

**Studying welfare systems as ecological systems:
paradigm changes, open questions and a possible research perspective**

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Long abstract (EN, not reviewed)

According to the Social policy literatures, western welfare systems are entrapped in a sort of double crisis. On the one hand, there are the increasing demands of social protection due to the changing configuration of the classical or old social risks and the emerging of new ones (Taylor-Gooby 2004). On the other, there is the fiscal crisis of the welfare state resulting from the States' responses to the economic downturn in the wake of the austerity doctrine (Farnsworth and Irving 2011).

The twos are in many ways connected fostering one another and imposing complicated dilemmas for political choices. They are also differently interpreted and tackled through politics of expansion or, more frequently, recalibration and retrenchment (Bonoli and Natali 2012; Emmenegger *et al.* 2012; Ferrera, Hemerijck and Rhodes 2000; Häusermann 2012; Hemerijck *et al.* 2013; Palier 2010; Starke *et al.* 2013; Taylor-Gooby 2013). Moreover, all these strategies are at least partly biased and entrapped into-the-box of the ways keynesian and neoliberal paradigms have shaped in the past decades dynamics and design of capitalist accumulation and social protection (Jessop 2008; Morel, Palier and Palme 2012, Schmidt and Thatcher 2013), hence creating a further massive dilemma. Indeed, while cutbacks risk to increase inequality and deprivation, particularly for weaker people, groups and communities, possible additional state expenditures risk to further boost an environmentally unsustainable growth, and both risk to enhance the emergence of new social risks (Bailey 2015; Gough and Meadowcroft 2011; Koch 2013; O'Riordan 2014; van den Bergh and Kallis 2012).

As a matter of fact, these dynamics take the form of a triple sustainability crisis of welfare state, that is economic, social and environmental. But while the latter could probably be seen as a complex non-linear systemic process of interconnected loops of causation (Bateson 1972 Byrne 1998, Eriksen 2016, Prigogine 1996; Room 2011), variables referring to the three concepts are little and only recently analyzed in terms of patterns of manifold orders of interaction, in both the social policy and sustainability literatures.

Still, various contributions of the last decade try to figure out the ongoing dynamics and scenarios, putting some important arguments on the table that are particularly helpful to frame topics and scope of this proposal/presentation (e.g. Beblavý *et al.* 2014; Bohnenberger 2016; Fitzpatrick 2011 and 2014; Gough 2010, 2014a and 2014b; Hirvilammi and Helne 2014; Koch and Mont 2016; Peeters 2012; Sommestad 2012).

1. Some scholars assert that only strong states and robust public welfare have the capacity to facilitate/promote de-carbonisation strategies, enhance notions of public and common good, and design both monetarily and ecologically efficient public welfare services (Bailey 2015; Gough and Meadowcroft 2011). The controlling idea is that, to improve the conditions for the future generations sorts of Eco-Investment State strategies are needed. Under this perspective, the emergence of the Social Investment Welfare State paradigm (SI, *henceforth*. Esping-Andersen 2002; Hemerijck 2017; Morel *et al.* 2012) is regarded as an opportunity for integrating climate mitigation/adaptation efforts

and socio-economic transformative strategies, as the social-democratic countries experience seems to display (Gough 2014; Sommestad 2012). However, the SI paradigm has to date seen only limited applications (Hemerijck 2013; Lundvall and Lorenz 2012; Sabato 2016), while the link between environmental performances and kinds of welfare systems cannot yet be supported by empirical findings and needs to be further investigated (Jakobson *et al.* 2017; Koch and Fritz 2014). Also, SI strategies are deemed controversial with regard to the triple sustainability crisis: particularly the work-first policy approaches (Häusermann and Schwander 2012; Lødemel and Moreira 2014; Van Berkel and Møller 2002), are supposed to be at risk to further boost and legitimize competitiveness and productivism, stressing the mere economic side of employment, the steady primacy of the individual chain (unlimited) preferences/ wants/ aspirations – production – redistribution – satisfaction (Gough 2014b; Jordan 2006), the commodification of social policies and reproductive work, and the unvarying dependence on growth (Boström 2012; Gough *et al.* 2008). Criticisms point out at the emphases on activation and human capital development that risk to enhance the possible creaming-out effects for marginalized and hardly employable people (Cantillon 2011; Sabatinelli and Villa 2015; Vandenbroucke and Vlemingx 2011). Furthermore, they underline the paradox of an employment-work-insurance system dependent on growth but at the same time increasingly disconnected from it and at risk of declining in its capacity to produce adequate social protection (Beblavý *et al.* 2014; Brynjolfsson and McAfee 2014; Dolphin 2015; Gnesutta 2014; Hughes 2014; Janoski *et al.* 2014). Finally, they draw attention to the unwavering attitude of social welfare to be part and a motor of a *de facto* business as usual (BAU) mode of development that may only further enhancing the chaotic dynamic of environmental unsustainability (Bailey 2015; Costanza *et al.* 2011; Espinosa and Porter 2011; Jordan 2006; Lawn 2011; Victor 2008).

2. On the other side, there are some indications that retrenchment politics, whether they are the corollary of neoliberal or post-growth transition strategies, can have even worst counter-productive effects on both equality and sustainability (Abrahamson 2017). Indeed, they can contribute to many kinds of self-reinforcing feedback-loops and schismogenic processes and to unpredictable leaps in the level of risks for poor and fragile individuals and communities (Bateson 1979; Doppelt 2003; Maruyama 1963; Room 2016). A first reason is that a weaker social welfare makes it more difficult for the poor to satisfy their basic needs, and in the wake of a high level of citizens commodification may further encourage material aspirations, competition for positional goods and unsustainable lifestyles (Jackson 2005; Lorek and Spangenberg 2014). A second one is that the combination of fading public policies and growing inequalities makes it difficult the implementation of carbon taxation systems and more sustainable housing, transportation and energy policies, for the limited capacity of public investment and the likely regressive effects (Gough *et al.* 2008; see the ‘Weitzman paradox’, Weitzman 1977). Another concern is that commodification, privatization and familization of service provision may weaken the State capability to promote more sustainable forms of service, consumption and work organization and governance, and to guarantee conditions of equal accessibility (Angelov and Johansson 2011; Bailey 2015; de Graaf and Sirovátka 2012; Jessop 2007; Sommestad 2012). Finally, while interesting experiences of many kinds of informal and self-organized local substantive economies are growing, it seems hard to see them as part of an improbable self-service society as a viable alternative to the institutional welfare (Accornero 2013; Reyneri 2017; Williams 2007; Jordan 2006).

3. Some scholars observe that making sustainable and effective a Socio-Eco-Investment State strategy, a move beyond the strict logic of SI is required, addressing the satisfaction of human needs within ecological limits (Gough 2014b; Harris 2008; Koch *et al.* 2016). Contributions, for instance, claim the “need to go beyond Keynesian and neo-classical economic theories and anchor the SI approach in a new economic model” (Morel *et al.* 2012) or more specifically deem essential to give-up the emphasis on employment-first policies, market competition and consumer sovereignty and the compulsion to increase competitiveness and productivity. Above all, some works acknowledge the idea of partly reconsidering the role of social policy with regard to the individual / social context / environment relationship, putting specific attention to the spatial dimension, the processes of rescaling and embeddedness of welfare operation, and the potentials of bottom-up non-institutional resources (Byrne 1998; Fitzpatrick 2011; Gough *et al.* 2008; Kazepov 2010; Koch 2013; Villa 2013). That means, for instance: first, challenging the classical BAU-short-term-national modes of welfare implementation and evaluation based upon national GDP and budget indicators per year, highlighting the need for more medium- and long-term and contextual arrangements and a more robust set of valuation techniques (Cnel and Istat 2014; Kulig *et al.* 2010; Lawn 2005). Second, addressing the problem of territorial divide, which makes the poorest at greater risk of being hit harder by the ongoing multiple phenomena of degradation and even by the same contrasting policies adopted (Gough *et al.* 2008). Third, promoting new equilibria between centralized universalistic frameworks and decentralized bottom-up processes of civic associations, policy community and cooperative governance (e.g. Bailey 2015; Catney and Doyle 2011; Jordan 2006). Fourth, enhancing the processes of informalization and decommodification of work and the reduction of working time while valorizing and supporting the reproductive work and promoting new forms of work-sharing (Asara *et al.* 2015; Bauhardt 2014; Bergh and Kallis 2012; Pullinger 2014; Williams 2007).

Accordingly to all these hypotheses, welfare institutions should search for new balance between investment, compensation and ecological limits, promoting more interdependent views of personal achievement and wellbeing, including collective and community-based investments and the organization of production and consumption in social policy goals (Jordan 2006 and 2010; Kennedy 2010; Koch *et al.* 2016; O’Riordan 2014).

4. Practicability of such hypotheses is however far from obvious, owing to many problems of costs/investments, complexity, timing, indeterminable outcomes and possible biases in targeting and involving people and territories (Esping-Andersen 2009). Indeed, they hardly can be seen as alternatives to the universalistic- or category-based social policy system, without the risk of further enhancing inequalities and undermining the legitimacy and enforceability of both universal basic needs and/or equal social rights for all (Gough 2014; Koch and Buch-Hansen 2016). They probably require further social and economic investment that risk to boost the tensions at the base of the mentioned dilemmas. And they certainly involve high levels of methodological complexity and require high management skills for supporting very complex governance and metagovernance processes and changes, while experimenting differentiated forms of power distribution, modes of inclusion and economic exchange, resource ownership (e.g. AA.VV 1996; Bacchella 2004; Botticchio *et al.*; Branca 1996; Bertocin and Pase 2006; Duquenne and Hadjou 2013; Governa and Saccomanni 2004; Jessop 2002 and 2007; Lewin 1951; Rei 2001; Ripamonti 2011; Villa 2010 and 2016; Whyte 1982).

5. As a matter of fact, in both the social policy and sustainability literature there is a still limited attention on theories, methods and practices helpful to make these hypotheses work. Social policy

research has brought a broad knowledge on a plethora of topics related to social risks, welfare regimes, policy instruments and patterns, and normative, institutional, functional and distributive designs and transformations. At the same time, it seems to struggle in grasping the contextual and organizational variables and dynamics, the interactions that involve feedback loops and cumulative change (Room 2011), and how these may concur both to create sustainability issues and to promote transformative opportunities. Indeed, there is little discussion on potentials and limits of more context-based social policies, their (in)equality implications and possible balancing mechanisms, and there is a very little shared knowledge on what it is possible to learn from past and present context-based practices and experiments (Bartels and Wittmayer 2014; Duquenne and Hadjou 2013; Governa and Saccomanni 2004; Matarrita-Cascante and Brennan 2012; Zanon 2014).

Furthermore, social policy research follows different perspectives but share a very little interest for the understanding of the living. It rarely claims inquiries in the world of things that in nature live, that is, grow, learn, evolve: the creaturely world of mental processes (Bateson, 1979). Human nature is commonly distilled in separate, disembodied and disembedded parts (variables, individuals, restricted spatial-temporal sequences of lineal actions) that even if helpful, equate life to abstract mechanisms (Thompson, 2007). Hence social policy research hardly includes any consideration of the ecological properties and implications of the relationships body-mind-environment and reason-emotion, of life forms and trajectories, of the learning and evolution processes of organizational / institutional designs. Rather, there is a steady commitment to simplification/reductionism in the operations of distinctions, mapping, comprehension and management of cognitive and social processes and environmental feedbacks (Bateson 1979; Byrne 1998; Spencer-Brown 1969; Vanderstraeten 2001; Weick 1995).

Therefore, there is an important growing attention on the matter as well as some reasons of dissatisfaction (Room 2011).

6. To take a step forward, I try to move between the folds of some of the above mentioned grand narratives with the aim of identifying some specific processes that make welfare systems more or less ecologically parasitical or, on the contrary, more or less capable of promoting better conditions for sustainability. The idea is to argue around the dynamic, organizational and contextual configurations of welfare systems, their changing strategies and their precarious equilibria in turbulent contexts. While taking the policy instruments into account, I mainly focus on how they contribute to the ecological properties of the interactions citizens-institutions-environment and their instituted processes, looking at the modes of self-organization and sense-making, the processes and structures of interdependence, embodiment and embeddedness, the types of learning, the non-linear processes of adaptation and co-evolution.

In particular, I try to explore the bottom-up and top-down dynamics that affect/create specific socio-ecological conditions, and their modes of dissipating/ preserving/ increasing the systems' economics of flexibility, that is their social, cognitive and bio-energetic uncommitted potentialities for change, learning, adaptation and development (Bateson 1972 and 1979; Eriksen 2005 and 2016). *First*, with regard to the modes of welfare organization, I critically analyze the prevailing economic and administrative rationales of managerial *modus operandi* (e.g. Capano 2003; Clarke and Newman 1997; Ferlie 1992; Flynn 200; Newman and Clarke 2013) and their tendency to rigidly program the policy implementation upon a few over-simplified assumptions. *Second*, with regard to the modes of social policy implementation, I examine some counter-intuitive effects of individualized and pre-structured - universalistic or category-based - policy measures (Kazepov 1999; Sabatinelli and Villa 2015; van

Berkel and Valkenbourg 2007), particularly in relation to the poor/fragile contexts and communities and among the people “who would benefit the greatest” (Esping-Andersen 2009).

On *both* these related issues, I use a series of fieldworks mainly targeted to social cohesion, inclusion and activation policies, and community organization projects, to show how, on the one hand, in the long run, specific habits, organizational patterns and mental structures are learned and reproduced (Argyris 1999; Klimecki e Laßleben 1999; Kickert 1993; Morgan 2006; Visser 2010), reinforcing kinds of instituted processes that risk to be at the same time socially ineffective, self-referential and ecologically parasitical (Bateson 1972; Eriksen 2016; Fitzpatrick 2011; Siebenhüner and Arnold 2007; Villa 2015 and 2016). For instance, by boosting the implementative processes around unproven simplified assumptions and monotone values, fostering schismogenic mechanisms of inclusion vs. exclusion, and of investment vs. deprivation, and flattening the contexts and life-trajectories diversities and their processes of multiple determination.

On the other hand, I discuss the transformative potentials towards sustainability emerging from the same case-studies. *First*, by including in the research process the actors experience and participation, their ways of dealing with ongoing issues and creating solutions, their learning processes and their theories on why they work or fail. *Second*, discussing how these processes are embedded, translated and contested and interact with top-down context-free policy mechanisms giving rise to sort of regime shifts and variations and trans-contextual differentiate framing of policy designs and sustainability effects (Avelino and Wittmayer 2015; Clarke et al. 2015; Room 2011; Villa 2016).

7. To this aim, I try to outline and test an *ecological perspective and style* (Tsoukas 2005) in social policy analysis which primarily refers to the socio-economic thinking springing from Karl Polanyi’s works, the complex-systems approach (particularly focusing on Gregory Bateson’s works) combined with the Russel’s theory of logical types, and some applications in the organization science (e.g. AA.VV 2000; Allen, Maguire, McKelvey 2011; Espinosa and Walker 2011; Morgan 1982 and 2006; Tsoukas 2005). I also adopt some non-reductionist basic assumptions on human nature and rationality drawing inspiration from cybernetics, formal sociology, sociology of emotion, mind science, ecological psychology (e.g. Bateson 1972; Damasio 2010; Hochschild 2012; Hoffmeyer 2008; Ingold 2011; Lewin 1951; Simmel 1908; Thompson 2007; Varela 1984, Von Foerster 2003, Winn 2002).

Here the problem of interdependence is considered constitutive for any object observed and it is meant as an *economic* problem of systems' communication, learning and evolution (Bateson 1972), according to the assumption that living organisms and men depend for their survival from the processes of interaction with their fellows and the nature (Polanyi 1968 and 1977). Interdependence is also a key-concept in the understanding of rationality, behaviors and collective dynamics, assuming that cognition, control and autonomy are not skull-bounded activities, social relations are not external-to-body phenomena (Thompson 2007), both are embedded in the environment and take part in the constitution of emotion, reason and rationality (Damasio, 2010), and all these contribute to the bio-energetic and socio-economic conditions of living systems (Jessop 2001).

Understanding of interdependence implies firstly a general argument, an a priori, in the modes of observation, that moves from the idea of a circular relationship between ontology and epistemology. As Bateson (1972 : 320) argues, “in the natural history of the living human being, ontology and epistemology cannot be separated”. They are in a sort of circular relation of which we are part, while “to suggest that they are separable” is incorrect and risks to make ourself particularly self-indulgent with our own tautologies, self-deceptive in our capability to self-validate them and be captured by their power of simplification and manipulation of the “real world”.

This translates into a *methodology* where the relationship between observer, observed and context, the operation of *observing*, is meant as an embedded, embodied and interdependent path of social construction and cognition that I try to actualize blending *pragmatist* observations - with particular regard to the role of *abduction* (See Peirce 1958 and Dewey 1938; see also e.g. Bateson 1979; Buchler 1939; Cooke 2006; Gallie 1965; Minnameier 2010; Paavola 2015; Plutynski 2011; Nubiola 2005; Reichertz 2004; Swedberg 2014) - with *systemic* analysis (e.g. Bateson 1979; Byrne 1998; Hoffmayer 2008; Kauffman 2001; and the invaluable contribution of Kurt Lewin, 1951 – See e.g. Burnes 2004; Adelman 1993).

Following the latter, I try to overcome the supposed limited usability of case-studies findings to the research field, moving between the extremes of the widespread universalistic totally context-free methods and the less common strictly contextually-bounded ones, and in-between the double risk of over-simplification and excessive complexification of the object of analysis (Hantrais 2006; Kennet 2006; Mabbet and Bolderson 1999, Saraceno 1999, Øyen 2006). In particular, by means of *action-research* methods (e.g. Brydon-Miller, Greenwood and Maguire 2003; Dewey 1938; Kemmis and McTaggart 2007; Lewin 1951; Stringer 2014), I make use of in-depth context-based, open-ended and participatory inquiries as part of an extended comparative investigation process: first, to produce multiple descriptions; second to identify hypotheses on regularities that can lead to the formation of abstract tautologies and subsequently to plausible patterns; third to compare similarities and differences. Tautologies are mainly organized in terms of multi-level typologies (or hierarchies of classified types; see Russel's theory of logical types; 1903) where the aim is not merely classifying objects through types and combinations of types, given that this operation is often unsatisfactory. Rather, qualitative case studies are addressed to observe and capture the processes generating the differences that we can summarize in the typologies (Bateson 1979).

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