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THE UNEXPECTED INSTITUTIONALIZATION OF MINIMUM INCOME IN SPAIN

weL
Laboratorio Welfare

workingpaper

 **Centro Einaudi**

N2 2016 ISSN 2036-1246



Laboratorio di Politica Comparata
e Filosofia Pubblica

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OF MINIMUM INCOME IN SPAIN**

Centro Einaudi • Laboratorio di Politica Comparata e Filosofia Pubblica
con il sostegno della Compagnia di San Paolo

Working Paper-LPF n. 2 • 2016

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The underlying idea is that implementing forms of “civilized” politics is desirable as well as feasible. And, as far as the Italian political system is concerned, it is also urgently needed, since the system appears to be poorly prepared to deal with the challenges emerging in many policy areas: from welfare state reform to the governance of immigration, from the selection criteria in education and in public administration to the regulation of ethically sensitive issues.

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KEYWORDS

Welfare, minimum income protection, social inclusion,
poverty, decentralization, Spain

ABSTRACT

THE UNEXPECTED INSTITUTIONALIZATION OF MINIMUM INCOME IN SPAIN

Traditionally, social assistance and minimum income protection has been the weakest front of achievement of Southern European welfare state. In Spain, counteracting the inertia of the national level, all Autonomous Communities introduced programs that – albeit with differences - all aim at tackling poverty and social exclusion through universalistic benefits for individuals with incomes below an established threshold, associated with measures to promote social and labour market integration of beneficiaries.

The peculiarity of the Spanish case rests on the fact that regional safety nets have been introduced in absence of a national legislative framework setting minimum standards, guaranteeing coordination between different instruments, substituting regional governments in case of non-compliance and assuring the diffusion of best practices. Against this background, this paper aims to investigate the consequences of this uncoordinated decentralization process, providing firstly a detailed description of the policy evolution of regional safety nets in Spain and highlighting the comparative peculiarities of this fragmented minimum income model. Secondly, it discusses whether the decentralization process has led to greater efficiency and responsiveness to local specific issues, or rather has augmented territorial inequality between poor and rich regions in the possibility of accessing to inclusive and protective minimum income benefits.

THE UNEXPECTED INSTITUTIONALIZATION OF MINIMUM INCOME IN SPAIN

1. INTRODUCTION

Traditionally, the absence of a minimum income scheme (Mis) has been one of the defining features of the Southern European welfare model (Ferrera, 1996). In the last years however, countries in this cluster have witnessed major changes in this policy field (Jessoula et al., 2015, Lalioti, 2016). In particular, in Spain, despite inertia at the national level, in the short period between 1989-95 all Autonomous Communities (ACs) introduced programs that – albeit with differences - all aimed at tackling poverty and social exclusion through universalistic benefits for individuals with incomes below a certain threshold, associated with measures aimed at promoting social and labour market integration of beneficiaries (Arriba and Moreno, 2005).

The peculiarity of the Spanish case rests on the fact that regional safety nets have been introduced in the absence of a national legislative framework setting minimum standards, guaranteeing coordination between different instruments, substituting regional governments in case of non-compliance and facilitating the diffusion of best practices. Questions arise whether those measures - which were also expanded and consolidated in the last two decades – add up to an integrated system. If, on the one hand, they provide a broad economic safety net for the poorest sector of the population, on the other, these programs are characterized by uneven protective intensity, marked institutional differentiation as well as a growing tendency to apply the principle of activation to the most vulnerable.

Against this background, this paper aims to investigate the consequences of this uncoordinated process of decentralization, providing a detailed description of the evolution of regional safety nets in Spain, also highlighting the peculiarities of the fragmented Spanish system of minimum income protection in a comparative perspective. Particular attention will be given to the illustration of regional differences in terms of benefit generosity, coverage, expenditure, governance structure and level of conditionality, in order to assess whether the decentralization process has either led to greater efficiency and responsiveness to local specific issues, or has rather augmented territorial inequality between poor and rich regions, reducing the possibility for citizens living in the least economically developed part of the country to access inclusive and protective minimum income schemes.

The paper is organized as follows. The next paragraph describes the process leading to the introduction of regional safety nets in all Spanish Autonomous Communities (ACs) and outlines the main features of those regional measures in the initial phase (1988 – 1995). The third paragraph focuses on the period 1996-2005, characterized by limited development in this policy field coupled with increasing territorial differentiation and growing tendency to make benefits conditional on job-search activities. The fourth analyses the expansion – in terms of generosity, coverage rate and expenditure - of regional anti-poverty measures during the economic-financial crisis and the subsequent Great Recession 2008-15. The fifth paragraph points at the comparative strengths and weaknesses of the fragmented Spanish model of minimum income protection, while paragraph 6 concludes.

2. PATH DEPARTURE: THE INTRODUCTION OF REGIONAL SAFETY NETS IN SPAIN, 1988-95

At the end of the 1980s, Spain displayed a very weak system of minimum income protection for the working age population. The authoritarian welfare state (Rodríguez Cabrero, 2004) built during the late Francoism was characterized by the prevalence of social insurance schemes and a rudimentary system of social assistance, while the Church - benefiting from large state subsidies - and the family played a crucial subsidiary role (Arriba and Moreno, 2002, Guillén, 2010). Public intervention in the anti-poverty field was provided locally and with great territorial differentiation, while the family was ultimately responsible for the well-being of its member (Naldini, 2002).

The introduction of the *Revenu Minimum d'Insertion* (Minimum Insertion Income) in neighbouring France and the entry into the European Union, with the consequent participation to the Poverty Programs launched by the European Commission, contributed to prompt a political debate on poverty and social exclusion. In particular, religious associations drew attention on anti-poverty policies and minimum income protection. Since January 1986, Caritas Spain officially supported the introduction of a comprehensive safety net, a decision followed by an intense advocacy at national and local level. On the other hand, social workers' professional associations assumed a more tepid position towards the adoption of a Mis, since they would have preferred to strengthen the structure and the organic of the social service system (Aguilar, 2009).

Requests to introduce a last resort safety net were strongly backed by both Spanish trade unions - Comisiones Obreras (CC. OO.) and Unión General de Trabajadores (UGT) which included a minimum income scheme in the *Propuesta Sindical Prioritaria* (Union Priorities Proposal, PSP) signed on October 1989 (Arriba and Moreno, 2005). This proposal was addressed to the national government and to all the Autonomous Communities (ACs). Moreover, some parties systematically included a minimum income scheme within their electoral programs at national and regional level: with different accents and forms, this is the case of left parties

such as Izquierda Unida (Maravall, 1990) and of parties of Christian Democratic tradition such as Centro Democrático Social (Revilla, 1990), or regionalist centrist parties such as Partido Nacionalista Vasco and Convergència Y Unió in Catalonia. Notwithstanding those pressures, the Spanish socialist government opposed means-tested benefit against poverty and preferred to focus its initiatives in other policy field (Arriba, 1999; Natili, 2015).

Against this background, in Spain the dynamics of welfare state change collided with spatial policy rescaling, leading sub-national units to introduce regional minimum income schemes. In particular, we observe two distinct paths across ACs, both leading to the introduction of regional anti-poverty measures. In the Basque Country, Cataluña and Navarra, regionalist centre parties, with strong organizational ties with the catholic movement, supported the introduction of regional safety nets, not least with a “region building” purpose. In all the other ACs, trade unions were able to negotiate with regional governments the introduction of Mis: in the short period between the end of 1989 and 1991, social partners and subnational government signed social pacts which included regional Mis.

As a result of these distinct processes, in 1989-95 all Autonomous Communities introduced public anti-poverty programs that – despite significant variation - combined a monetary support with measures to promote social and labour market integration of beneficiaries (Arriba and Moreno, 2005). Regional safety nets constituted in Spain a *path departure* from the weak original model, providing protection to all those previously uncovered citizens with an income below an established threshold and non-possessing the contributions necessary to access to social insurance benefits, embodying therefore the “selective universalism” principle (Jessoula and Alti, 2010).

Despite the heterogeneity of their institutional design - in terms of generosity, eligibility criteria, coverage and activation measures – it is possible to identify the main features of the Spanish minimum income protection system at the beginning of the Nineties.

First, entitlement to Mis rested on subjective and judiciable rights as well as on codified administrative procedures only in a very limited number of cases; in most regions access to these programs largely depended on discretionary administrative decisions, these in turn being conditional on both the amount of resources made available in annual budget laws and the political will of regional administrations. Given the high regional differentiation in terms of budget available for those programs, it was possible that where poverty was more widespread, the chances to access were more limited, when not almost entirely precluded.

Secondly, resources allocated for these measures were extremely limited. In 1996, total expenditure for regional safety net was below 0.03% of the GDP. Therefore,

regional Mis provided a modest economic support to a very narrow segment of the population, i.e. they were residual schemes aimed at combating very extreme conditions of poverty. Benefit amounts – and, thus, access threshold - were well below 50% of the minimum wage. Equivalence scales were regionally differentiated, but with the exception of the Basque Country, for a household made of four people the benefit amount was significantly lower than the minimum wage. This feature had not only the effect that in most regions the benefit was inadequate to lift households - especially numerous - above the poverty line, but also severely limited the segment of the population that could access. The presence of patrimonial and behavioural requirements (see below), as well as strong budgetary constraints, further restricted the possibility to access: as a result, in 1993, only 0.19% of Spanish households, a very limited part of poor Spaniards, received these benefits.

Thirdly, territorial fragmentation was evident: it regarded available resources, benefit generosity, coverage, institutional as well as social inclusion elements. Regional expenditure did not only vary greatly from one region to another, it was also frequently lower in those regions where poverty rates were higher. Increasing the complexity of the system, each region introduced a mosaic of different means-tested benefits rather than a unique, inclusive and organic Mis, and it was not unusual that, in addition to these measures, other forms of economic support took into account the specific housing and/or training needs. Moreover, the system lacked inter-territorial coordination mechanisms (Ayala, 2012) both with national and municipal means-tested poor relief measures.

Fourthly, those measures were not only aimed at alleviating poverty, but also at the social and possibly labour (re-)insertion of beneficiaries. Therefore, those measures had a contractual nature, requiring the signing, at least on paper, of a concerted plan between the social services and the beneficiaries. Especially in a first phase those measures differed widely regarding their social integration component (Aguilar, Gaviria and Laparra, 1995): broadly speaking, we can divide them between regions providing social and – rarely - labour market services and those favouring the direct creation of public jobs in municipal or regional government as the main form of social re-integration. Both form of social inclusion - but especially the provision of services - were limited by severe implementation gaps. The presence of very strict behavioural requirements was another striking characteristic of Spanish minimum income schemes. According to the regional laws, if the beneficiary were to make a loosely defined “improper” use of the monetary allowance and/or did not guarantee adequate caring of underage children, social workers could withdraw the benefit. Since such strong conditionality was rarely accompanied by services that would allow to effectively overcome social problems, in many regional cases the threat of losing the subsidy appeared as the only “social integration” measure.

With the approval in the Balearic Islands of Decree 36/1995, all ACs had introduced anti-poverty measures: path departure from the original model was thus completed. Despite the relevance of this institutional innovation for the Spanish welfare state, in the mid-1990s the Mip system still appeared strongly residual and comparatively underdeveloped (Aguilar, Gaviria and Laparra, 1995).

3. 1996–2006: A LOST DECADE? REGIONAL SAFETY NETS BETWEEN POLICY INERTIA AND LIMITED ACTIVATION.

In the mid-1990s the period of expansion of social spending in Spain and the creation of regional systems of social assistance came to an end, replaced by a season of concern for rationalization, maintenance and viability of the system of social protection, focused especially in securing its financing (Rodríguez-Cabrero, 2004). Meanwhile, during the late 1990s and early 2000s, the Spanish economy experienced an intense growth: on average, between 1995 and 2005 the GDP grew of 3.9 percentage points per year, whereas unemployment decreased from 20.7% in 1995 to 9.2% in 2005. Even though this did not translate in a reduction of poverty and social exclusion (Ayala, 2012), those trends contributed to remove poverty from the political agenda: the introduction of a national Mis was never proposed by any political party in the parliamentary debate and, at least at the national level, it did not rank high in trade unions' bargaining agenda. Despite that in 2000 a new scarcely financed scheme - called *Renta Activa de Inserción* (RAI) - was introduced, aiming at labour market re-insertion of long term unemployed, aged 45 plus, who have exhausted their unemployment benefits and have family dependents. This measure strengthened Mip in Spain while contributing to sector fragmentation.

Also at the regional level inertia prevailed in the field of Mip, leading some authors to label this decade as a sort of *travesía del desierto* [lit. journey across the desert] (Laparra, 2004). In fact, the most critical nodes of the regional Mip were left almost untouched, and very few regions removed the budgetary constraints that severely limited the possibility to access to those measures. However, similar to the path departure phase, strong territorial differences existed and some regions - most notably Cataluña, Madrid and Navarra, which transformed their residual safety net into a right-based Mis - introduced significant reforms that made substantial improvement in their Mip system.

The majority of the CAs made only incremental legislative interventions, in most cases increasing - although limitedly - benefit amount and coverage rate, whereas other regions did not intervene at all in this policy field. As a result, total regional expenditure for the Mis rose limitedly, from 165 million euro in 1996 to around 350 million in 2005, i.e. the 0,04% of the Spanish GDP. This growth is inadequate and territorially differentiated - caused in particular by the decision of the Basque country to extend the Mis coverage to poor elderly in 2000, de facto resulting in an expenditure growth of 114.3% between 2000 and 2004. Significant expenditure

increase affected however also other CAs, in particular those who have introduced expansionary reforms and where programs were already more developed in the first phase (Cataluña, Madrid, Navarra, but also Galicia and Castile and León).

The generosity of regional minimum income schemes increased in almost all regional contexts, even though benefit amount remained well below the minimum wage and/or the relative poverty threshold. If in 1997, the average amount of the benefit for a single person was equal to 235.7 euro - 58% of the minimum wage - in 2004 it was equal to 318 euro. Behind those data persisted regional differences, with basic benefit amounts ranging from 249 euro in Cantabria to 426 euro in the Basque Country - a striking difference considering that those are two neighbouring CAs with very similar cost living standards.

Since the access threshold became slightly higher, Mis coverage, (slowly) increased: household beneficiaries passed from 63.714 in 1996 to 96.899 in 2004. This very slow process of increase of coverage was however inadequate vis à vis the needs of the population, since only a limited share of the extremely poor could have access to those benefit: in 2004, the severe poverty rate – i.e. the percentage of people with an income below 40% of the median income – was 7.4%, whereas only 0.6% of the population received Mis.

Alongside these partial improvements, this phase is characterized by both the participation of many ACs to the European OMC process and the diffusion of the activation paradigm in accordance with the directives of the Lisbon strategy (Perez Eransus, Arriba and Parrilla, 2009). This resulted in a change of the nature of regional Mis, which, similarly to other European countries, became to a greater extent conditional on the recipients' willingness to work and increasingly assumed a "reintegrative" function (Moreira, 2008).

In particular, in most regions the creation of subsidized jobs – i.e. "socially useful jobs" - in public offices ceased to be the main social integration tool, even though they remained one of the possible activation strategies in some ACs (eg. Galicia, Madrid, Navarra) (Laparra, 2004). Conversely, since the beginning of the 2000s, many ACs increased their effort in linking economic support with different services, especially devoted to the labour market (re) integration of Mis beneficiaries. This process included two different dimensions. On the one hand, it is increasingly mandatory for beneficiaries to be active in the job search (Perez Eransus, Arriba and Parrilla, 2009). In particular, it becomes common to find in regional laws references to the duty of labour market integration, formal requirements not to refuse any job, and greater controls over beneficiaries - who are increasingly demanded, at least formally, to present themselves to the appropriate offices whenever required. On the other hand, we see attempts to facilitate the horizontal integration between employment and social services, in an effort to move towards an individualized and multidimensional approach that should strengthen individual ability to participate in the labour market. Some regional laws even introduced – at

least formally – plans to fight the marginalization of Mis beneficiaries through the combined action of housing, health, education, labour and social departments. This integrated approach is particularly pronounced in the community of Madrid, where access to financial support is tied to an intensive take-over by social services, which are required to assess beneficiaries' competencies and social problems, to stipulate a personalized program that included measures of physical, mental, social and of family support, and to ensure the effective implementation of those measures through time. The Madrid case is not isolated, as many ACs introduces cross-sectoral plans with the specific goal of social inclusion, under the impulse of the European Union OMC process (Perez Eransus, Arriba and Parrilla, 2009). However, implementation gap and the limited financing of employment and social services meant that the activation strategy has concretized mostly in its first dimension, namely aimed at kick-starting the unemployed' return to work (Rodríguez-Cabrero, 2009). At the same time, the development of insertion programs constitutes a significant novelty in the Spanish social service tradition, constituting an important advance in social intervention (Ayala, 2012), despite the usual limitation in terms of territorial differentiation and implementation difficulties.

We may therefore conclude that in this decade, the most relevant weaknesses of the Spanish Mis system were not overcome. Regional Mis remained mainly discretionary, highly residual, and in many case also predominantly passive. At the same time, some promising seeds were introduced in some front-runners ACs. Moreover, regional anti-poverty programs changed in many cases their nature and governance structure, moving towards an integrated and multi-dimensional approach which, however, in many regional cases did not result concretely in an increase in their protective capacity.

4. FACING THE CRISIS: THE EXPANSION OF REGIONAL MINIMUM INCOME SCHEMES, 2007-14

The Great Recession had a tremendous impact on the policy trajectories of regional Mis in Spain. At the national level, the onset of the financial and subsequently economic crisis deeply influenced the policy trajectories of the Spanish welfare state, which in the first years of the new Socialist government experienced a new expansionary period (Guillén, 2010). In the short period from 2008 to 2013, GDP declined of 7.3 points, while the number of unemployed dramatically increased from 8.3% in 2007 to 24.5% in 2014. As for poverty and social exclusion, all European indicators reveals the dramatic social consequences of the recession: the “anchored” poverty rate reached 22.2% of the population in 2013 – with a growth of 1.9% from 2008, the third most relevant increase in the

Eu28 after Greece and Portugal – whereas the “severe poverty rate”¹ reached 9.3% of the population (+ 1.9%) (Jessoula, Matsaganis and Natili, 2015).

The initial reaction of the Socialist government – from March 2008 to November 2011 - was to use social protection as an instrument to mitigate the adverse effects of the crisis on the population. In 2009 it was introduced a “Temporary programme for unemployment protection and integration” (PRODI) with the aim of expand unemployment benefits to those workers whose benefits had already run out.² More in general, no restrictive reforms were approved until 2011, when the reform of the pension system was practically imposed on the country by the EU and the public debt crisis. In the health care sphere, restrictive measures have been approved regarding rationalizing the costs of pharmaceutical services (Law 4/2010) (Guillén et al., 2009-2010; CES 2010-2011). Simultaneously, the crisis actually prompted the re-launch of a debate about the possible introduction of a national safety net. Trade unions, in particular, made an official proposal to the government in 2014; NGO’s – and especially EAPN Spain - backed the proposal by Comisiones Obreras. Also some political parties actively called for reinforcing minimum income protection: among these, Izquierda Unida – which had failed to create a commission aimed at studying the viability of a national minimum income scheme in 2007 and had traditionally supported trade unions’ proposals in this field – and lately Podemos which has included the establishment of a national means-tested safety net in his political programme. Despite pressures, mounting unemployment and poverty, national measures in the field of last resort income support remained extremely weak and no social rights were introduced to fight absolute poverty.

In this context, despite increasing budgetary constraints and strong pressures towards containing sub-national expenditure (Del Pino and Pavolini, 2015), between 2007 and 2014 a significant – though possibly not sufficient - expansion of regional safety nets is apparent in Spain. This was very often the consequence of a political exchange between regional governments and trade unions, where the latter obtained the expansion of last resort safety nets and the former legitimacy and sharing responsibilities regarding public policies (Natili, 2015). This expansion touched almost all the relevant weaknesses of the Spanish Mip system.

Many regions introduced in fact ameliorative legislative changes in the definition of the entitlement to this social benefit. Particularly relevant is the approval of Law 4 of 2005 in Asturias, which marks a turning point for regional Mip paving the way for a series of legislative changes aimed at formal recognition of the right to a

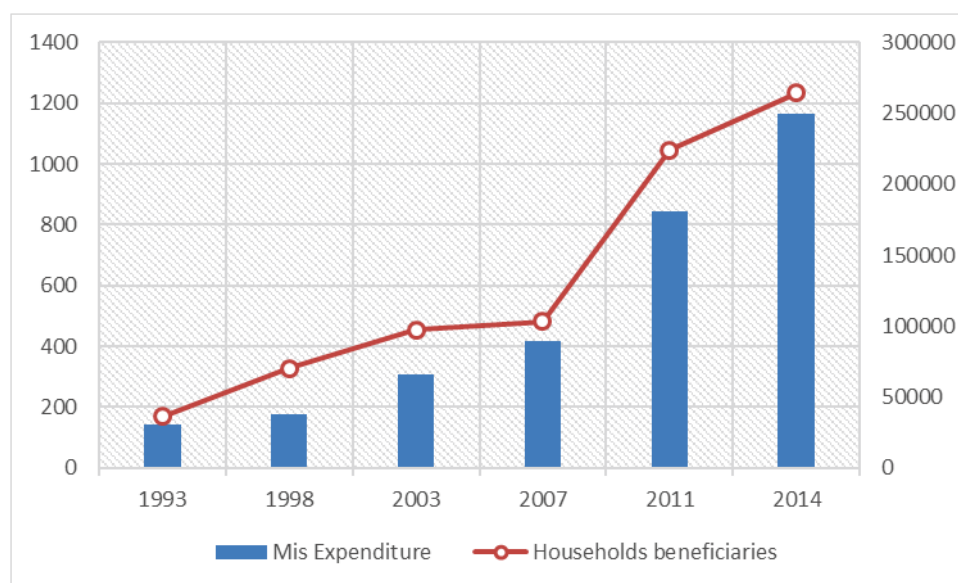
¹ The severe poverty rate indicates the proportion of population with an income below 40% of median income, instead of 60% as it is usually done.

² This program – reformed several times in the last years, and nowadays called Plan Prepara - consists of a means tested benefit of 400 euro for the unemployed under 65 who have exhausted other benefit rights and whose families have no other source of income. The strong conditionality as well as the impossibility to receive twice the benefit severely limits the number of beneficiaries (Arriba, 2014).

minimum amount of resources necessary to maintain decent living standards. This right has been announced in the new Statutes of Autonomies that were approved in 2006 and 2007 in six regions: Andalusia, Aragón, Baleares, Castile and Leon, Catalonia, Extremadura and the Valencian Community. More concretely, the legal right to access these measures is afterwards recognized in specific laws in Cantabria (Ley 2/2007), Castile and Leon (Ley 7/2010), Extremadura (Ley 9/2014), Galicia (Ley 10/2013) and La Rioja (Ley 7/2009), in addition to regions that already did so (Cataluña, Madrid, Navarra and the Basque Country). Incremental legislative improvements were introduced in other regions such as Murcia (Ley 3/2007), Valencian Community (Ley 9/2007), where it is attenuated the extremely residual character of the measure, although those ACs constitute nowadays in Spain – jointly with the Balearic Islands, Canaries, and Castile La Mancha – the only CA's where the possibility to access is still subject to budgetary constraints (Ministerio de Sanidad, Servicios Sociales, y Igualdad, 2015).

Additionally, beneficiaries more than doubled in the same period and the coverage rate increased from 0,6% in 2006 to 1,45% in 2014 (Fig. 1). Although generalized, this growth is regionally differentiated: in the Basque Country coverage rate grew of more than 4 percentage points while in Castile – La Mancha less than 0.4 and in Murcia of 0.5. These developments suggest a trend towards greater fragmentation of minimum protection in Spain, which - far from decreasing - has grown since the early-2000s.

Fig. 1. Evolution of total regional Mis expenditure and household beneficiaries in Spain, selected years.



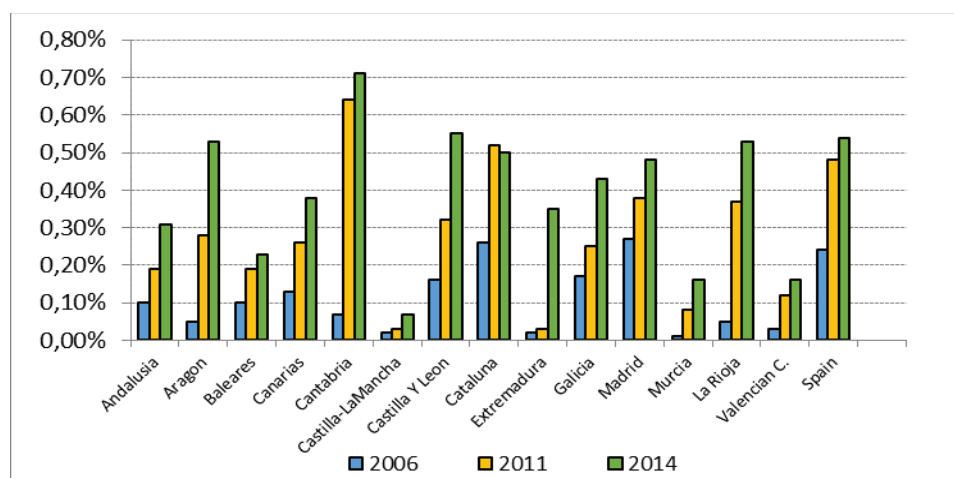
Source: Author's elaboration on Ministerio de Sanidad, Servicios Sociales e Igualdad

Mis expansion in Spain is not simply a reflection of rising caseloads, since benefit levels also increased in real terms. The amount of the average benefit shifted from 353 euros per month in 2006 (56% of the minimum wage) to 430 euros (65.7%) in 2014. Regional differences remained relevant, since the basic benefits amount ranges from 300 euro in Murcia to 666 € in the Basque Country. Those differences are even greater if we consider larger households: four-member household receive up to 434 euro in the Valencian Community, 945,88 in the Basque Country.

The combination of enhanced legal guarantees, higher thresholds for accessing the benefit and the social consequences of the economic crisis, resulted in a significant expansion of total expenditure on Spanish regional Mis, which increased from around €360 million in 2006 to almost 1.2 billion in 2014 (Fig. 1). Although the total expenditure as well as the number beneficiaries increased in all ACs this joint representation hides considerable differences, as spending particularly increased in special financing regions (Navarra and the Basque Country). However, it is important to underline that those trends are generalized: in all ACs, generosity, coverage and expenditure increased during the Great Recession, especially in the period between 2008 and 2012.

What appears particularly important – especially in comparative perspective - is that expenditure for regional Mis grew in a period of strong budgetary constraints. If we consider a standard measure of “welfare effort” – i.e. Mis expenditure as a percentage of total regional budgets – this increased significantly in all Spanish regions, also limiting our analysis to the regions with “ordinary” forms of financing (Fig. 2). Particularly impressive is the expansion in some CA’s – such as Aragon, Cantabria, Extremadura and La Rioja – that prior to the crisis had very residual safety nets (Fig. 2).

Fig. 2 Expenditure for Mis as a % of total regional budget, selected years, ordinary financing CA’s



Source: Author elaboration on Ministerio de Sanidad, Servicios Sociales e Igualdad, several years

Finally, along with policy expansion, this period is characterized by the introduction of some institutional innovations further in the direction of stronger conditionality and activation. In particular, we observe the diffusion in all Autonomous Communities of complex sanction mechanisms – previously existent in the Community of Madrid and the Basque Country only – that intervene in cases in which beneficiaries do not comply with the plan agreed with the social services, or commit frauds to gain access to the benefit. In the majority of regional Mis a gradual curtailment of the monetary benefit depending on the severity and/or the cumulative nature of the beneficiary “faults” was in fact introduced. Besides that, innovations are introduced in certain regions, with the aim of addressing the so-called poverty trap and making “more convenient to return to work”. In some regions – and especially Aragon and Castile and León – income deductions have been introduced allowing to combine income from work and minimum income, along the same lines of what is happening in many other European countries. In the Basque Country and in Castile and León alongside the traditional safety net have been introduced special services and treatments for workers benefiting of anti-poverty schemes. Moreover, in some ACs the regional safety net is nowadays managed by the employment centre rather than the social services. Those approaches are in line with the stronger emphasis posed on labour market integration typical of many ACs – and European countries –, but are interesting because seem to go in the direction of reducing the extremely residual approach typical of regional Mis in Spain, and to address the increasingly thorny issue of working poverty.

5. THE INSTITUTIONALIZATION OF A MINIMUM INCOME SYSTEM?

In the previous paragraphs we analysed the policy trajectories of regional anti-poverty safety net in Spain, which from a series of discretionary regional measures aimed at relieving the most marginalized and at risk of exclusion segment of the population, have become – in most regional cases – a right based income support measure targeted to the individuals with an income below a pre-defined threshold, independently from their social and labour market situation. What appears particularly significant about this trajectory is that expansion of regional safety nets – in term of expenditure, coverage, benefits and welfare effort – has occurred in all Spanish Autonomous Communities, although in a differentiated way. Moreover, this trajectory appears uni-directional: in no case – to our knowledge – regional Mis have been subjects to severe subtractive reforms, even though substantive efforts to control public expenditure are evident in some cases (e.g. Madrid, Cataluña). The main question is therefore whether Spain has finally overcome the barriers that have traditionally impeded the construction of a minimum income protection system in Southern Europe, thus finally catching up with “European standards” in this policy field. If this is the case, this twenty-five years long trajectory can be actually defined as one of a gradual institutionalization (Mahoney and Thelen, 2010) of a minimum income protection system. In order to

answer to this question, in this final paragraph, we highlight the peculiarities – both positive and negative - of the Spanish system of minimum income protection in comparative perspective.

5.1. Low coverage and territorial inequality: the limits of the fragmented Spanish model

In the previous paragraph, we highlighted that through a series of legislative reforms, most of the regional safety nets – with the exception of Balearic Islands, Canaries, Murcia and Valencian Community – have removed budgetary constraints, so that nowadays a person who is formally entitled to the benefit, yet excluded, has the right to appeal to a court. Still, Mis beneficiaries – although increasing – are well below the number of people experiencing economic hardship in Spain (Arriba, 2014). Partially this is a trend observable in all industrialized countries: a study recently published by Eurofound [2014] concluded that all the estimates made over the years - related to various countries and using different methodologies - show percentages of *not take up* greater than 40%, so that it is quite normal – although, perhaps, not acceptable - to have more poor than social assistance beneficiaries. However, this appears a particularly worrying phenomenon in Spain, since the distance between Mis beneficiaries and the share of people experiencing material deprivation is among the highest in Europe (Tab.1).

Tab. 1. Coverage rate and Material Deprivation Rate in 2014, selected countries

Country	Mis Coverage	Material Deprivation Rate	Percentage point difference
Austria	2,8%	4%	- 1,2%
Denmark	4,9%	3,2%	+ 1,7%
France	5,6%	4,8%	+ 0,8%
Netherlands	1,9%	3,2%	- 1,3%
Portugal	1,9%	10,6%	- 8,7%
United Kingdom	3,1%	7,3%	- 4,2%
Spain	1,4%	7,1%	- 5,7%

Source: Author elaboration from National Statistical Offices and Eurostat

Some specific characteristics of the regional anti-poverty measures contribute to explain such undesirable record. Firstly, the Spanish minimum income system is still among the most complex in Europe. The absence of a common regulatory framework allows for very different regional requirements and procedures, increasing the asymmetries on information between administration and beneficiaries that frequently are among the most frequently cited causes of high

level of non take-up of social assistance benefits (Matsaganis et al., 2008). In top of that, regions have adopted very unclear and elaborated selection procedures, severely undermining the possibility of potential beneficiaries to access to regional safety nets, particularly in reason of their socio-demographic characteristics – i.e. low education and income levels.

Secondly, patrimonial requirements are often very stringent in the Spanish case, significantly decreasing the number of potential beneficiaries. As an example, in Castile and León owing a small and non-rentable house in the countryside – which is very common in this part of the country – is sufficient to have precluded the possibility to access to the regional safety nets. Moreover, migrants have to demonstrate that they do not have similar possession in their native countries, so that they have to obtain the necessary documents – often requiring to travel back home - and having them officially translated in Spanish, a process so complicated and expensive that frequently discourage them to file in an application. Similar procedures – which have the clear goal of maintaining under strict control the total number of beneficiaries – exists in most of the regional regulations, severely restricting the number of beneficiaries in the Spanish case.

Thirdly, discouraging procedures are very often – although not always - coupled with low administrative capacities, especially in terms of lack of IT infrastructure and adequate personnel. Means-tested benefits require the ability to make a plausible estimate of applicant's income. This means that different level of the public administration – municipal social services, regional government, labour and finance ministries, etc. - have to be able to communicate through an integrated data processing structure, something which has been introduced only in a limited number of regional cases. Furthermore, also due to the complexity of the procedures, the exponential growth of request in reason of the Great Recessions made necessary to strengthen the bureaucratic structure, something which was only randomly done. This resulted in one of the main weaknesses of the Spanish Mis: the long waiting time. According to Caritas (2013) the average waiting period between the application and the effective payments is six months, but in the most extreme case can be more than one year, leaving beneficiaries in a sort of dependency limbo, with rights to services and benefits recognized but not receiving them.

The combined effect of system fragmentation, the presence of very strict and complex access requirements and selection procedures, and limited administrative effectiveness strongly undermine the possibility to access to the Spanish last resort safety nets, therefore reducing the protective capacity of those regional instruments.

The second most relevant weakness of the Spanish minimum income protection system is territorial differentiation (Ayala, 2012). Wide differences exist among regional safety nets in terms of generosity, coverage rate and expenditure – not to

mention regulation and conditionality requirements. In terms of generosity, benefit amount differs among ACs, and the difference between the most and least generous case is impressive (Tab. 2). What appears particularly worrying is that territorial differences in this dimensions are increasing: if in 2004 the differences among the least and the most generous amount were of 176 euro, ten years later are more than doubled, reaching 362 euro.

Tab. 2. Generosity of regional Mis in Spain, 2014.

Generosity	Basic Amount	Maximum Amount
Least Generous	300	372
State Average	427,3	683,4
Most Generous	662	962

Source: Ministerio de Sanidad, Servicios Sociales, e Igualdad, 2015

Equally relevant are the differences in terms of coverage rate and expenditure. Even limiting our analysis to regions which did not enjoy special fiscal treatment – as it is done in tab. 3 – Spanish territorial differences are strong and persistent. Perhaps more worrisome, rather than decreasing, in the last years' policy expansion has been accompanied by increasing territorial differentiation.

Tab. 3. Expenditure and coverage rate of regional Mis in Spain, selected years.

	Coverage	Expenditure	Coverage	Expenditure
	(% of regional households)	(% of total regional exp)	(% of regional households)	(% of total regional exp.)
	2008		2014	
Least protective	0,06%	0,02%	0,32%	0,07%
State Average	0,68%	0,25%	1,45%	0,67%
Most protective	1,61%	0,59%	3,37%	2,16%

Source: Ministerio de Sanidad, Servicios Sociales, e Igualdad, 2009 and 2015

In general, territorial differentiation might not be necessarily a problem; after all it might be that approaching the level of government to citizens enhance efficiency and responsiveness to people's problems, and therefore differentiation is simply a result of different conditions. Problems of equality arise however when the least economically developed part of the country – where poverty is concentrated – have worst social programs.

Actually, if it is not possible to argue that in Spain richer regions have better programs – for example, Madrid, the ACs with the highest GDP per capita in Spain has a less generous and protective measure than the Spanish average – it seems that the most economically underdeveloped autonomous communities – where the need for effective safety nets is higher – often have less protective schemes. As table 4 displays, the four regions with the lowest regional GDP in Spain – Extremadura, Andalusia, Castile La Mancha and Murcia – have safety nets which have a far lower protective capacity.

Tab. 4. Generosity, Coverage and Expenditure per capita of regional Mis, selected regions.

Region	GDP per capita	Basic Monthly Amount	Coverage	Expenditure per capita
Extremadura	15.500	€426	2,2%	€16.3
Andalusia	16.800	€400	0,7%	€11.05
Castille LaMancha	18.300	€372	0,5%	€2.27
Murcia	18.400	€300	0,6%	€4.9
Spain (Average)	22500	€429	1,4%	€25.47
Aragon	24700	€441	2.4%	€22.2
Basque Country	29.300	€665	5,1%	€205.20

Source: Author elaboration based on Ministerio de Hacienda and Ministerio de Sanidad, Servicios Sociales, e Igualdad

A national intervention aimed at guaranteeing the diffusions of best practices, setting minimum standards, ensuring coordination between different instruments and to substitute regional governments in case of non-compliance and, perhaps more relevant, the presence of specific funding lines to ensure a certain degree of horizontal redistribution between subnational units thus seem particularly important to avoid the risk that decentralization leads to territorial inequalities. Within a national framework, it is possible to imagine ameliorative interventions by subnational governments, as well as some degree of freedom concerning in particular active inclusion measures that might require taking into account the specific characteristics of the local labour market. Conversely, in the current scenario - in which subnational units have exclusive jurisdiction with regard to the possibility of introducing measures in this field of policy - it seems difficult to limit the risk that the poorest regions have less generous and inclusive schemes.

5.2. Policy expansion in hard times: decentralization and anti-poverty schemes

Along with the problems mentioned above, the uncoordinated decentralization of social assistance competences in the Spanish case resulted in the introduction of different programs that currently cover the whole national territory and may be regarded as almost universal (Guillén, 2010). Therefore, it seems plausible to argue that – coupled with pressure from relevant interest groups and bi-partisan consensus about the very existence of a last-resort safety net (Lalioti, 2016; Natili, 2015) – it has favoured path departure from the original Southern European model of weak public intervention in this policy field. Three factors appear particularly important to understand the positive incentives that regional political actors faced compared to the nationals. Firstly, at the regional level it was possible to introduce budgetary constraints on access to these measures, therefore allowing controlling expenditure, while the absence of a national measure and the support of European institutions towards those schemes provided for high visibility to regional political entrepreneurs “hungry for votes and recognition”. Secondly, introducing minimum income schemes at the regional level did not result in redistribution of resources from richer to poorer parts of the country. This was a very salient issue which might have been vetoed by powerful regionalist parties – such as the Partido Nacionalista Vasco and/or the Catalan *Convergència i Unió* - in the national political arena. Finally, it is not by chance that in Spain the first regional measures were introduced by regionalist parties: in the subnational political arena, activism in the social policy realm was useful for competitive region building purposes, since social policy are powerful instrument in order to demarcate geographical spaces and stabilize new forms of political organization (Ferrera, 2005). Therefore, it seems that the uncoordinated decentralization of competences allowed the introduction of a Mip system in Spain, which would be otherwise – also in light of the comparative evidences outlined below - probably absent. As a matter of fact, despite timid efforts by some old - *Izquierda Unida* - and new – *Podemos* – political parties and by the trade unions, at the national

level it has been so far impossible to introduce an inclusive and fully fledged anti-poverty measure.

Furthermore, it is important to underline that, despite problems outlined above in terms of poorer regions having less protective schemes, in the last years are visible also some positive trends in the direction of greater territorial equality. In particular, the poorest region in Spain (Extremadura) has recently introduced expansionary reforms, strengthening significantly its last resort safety net. As a result, the number of beneficiaries has increased enormously - from 3.195 in 2013 to 25.205 in 2014 - resulting in an exponential growth of total expenditure from around 3 million to more than 17 million euro. Also in Castile La Mancha beneficiaries more than doubled from 2013 to 2014. At the same time the Basque Country – indisputably the most protective scheme in Spain – is among the very few Autonomous Community which have not contributed to the general growth of minimum income expenditure from 2013 to 2014, which has been significant (+12,1%). Despite it is too early to announce an *égalisation dans le progrès* for the Spanish safety nets, those evolutions – coupled with the extraordinary efforts made in Asturias, a medium economically developed CA in Spain which has the second most protective scheme in Spain in terms of beneficiaries and expenditure – suggest that *politics* is at least as relevant as socio-economic conditions to explain the policy trajectories of regional Mis, and it is therefore possible to have protective measures also in the less economically developed part of the country.

Such outcome – the progressive amelioration of safety nets in the most economically underdeveloped part of the country – is particularly relevant, also because so far no subtractive reforms have been introduced in the Spanish Autonomous Communities in this policy field. The absence of retrenchment – despite undeniable attempts to control public expenditure – is particularly interesting in light of the policy evolution of minimum income protection in other Mediterranean countries. In Italy, there have been several attempts to depart from the traditional model and to introduce innovative last-resort safety nets both at the national and regional level, but until recent times they were soon followed by policy reversal (Madama, Jessoula and Natili, 2014; Sacchi and Bastagli, 2005). Conversely, Portugal has introduced a national Mis at the end of the Nineties. However, during the crisis, despite the magnitude of the social distress and rapidly increasing poverty rates, the centre right Portuguese government has extensively reduced its anti-poverty effort: the reforms undertaken in 2010 and 2012 led to a reduction of beneficiaries by roughly 50%, while at the same time the average monthly benefit amount per household decreased from €239.70 to €215.21 (Jessoula et al., 2015). Nowadays, in terms of coverage rate, generosity, and expenditure per capita, the Portuguese Mis is less protective than the fragmented and uncoordinated Spanish regional model.

So far – despite similar formal and informal pressures to contain public expenditure – the Spanish regional Mis have not been subject to retrenchment

and/or policy reversal, but rather to policy expansion. This not only constitutes an exception within Southern European countries, but it is also remarkable considering the general evolution of social policies in Spain during the crisis: pensions, unemployment benefits as well as health care have all been subject to severe cuts (Pavolini, Leon, Guillén and Ascoli, 2015). It seems therefore plausible to hypothesize that the very weaknesses of the Spanish Mi model – i.e. its fragmented and uncoordinated nature – have also affected the policy-making process, allowing greater resistance against retrenchment. This appears plausible as well as in line with the literature on the relationship between federalism and the welfare state, which outlined how federalism and institutional complexity make expenditure cutbacks more difficult to achieve (Obinger et al., 2005).

6. CONCLUSIONS

Similarly to Italy and Greece – but differently from the rest of European countries – Spain has never introduced a fully-fledged and inclusive minimum income scheme at the national level. Counteracting the inertia of the national level, all the Autonomous Communities in the brief period between 1988 and 1995 have introduced anti-poverty schemes which, despite strong differentiation in terms of generosity, coverage and institutional arrangements, have gradually consolidated to the point that they constitute an established last resort safety net for poor Spaniards. However, coverage holes in the protection of the most vulnerable coupled with profound territorial differences (and inequalities) have frequently led researchers to emphasize inefficiencies and comparative weaknesses of this decentralized model of minimum income protection (Ayala, 2012, Arriba, 2014, Rodríguez Cabrero, Arriba, Marbà and Moreno-Fuentes, 2015).

However, it should not be overlooked that these programs have provided – especially during the crisis – a broad economic safety net to a relevant part of the poor population in Spain. Moreover, so far, the Spanish safety nets have – perhaps too slowly, but constantly – ameliorated their protective capacity, and despite strong pressures to contain public expenditure especially during the Great Recession neither policy reversal nor retrenchment is visible in this policy field, contrarily to what happened in the other Mediterranean countries and in all other social policy areas in Spain. This opens up the opportunity for new and fresh research concerning the relationship between federal arrangements and social policy output. It seems plausible that the uncoordinated policy making process in this policy field allowed social actors – especially trade unions, but also Caritas and more generally the Spanish anti-poverty lobby – unable to counteract national policy decisions during the crisis (Molina, 2014), greater opportunity to influence the policy making process and prevent retrenchment. In this regard, the Spanish uncoordinated and fragmented regional minimum income system – especially in a Southern European comparative perspective – might not look too bad after all.

Mis expansion in hard times constitutes moreover a challenge for the political science literature, which has frequently underlined the limited political incentives to introduce and expand targeted benefits (Korpi and Palme, 1998, Rueda, 2007), in reason of the low political resources of would be beneficiaries in a period of harsh competition for declining public resources. Conversely, in Spain we observe a coalition of interest groups – led by trade unions and Caritas – supporting the consolidation of safety nets, and an overlapping consensus among traditional left and right parties concerning the very existence of a public intervention in the anti-poverty realm. This outcome appears particularly interesting in light of the enduring difficulties in similar countries – primarily Italy, but also Greece – to depart from their traditional model, also due to the persistence of several reluctances - within both political camps – with regard to the introduction of a fully-fledged and inclusive anti-poverty measure. The politics of minimum income schemes is still a relatively unexplored area of research in the welfare literature, but more research on the political dynamics that led to path departure and the gradual institutionalization of a minimum income system in Spain would be extremely valuable.

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