as well as total social service expenditure. However, one of the most prominent debates today unquestionably concerns the public/private partnership, and this debate maintains healthy reservations regarding the implications of changes that in fact are commonly described as arising out of 'welfare state crisis'. The chapter on Germany for example expresses particularly strong reservations regarding the current 'rolling back' of the welfare state.

The partnership model raises other concerns including the extent of state accountability versus that of nongovernment organisations within a system of increasing provision by the latter. For example the chapter on Sweden observed the emergence of scandals in private forprofit provision of elderly care. Others questioned state accountability in enabling nongovernment providers to investigate and determine appropriate interventions in sensitive fields such as child protection, while the proportion of people employed in social services without professional social work qualifications rises. Frequently criticised was also the current lack of monitoring and evaluation mechanisms in nongovernment social service organisations to whom responsibility for provision is transferred. It was also asked whether the state is accountable for failing to identify or act on emerging social needs which nonprofit providers (to whom this responsibility is passed) neglect or are unable to address.

On the other hand, contracting-out and privatisation increasingly appear as necessary solutions to increasing demands for social services within changing demographic conditions and continuous structural unemployment. In this context the

role of informal providers (i.e. family, friends) is also debated, with some countries moving away from strong traditions of informal provision and others returning to a more active policy line that promotes it along with other self-help initiatives.

Also inherently tied to the evolving public-private welfare mix are prominent debates on the need to develop adequate *measures* of service quality and thus to ensure and improve services. With the reshuffling of responsibilities and increasing competition between providers, it is not always clear just how standards are to be set, by whom, or who is to enforce them. In addition, the increasing number of forprofit services and the increasing reliance on user fees in nonprofit services both pose different challenges for regulation and threaten the precarious link between quality and *equity* of service provision in market driven systems.

Quality debates apply to all social service areas but have become particularly prominent in fields where over-demand poses the greatest challenges, as in care for the elderly in a quickly and disproportionately ageing Europe. Research into monitoring the quality, efficiency and effectiveness of social services financing and provision seems to be occurring field by field and in relation to demand. As the issue gains attention, the marked absence of research to monitor and evaluate social services provision is highlighted.

The heightened call to explore and improve quality, efficiency and effectiveness of social services in virtually all the country reports also raises several other debates. One area concerns employment in social services: needs for greater professionalisation among both paid and voluntary workers, improved methods of staff recruitment and retention, and greater attention to the implications of promoting informal social service work which tends to be done by women.

A second area of concern is the current lack of co-ordination in the regulation and delivery of social services. Ways of improving co-ordination and co-operation across providers, country populations and programs are currently under debate on a national level, and are increasingly becoming European level issues. Social problems themselves are complex and integrated and require more than partial solutions. A more holistic view of social problems and social service systems might involve, for example, addressing over-demand for services by the elderly through a long-term approach involving the strengthening of social policies that target children and families, as observed in the chapter on Finland. Other countries have noted the pressing need for national harmonisation of fragmented social welfare legislation to improve co-ordination. A system that recognises and makes the most of its many interdependent parts – both in overlapping social fields and in ways of addressing them across professional fields that could be mutually supportive – will be an increasing necessity in an integrated European

Union. Greater research into co-ordination of services is needed, as pointed out in almost all the country chapters, which again inherently entails working out and refining the developing 'mix' of social service systems.

A third area of importance in debates on quality is innovation. There is great potential and need for cross-national learning from the evolving responses of EU member states to similar social problems, such as innovative approaches to dealing with social exclusion, promoting participation, and strengthening client-oriented approaches and client rights. A positive example of research into innovations is work describing over two hundred 'trend-setting projects' in care services in the Netherlands (de Groot, Ketelaars, and Maaskant, 1999).

The current attention to furthering self-help initiatives, family and community networks of informal social services is also an important area of debate. It is claimed such initiatives aim to promote participation and community development and subsequently to strengthen civil society and social solidarity. However, such initiatives can not simply be juxtaposed against what is described as the paternalism of the welfare state. Thus increasingly heard across countries is a call for more client-oriented service delivery systems (e.g., improving client participation in the design, monitoring and evaluation of formal social services), and subsequently, stronger client rights. Such developments touch upon the foundations of a 'right to welfare' and the grounds for defining beneficiaries, raising issues of citizenship, EU membership and even human rights.

Thus debate about right to welfare is not only at issue for various client groups in specific countries, but also has particular import for issues of EU membership and harmonisation, and the need to negotiate country-specific characteristics and responsibilities in social services. Debating which services are 'rights', and how to ensure sufficient financial resources and delivery systems to support them, will involve negotiating the public-nonprofit-forprofit mix at both national and European levels. The effects of globalisation and the Europeanisation of social rights were discussed as an emerging topic in all the country reports. But right to welfare at the EU level has thus far received little attention compared to other issues concerning particular target groups and specific national social service systems.

Similarly a broader understanding of access to welfare – fundamental to the fulfilment of rights – is needed at the EU level; for example the importance of the concept of social exclusion, which is prominent in current debates to explain degree of *access* to social services and social integration, is neglected in cross-national comparisons. Overall, differences and disparities in guaranteed rights, the degree to which the range of client groups are targeted or actually benefit from social policies in each country, and emerging innovations in the field all

need to be compared cross-nationally. And the very basis for social rights, their form and regulation, will require greater thought at a European level as well as the continuing evolution of cross-national information systems for that purpose.

## The state of information systems

To a great extent the future of social welfare systems in the EU depends on how member states individually respond to social problems and changing social conditions, but also on whether they will *learn* from one another in their experimentation and co-operate in common efforts. To this end, the research and documentation of social services systems is fundamental not only for individual countries but also for cross-national research and learning. By following a common structure the annotated bibliographies in each country chapter highlight both a great deal of common research as well as various degrees of emphasis on (or neglect of) research into specific topics. Thus this volume, together with the following index, reveals great scope for cross-country comparisons and learning and provides researchers a useful tool in this endeavour. In the very least it should raise questions regarding topics that may be under-researched and increase interest in them by future researchers, and ultimately, by aiding research, enable better policy-making and implementation.

Common debates across countries provide important avenues and directions for greater cross-national research as we attempt to address changing social conditions and problems, and to negotiate and improve developing social service systems. As part of this effort, the continuing development of cross-national information systems is needed alongside national and cross-national research, in order to unearth similarities and differences and to begin to see how the EU can function in a more integrated and co-operative social welfare effort in the future.

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## A Note on Index Construction and Use

by Lisa Alfredson

The detailed Subject Index was constructed to enable readers to locate specific information and references throughout the book and to facilitate cross-national research. It contains:

- **a detailed, alphabetised, table of contents for each country. This consists of the location of Sections A and D (Synopsis of social services system, and Summary assessment of current debates) in each country chapter, as well as a complete list of subcategories covered in Sections B and C (Annotated Bibliography and Special Fields) of each chapter. Subcategories are reproduced as they appear in the chapters, and tend to include several *fields*, i.e.: “Frail elderly, nursing homes, long-term care” appear under one heading; these headings generally correspond to the standard list of subcategories authors were asked to use as a guide, but do vary slightly from country to country.**
- **individual words and phrases within subcategories throughout the text. This provides more detailed coverage of individual subject fields across countries: i.e. “Child care” is followed by the complete list of page numbers throughout the book where information on child care appears. This facilitates analysis of all resources relevant to specific categories *within* certain countries, or *across* countries**

The Author index similarly enables readers to easily discover every country chapter in which each author is cited.

To enable cross-national analysis in both the Author and Subject indices, an accessible index “Key” appears throughout the index on the right hand side. This key displays the abbreviations for specific countries, as provided below, followed by the page numbers of the relevant country chapter. As the country chapters appear in alphabetical order, this Key reproduces the contents structure of the book. Using the Key, readers may easily locate which index entries occur in which country chapters. For example, users may consult the index to look up references pertaining to “Financing”, find a particular Financing subfield such as “non-profit organisations”, and using the page number provided, refer to the Key to find that the entry occurs in the chapter on Austria, or even in multiple country chapters. This allows quick location of very specific information on individual countries as well as on particular sets of countries which the reader may be interested in comparing.

Austria	<b>Au</b>	Italy	<b>It</b>
Belgium	<b>Be</b>	Luxembourg	<b>Lu</b>
Denmark	<b>De</b>	Netherlands	<b>Ne</b>
Finland	<b>Fi</b>	Portugal	<b>Po</b>
France	<b>Fr</b>	Spain	<b>Sp</b>
Germany	<b>Ge</b>	Sweden	<b>Sw</b>
Greece	<b>Gr</b>	UK	<b>Un</b>
Ireland	<b>Ir</b>		

While the index is quite detailed, as the country chapters are, it should be noted that authors of the country chapters sometimes diverged slightly from the chapter structure guidelines, either from lack of relevant sources or to include extra categories. Thus some subcategories do not occur cross-nationally for all countries. For example, the UK chapter contains the extra subcategories “Domestic Violence”, “AIDS” and “Mental illness and learning disabilities” under the Section C on Special Fields, while other chapters do not. In some instances work covered under different subcategories in other chapters may overlap with these extra fields, enabling some degree of comparison. However the absence of references for comparison does not, in this instance, imply that no relevant works exist in other countries.

The reader should also be aware of differences in the dominant terminology across countries. Where possible, every attempt has been made in the index to provide some continuity across different terms with similar meaning, such as “Home care” and “home help” by providing cross-references. This occurs as well with more specific terms in the language of the country of origin when used by authors of particular country chapters, for example the term “aide sociale” referring to social services in France; in this case the reader is directed to the page where this term is explained by the author, and can then proceed to make more specific enquiries.

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