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EDITORIAL/RESEARCH ARTICLE

CIVIL SOCIETY ACTORS AND THE WELFARE STATE
A historically-based analytical framework

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ABSTRACT: Civil society actors have always been crucial players in the development of welfare systems. Far before the appearance of the welfare state, the provision of services to those in need was the domain of charities and guilds, and later on of the mutual aid organizations related to the labour movement. Together with providing services, civil society actors have exerted political pressure on the state, demanding an enlargement of social rights or challenging the principles of public intervention. Such a relevant role became even more pivotal after the '70s, when the welfare mix model paved the way for the entrance of third sector organizations into public service provision and governance processes. Within this scenario, this article aims to develop a historically-based conceptual framework, through which the huge heterogeneity of civil society actors and functions can be analyzed. The possibility of performing several roles represents an opportunity for civil society actors, but at the same times engenders contradictions and trade-offs for social movements and the third sector.

KEYWORDS: Third sector, social movements, welfare systems, civil society, contentious politics, service providing.

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1. Introduction

Since the end of the 1970s, major shifts have occurred in the relationship between the welfare state and civil society actors (CSAs) in many European countries. Structural changes in socio-economic, demographic and cultural spheres, such as the spread of new modes of production subsequent to deep economic restructuring processes, an ageing population and fluctuating expectations due to individualisation and changing life patterns have undermined the functioning of welfare institutions and contributed to the fiscal crisis of the state (Amin et al. 2002). Consequently, European welfare states have gone through a process of recalibration that has restrained the growth of public social expenditure and resulted in retrenchment. This process has occurred in tandem with the adoption of the New Public Management agenda in the restructuring of public administration and management in many European countries, mainly based on market-oriented strategies (e.g. competitive contracting for services; public-private partnerships; output and customer orientation). In this frame, governance has emerged as the new governing style in which the boundaries between public and private actors have become increasingly blurred (Stoker 1998).

All these processes have marked the transition from the welfare state to the welfare mix, leading to a new role for civil-society-based initiatives (Ascoli and Ranci 2002). CSAs have become increasingly crucial players in the production and delivery of social provisions in sectors such as social care, health, housing and education (especially at local level), performing functions that neither the state nor the market accomplish (Weisbrod 2000).

This growing role for CSAs has favoured a revival of interest, after a long period of abeyance, in the relationship between civil society and welfare state. Salamon and Anheier (1997, 63) have described the extraordinary increase in these initiatives as a "global associational revolution". Others scholars, in turn, have positioned civil society at the centre of a so-called "welfare triangle" (Evers, 1993; Evers and Laville 2004), a term that highlights the plural nature of the actors and resources that contribute to social welfare, recognising the role of CSAs alongside that of the state (public agencies), the market (private firms) and the community (households and families).

However, considering the crucial role of CSAs in contemporary welfare provision as an unprecedented phenomenon would be misleading. As we will show in the third section, in reference to what has been happening in the last few decades, it would be better to speak about a *rediscovery*, rather than a *discovery*, of civil society in the field of welfare. No understanding of welfare origin and development could really be complete without a full appreciation of the role played by CSAs in different sectors in different

periods. Over the course of the sixteenth to the eighteenth century, welfare provisions remained the domain of religious organisations, charities and guilds in many European countries. Since the nineteenth century, during the industrialisation period, the emerging labour movement also played an influential role. A vast network of mutual-aid associations and labour and social movements dealt with the social question caused by the problem of integrating the emerging industrial workers by delivering welfare provision in relation to the needs of their constituencies outside of the existing socio-economic and political order.

The relationship between civil society and the welfare state has also been characterised by the role played by a large array of voluntary associations and private foundations in service delivery, as well as by social movement mobilisation focusing on "provision of housing, monetary or 'welfare' benefits, education and health and all manner of social and public policies and services" (Barker and Lavalette 2015, 711).

Thus, although civil society is often represented as a homogeneous actor, it actually looks like "no more than a cover term for a heterogeneous collection of organisations and initiatives with different roles and functions in a changing context" (Brandsen et al. 2017, 677)[1]. Their activities in the field of welfare can be charted on a continuum from self-organised forms of service provision, free in some cases from both state interference and market principles, to direct action and advocacy, often outside existing institutional channels, targeting state authorities and making claims for social rights.

Scholars have claimed that there has been nothing inevitable in the origin and development of the Welfare state. It could indeed be understood as the result of a dynamic of contentious politics in which the role of CSAs in politicising issues and needs that were once considered of private concern (i.e. old age, sickness and unemployment) and thus claiming them for private solutions, has been essential, although often undervalued in academic literature[2].

Instead, compared to the past, what certainly turned out to be a new element during the last decades of the twentieth century is the insistence with which, in public debate, the engagement of CSAs as service providers in the development and implemen-

[1] In this perspective, civil society indicates a social space placed between the state, the market and the community, in which people voluntarily take part in associations and undertake collective actions for normative and substantive purposes (Walzer, 1998; Edwards, 2009).

[2] After the Second World War, CSAs also played a crucial role in the politicization of many issues once considered moral questions such as sexuality, gender and family roles, race and disability. At stake in the relationship between CSAs and welfare state, there are not only social problems and needs and the resources to answer them, but also - to resume the perspective of Nancy Fraser (1989) - "the discourse on these needs, their interpretations, the conflicts and the powers on their definition and recognition" (de Leonardis 1998, 38).

tation of welfare provision is portrayed as a good solution, the panacea of all social problems. In other words, regardless of whether this insistence is ideologically driven or based on the rationale of financial austerity, civil society is often described as "the magic ingredient that might correct generations of state and market 'failure' and resolve the tension between social cohesion and capitalism" (Edwards, (2012, 5)[3].

This optimistic approach towards civil society has been supported by the many efforts that governments, at both national and local levels, put into the involvement of community and non-profit organisations in public-private partnerships, generally through top-down participatory practices, in dealing with contemporary social issues in a frame of budgetary constraints[4]. However, this approach has ended up focusing only on a specific category of heterogeneous actors belonging to civil society, those characterised by a high level of formality in terms of legal registration, involved in partnerships with local governments and other agencies and dependent to various degrees on external and public funds. This is evident in public debate, in which terms such as *third sector*, *non-profit sector* and *social economy* often take the place of *civil society*. The result has also been the replacement of CSAs' transformative potential by arguments about the crucial nature of their economic role in providing social care and services on a not-for-profit basis.

In this context, CSAs struggle to express their transformative potential in the collective actions they organise, blending in various and changing ways their persistent and different roles, such as service delivery, advocacy and community organising. The resulting tension is not a novelty. It has for instance often accompanied the experiences of mutual-aid organisations conceived within civil society during the second half of the nineteenth century. Self-organization, indeed, has been understood - and therefore criticized – as an unintended way to offer a "crutch" to an increasingly diminishing welfare state by substituting public service provision with practices from below. From this perspective, self-help and mutualism become alternative, rather than complementary, to practices of contestation and claims for rights. In other words, the scenario created by the transition to the welfare-mix has generated a field of tension for CSAs. On the one hand, the contracting-out of public services and the expansion of the welfare quasi-market have set the conditions for the considerable growth of a specific category of

[3] According to Brandsen and colleagues (2017, 679), "a large collection of buzzwords accompanies this resurrection of the civil society discourse: social responsibility, citizenship, big society, activation, participation, horizontalisation, to name only a few".

[4] Although the policy implementation obviously diverge, civil society involvement in welfare provision has been the hearth of many governments' welfare programs in the European countries, regardless of their political orientations.

association, namely the non-profit actors. On the other hand, the social and political transformative potential of CSAs with respect to the socio-economic system in which they operate - inherited from the experiences of mutualism and labour movements of the mid and late nineteenth century – has progressively vanished. A conflictual view of civil society has been replaced by neutral and "sterilizing" representations, converging towards an uncritical and benevolent attitude. As service providers, moreover, CSAs often face pressure to adopt market-oriented strategies that strongly shape their independence and their "potential to act as a force for structural or systemic change" (Edwards, 2012, 5). In this way, many agencies "may worry that advocacy will have a deleterious effects on their relationships with government, including future funding and regulatory decisions" (Smith 2012, 37).

This trend, however, currently runs parallel to an inverse dynamic that seems to have received an important boost from the economic and financial crises (Kousis and Paschou 2017; Bosi e Zamponi 2015; Giugni and Grasso 2016; Loukakis 2018; Zamponi and Bosi 2018). The austerity policies and welfare retrenchment that followed the 2008 crash have stimulated a new season of collective action which, both inside and outside institutions, advocates greater welfare protection and social rights. The recent increase in direct provision of self-managed welfare services related to the spreading demand for material and immaterial goods (e.g. food, housing, health, education, work) has often taken shape far from the institutional arena, renewing the spirit of earlier mutual-aid practices and combining the development of solidarity practices with a strong political transformative attitude. These experiences often propose a radical critique of the social assistance model, representing welfare recipients less as carriers of problems than as active subjects endowed with resources for their own solutions.

In order to understand the ways in which CSAs have expressed their transformative potential, blending their roles as social providers and/or challengers, the next section provides an analysis aimed at showing that the whole development of welfare should be better read in terms of coexistence, cooperation and contention between state and civil society, rather than as a history of "replacement" of civil society initiatives by the public system.

Starting from this perspective, the third section will examine the historical narrative of the role of CSAs in the origins and development of welfare, paying attention to two analytical dimensions – the functions played by CSAs and the kind of relationships developed with government and other actors in the welfare mix. Moving from these dimensions, the fourth section will define an analytical framework in which contemporary CSAs may be positioned, taking into consideration opportunities, changes and trade-offs linked to various roles and trajectories. Such a conceptual space acts as a

framework for the ten articles, presented in the fifth, conclusive, section, that make up this special issue.

2. Civil society as an autonomous locus of social protection

In social sciences, there is a continuous and often confused debate about what civil society represents and what its potential is. According to many scholars, indeed, civil society is probably one of the most contested concepts in academic and public debate. It is generally used in a reductive way, as a homogeneous artefact that should represent the same thing in every context. Edwards (2012, 7), on the contrary, has taken into consideration the heterogeneity of CSAs, arguing that they "cover a huge range of entities of different types, sizes, purposes, and levels of formality, including community or grassroots associations, social movements, labor unions, professional groups, advocacy and development NGOs, formally registered non-profits, social enterprises, and many others".

Moreover, the afore-mentioned reductive approach is often accompanied by an unreflective attitude based on the assumption that there is a "mechanical relationship" between specific associative practices (such as the creation of formal and informal spaces in which people can practice civic engagement), the generation of cooperative social networks (or social capital) and more effective governance of social issues and welfare provision. On the contrary, scholars have shown that the relationship between CSAs and effective welfare provision is neither obvious nor straightforward. This is partly due – as mentioned above – to the vastly different ways of conceptualising civil society, but also to the various public and private actors that intervene in shaping this relationship. Starting from these considerations, in this section, we will develop an analytical perspective to understand the role of CSAs as an autonomous locus of welfare and the relationship with other agencies in the so-called welfare triangle.

The conventional history of welfare provision has often been portrayed as "a smooth progression from charity and philanthropy to state provision, reaching its perfect form in the mid-twentieth century" (Deakin 2001, 25). This narrative is based on an unexpressed teleological belief according to which the development and progress of welfare provisions are linear and lead by the increasing role of the state in the protection and promotion of the social and economic well-being of its citizens. Specifically, a very popular and well-established hypothesis presents the origins of the modern welfare state as the compulsory social insurance schemes introduced by Bismarck in Germany during the 1880s for sickness (1883), accidents at work (1884), old age and invalidity

insurance (1889). These schemes initially experienced a slow expansion in other European countries until the end of the nineteenth century, while in the first decades of the twentieth there was a rapid extension of various social insurance programmes in most European and some American countries, with expansion in benefits and coverage of the population (Flora and Alber 1981).

Periodization is always problematic. The compulsory insurance schemes launched by Bismarck undoubtedly introduced a real institutional breakthrough in the history of the European nation-state. They are considered the 'take-off' of welfare state development in Western Europe (1880-1914), while the earlier period (1600-1880) is generally labelled as the 'prehistory' (Heclo 1974; Alber 1982; Ewald 1986). According to Rimlinger (1974, 3), the main difference concerned the "shift from a deterrent system that furnished relief based on need to a system that furnished benefits as a matter of right".

However, the 'take-off' of the welfare state did not just appear out of nowhere. First and foremost, insurance schemes took up many essential elements of the previous forms of social protection, such as the early types of mutual-aid offered by the guilds and craft leagues of Medieval Europe, whose main aim was to support their associated members by maintaining their welfare, and employers' obligation to assure protection to their servants/workers. Yet unlike insurance schemes, they were small, limited to guild members, and not based on the discretion of the paternalistic principle inspiring the special responsibility of the employer during the feudal period. Secondly, some national governments had already become involved in welfare provisions before the enactment of the 1880s social insurance schemes. This was primarily through laws concerning the rising problem of poverty, setting up a relief system based on the key role of local communities and parishes in a general framework of restriction and repression. The poor relief systems set up in some European countries by government administrations before the 'take-off' of the welfare state are important to consider not simply because of their existence, but because they also drafted some basic features which would subsequently become public social policy standards. Indeed, they put forward a definition of the problem (poverty) and gave rise to "powerful norms about who was deserving of aid, the forms of aid that should be given, which public and private institutions and organizations should provide aid, and why" (Jensen 2015, 23). Thirdly, scholars claim that the development and implementation of social insurance were shaped by the various characteristics and roles of associative and voluntary forms of social pro-

tection in the particular countries, with specific reference to mutual-aid organizations, friendly Societies and other similar associations[5].

The standard history of welfare provision is misleading because it not only underestimates the role of the state before the introduction of the social insurance schemes, but also the fact that the state was only one of the formal and informal agencies involved in welfare activity. Scholars have challenged such a teleological interpretation of the origin and development of welfare based on the role of the State (Orloff 1996; Lister 1997; Lewis 1998; Sainsbury 1999). Focus has been placed on the diversity of agencies involved in collective solutions to social problems, highlighting not only that the state was only one of the agencies involved, but also that "for much of the nineteenth and even the twentieth century, it was not the most important" and that the rationale of its activities changed (Finlayson 1994, 6). In this perspective, Jane Lewis (1999, 249) argues that it would be more appropriate to analyse the origin and development of collective welfare provisions as the result of "a mixed economy of welfare, in which the state, the voluntary sector, the family and the market have played different parts at different points in time".

Indeed, families, village and neighbourhood relationships, voluntary organisations and charities all had a substantial role in offering direct welfare provisions for children, the sick, the disabled and the elderly, compensating in many cases for the lack of other actors.

The welfare-mix perspective has the merit of highlighting the fact that welfare is the outcome of the actions of a vast constellation of actors, formal and informal, private and public. However, none of the actors operate in a vacuum. Their activities cannot be seen as separate from the whole welfare system in which they are embedded, and they contribute to producing changes, cooperating or conflicting with the other actors involved.

As a matter of fact, the relationship between CSAs such as voluntary organisations, charities, social movements and grassroots associations and the others actors in welfare provision, in particular state and local authorities, has always been ambivalent. Scholars have often agreed with an understanding of CSAs activities in welfare provisions as a voluntary engagement in non-political forms of association (Walker 2013). However, such a perspective can be misleading. Indeed, "social policies involve the dimensions of justice and values and are therefore intrinsically political objects" (Busso, 2017, 422). In this regards, Deakin (2001) uses the concept of "borderlands" to indicate

[5] For instance, while in Germany the introduction of social insurance during the 1880s relied on the still-active structure of social protection based on the guilds, in England the incorporation of the network of friendly societies was only possible for health insurance schemes (Hennock, 2007; Paci, 1987).

the *place* where civil society's welfare activities meet those of actors based in the sphere of the state and market. In these "borderlands", not only collaboration but also conflict occurred. In other words, the various organized CSAs establish an autonomous locus of social protection, playing a key role through collective self-provision and self-organized forms of welfare, free from both state or market interference. However, while acting as welfare service providers, they are also involved as challengers, politicizing issues that were regarded as private, pursuing political ends, opposing specific service delivery, advocating social and political values, seeking change in institutional welfare contexts, and often entering into conflictual relationships with state and local administrations (Eliasoph 2013). Borrowing the concept coined by Tilly (2004), the well-known social movement scholar, "borderlands" may be also understood as "zones of contentious politics". They are "contentious because the claims that are made will come into conflict with the interests of some other groups; politics because some appeal is made to or role is expected of government" (Annetts et al., 2009, 8).

3. Civil society in welfare systems. A historical perspective

It is well known that in preindustrial societies, households and neighbourhood networks played a key role in welfare provision, substantially internalizing the cost of social and economic insecurity. According to Rimlinger (1971, 149), "a production process based on peasant and artisan households provided for the cost of maintaining the household over its life cycle". A key role in the care of "the poor" – namely the orphaned, the old/sick and widows with children, the so-called impotent poor, traditionally regarded as meriting help – was also played by an array of agencies such as religious institutions or private charities. However, until the second half of the sixteenth century, "there had been no co-ordination and little activity by the state, aside from legislation regulating labour and punishing beggars and vagrants" (Slack 1990, 14). In a few European regions, craft guilds also existed in this period, even if these organizations, rather than contributing to the relief of the poorest members of the community, mostly acted in response to "physical infirmities brought on by ageing or accidents that deprived one of their members of the ability to labour" (Patriquin 2007, 90).

From the sixteenth to the late eighteenth century, European regions experienced profound changes in local demographic, economic and social structures and the resulting process of rural depopulation threatened traditional support systems based on kinship, social neighbourhood relationships and traditional economic interactions. A long-term period of transition took place everywhere, although with variations and different

intensity. Populations became more vulnerable to economic hardship in many countries, and household and private charities revealed their mounting inadequacy, as did the guilds of the corporatist system. In this socio-economic context, national governments took responsibility in the field of welfare, especially concerning the treatment of poverty (Dean 1992). Even if there was increasing government interference before the seventeenth century, the most important attempt to set up a public intervention system based on centralisation and uniformity emerged progressively in England, with the well-known Elizabethan Act for the Relief of the Poor (Elizabeth I's Poor Law of 1597-1601). Elsewhere in Europe, other experiences emerged later. Unlike England, however, these state intervention initiatives lead to a poor relief system much more dependent on local initiative, with much greater development in urban contexts that in the countryside, displaying greater diversity in their organization, in the actors involved and in their benefits.

State intervention did not modify the role of the kinship, charitable and religious networks in any substantial way. Rather, it acted as an addition to the traditional social provision system, recognising the fundamental functions of household charities and parishes at the local level. At least up to the early nineteenth century, indeed, relief for the poor was mostly provided by the local parish organisations, converted into a so-called "unit of administration" (Patriquin 2007) sustained by a local tax. This required those who could not support themselves to return to the parish of their birth, rather than wandering the country. The main aims of these measures were not to offer public assistance to the needy, but rather to control people displaced from the land, exercise a sharp demarcation between deserving and undeserving poor, and, through an organised system of repression, avoid the large deracinated numbers of peasants becoming beggars and vagabonds.

From the early nineteenth century onwards, the spread of industrialisation and the processes of proletarisation, urbanization and internal migration led to decisive changes in social organization and substantial modifications to the forms of welfare provision and to the relationships between the various actors. A new formulation of the "social question" arose in this period from the industrialization process, no longer concerning mainly the "government of the poor", but rather the integration of the rising population dependent on wage labour for survival into the contemporary social and political order (Castel 2003). Becoming a wage labourer meant falling into a dangerous condition, a condition of extreme vulnerability due to the structural precariousness of the work on the one hand, and the weakening of the traditional networks of social protection on the other. In other words, industrialisation raised the twin issues of the disaffiliation of the masses and the integration of the emerging working classes: "at the mo-

ment when free wage-labour becomes the legally sanctioned form of the labour relationship, the condition of wage-labour remains still, and for long afterwards, associated with precariousness and misery" (Castel 2003, xix).

In opposition to these changes, revolt and social unrest, even if pre-existing, rose significantly, both in agricultural and urban areas. According to Rudé (1995, 135-138), the main features of these forms of popular protest were i) the use of direct-action methods and violence to property, ii) the spontaneity of their origins and development, and iii) the variable social composition of the protesters, depending on the place where it occurred: "in villages, they were smallholders, cottagers, miners and weavers, […]. In towns, there would be more of a mixture; wage-earners, labourers, servants and apprentices, but also tradesmen, craftsmen and the occasional gentleman". Moreover, it is important to emphasize the aim of these popular protests: the emerging popular class strove to maintain its customary pre-existent social rights. In their competent and influential analysis of the labourer movement of the British "Swing Riots" in the first decades of the nineteenth century, Hobsbawm and Rudé (1969, 43) highlight the fact that "the object of these movements was not revolutionary. Their immediate purpose was economic […], the almost universal demand was for higher wages, for better employment and/or for improvements in the system of social security (i.e. the Poor Laws) […], and perhaps until 1834-35, behind these immediate and virtually (though not formally) trade unionist demands, there was a wider objective: […] the restoration of the stable social order which had – at least so it seemed in retrospect – guaranteed them"[6].

The emerging social relations of capitalism also led to vigorous efforts by the labourer classes to protect both their communities and their interests at work. Several examples of mutual-aid associations were already active in England from the early seventeenth century, even if they started to develop more intensively in the second half of the nineteenth century all over Europe.

The first mutual-aid associations, such as the working men's clubs and the Friendly Societies, had especially important social functions, based on forms of mutual solidarity, and their organisation was democratic in nature. The mutual-aid principle established that the members signed an agreement that provided for the periodic payment of allowances, which were set aside and used to offer members help with the costs of

[6] Thompson supported the image of a traditional and apolitical ideology in the popular protests of the early nineteenth century as well, calling it a "rebellious culture". In particular, he emphasized the fact that "plebeian culture is rebellious, but rebellious in defence of custom… [and] when the people search for legitimations for protest, they often turn back to the paternalist regulations of a more authoritarian society".

funerals, provide a life annuity after a certain age limit and support them in facing social risks such as illness, work accidents or unemployment. However, fund raising, through contributions, membership fees and donations, was not a strictly planned activity, and the administration and supply of services and funds to their members was largely discretionary. Moreover, the organisational structure of these associations was initially weak, also because public order legislation in many countries forbade a high number of members or the accumulation of funds. In particular, the Friendly Societies were known for having social and welfare functions that brought back several elements of the previous traditional associations of reciprocal support in preindustrial Western European societies. Indeed, these associations also stood out for sustaining the achievement of political aims, running campaigns in favour of an enlargement of civil and political rights.

Until the 1820s, they acted as a semi-clandestine regime. Indeed, the fear that they could become vehicles for spreading revolutionary contamination among the labourer classes pushed the English ruling class to adopt several measures harshly restricting the right to freedom of association. After the abolition of the laws that prevented freedom of association (1824), a vast network of organizations based on self-help and mutual-aid practices spread, especially in the regions where industrialization was most marked, supporting an emerging process of politicization and in particular addressing the working conditions of the rising population dependent on wage labour.

What then happened was ambivalent. On the one hand, the English ruling class passed a reformist fabric legislation, limiting the work of women and young people and bringing some improvement in the working conditions of wage labourers in factories. On the other hand, a strict restriction of the right to parish relief was adopted (the Poor Law Amendment Act of 1834)[7], leading to a strong decline in the number of able-bodied men receiving outdoor relief and a significant decrease in the overall level of state expenditure, strengthening the belief that aid to the poor should be kept to a minimum, and that they should be encouraged to work (Hopkins 2000).

Over the second half of the nineteenth century, mutual-aid associations also developed in various European countries, particularly linked to the parallel development of the labourers' movements, to which they made a fundamental contribution, thus becoming the largest working class organisations of the period. The further decline of the traditional forms of welfare provision led many working-class mutual-aid associations

[7] For this reason, this reform was also seen by Polanyi (1974, 84) as "the starting point of modern capitalism". It was indeed an important contributing factor in the eradication of obstacles to the emerging capitalist social relations and the logic of the labour market based on the cash-nexus criteria, ending "the rule of the benevolent landlord and his allowance system".

to adopt a *multifunctional attitude*. The conviviality aspect of their activities was joined by more manifest welfare provision initiatives, ranging from giving urgent aid to members facing serious difficulties to insurance against sickness, from promoting (basic) medical care to educational opportunities and house-building through the development of co-operatives. By the end of the nineteenth century, these associations became in many cases *de facto* trade unions, increasing their power and their threat to the ruling class. Initially designed to maintain and safeguard conditions at work, trade unions also became another expression of welfare from below, in many cases offering the same benefits as mutual-aid associations, and later leading to working-class representation in parliament with Labour, Socialist and Catholic parties.

Following a process of functional differentiation, the large network of self-help and mutual-aid associations boosted the development of co-operatives and specialised organisations such as saving banks, building societies, childcare facilities and schools, vocational training institutions and employment and placement services. Co-operatives, in particular, expanded greatly from the 1850s onwards, becoming an economic organisation based on common ownership and – as with mutual-aid societies – horizontal rather than hierarchical administration, aimed both at defending wage-labourers from speculation on the prices of consumer goods (co-operatives stores) and at promoting employment opportunities (workers' production cooperatives). Based on direct forms of participation by producers and users, they had a profound political impact on labourers' lives and working conditions, providing their members not only with benefits either previously unavailable or too expensive, but also with job opportunities.

This was also made possible by reforms in legislation in various European countries. The approach of governments towards mutual-aid societies was equivocal over the course of time, depending on whether they were considered a threat or a reinforcement of the established order. Generally, the emerging approach of self-help and mutual-aid among labourer movements was encouraged by governments and the ruling class because it corresponded to their belief in free trade and *laissez-faire* as a way of limiting not only the costs of public relief, but also popular protests and strikes. However, some concerns about their possible role in seditious activities during emerging social unrest were increasingly raised, and local authorities and national governments often condemned them as providers of a setting for plotting and even preparing seditious acts, like a disguised trade union.

The purpose of the mutual aid afforded by these associations was definitely aimed more at addressing the emerging problems in the sphere of reproduction than of production. In other words, the practice of mutual-aid activities gave birth to an *associationism for* rather than an *associationism against* the working conditions and wages of

the emerging working-class (Ferraris 2011, 24). Nevertheless, it would be misleading to put mutual-aid and conflictual/resistant associations such as trade unions in opposition to each other. In fact, the former were a crucial experience in the long journey towards the establishment of a contentious working-class identity.

Civil society and labour movements' efforts to provide welfare through their own activities and resources – i.e. welfare from below – carried on after state-run social insurance schemes for specific occupational groups appeared in several European countries in the late nineteenth and early twentieth century. While most welfare scholars moved their attention to the role of the state in welfare provisions, welfare from below continued to be crucial for a long time, even if such associations were often only joined by an almost exclusively well-organized and more skilled male working class[8].

However, it is true that in this period a major shift occurred in state intervention in the field of welfare provisions. With the development of social insurance, by means of Bismarck's schemes for sickness (1883), accident (1884), and old age and invalidity insurance (1889), the state became involved in welfare provision to an unprecedented degree[9]. Undoubtedly, it was a radical alternative to the faith in the capacity of both the market (*laissez-faire*) and society, with its voluntary associations and mutual-aid societies, to protect itself against poverty and economic hardship. The Reich government initiative in the sphere of welfare was also a noticeable watershed in reacting to the growing political mobilization of workers and their demands for emancipation, ending the traditional policy of repression adopted thus far in almost all European countries. Focusing in particular on the question of how worker loyalty towards the imperial regime and its ruling class could be secured, Bismarck opted for an "authoritarian integration strategy" (Rapini 2010, 21). Indeed, on the one hand, he broke with the poor-law rationale and – in the words of Thomas Marshall (1950) – introduced unprecedented elements of social citizenship based on the state as a provider and protector of social rights, though granted only through participation in the labour market. However, on the other hand, he reduced political citizenship rights, renewing the ban on public activities by the Social Democrat Party (which became the dominant radical political force in German industrial areas during the 1870s) and trade unions.

This model of social insurance relied on the numerous pre-existing German mutual organisations, in turn based on pre-liberal guild regulations. It not only took a contribu-

[8] Few mutual-aid societies gave access to both men and women. According to Thane (1982, 28), "this was partly because few labouring families, even among the better paid, could afford double contributions, and in such families the needs of the man took priority".

[9] de Swaan, for instance, argues that the introduction of social insurance is "comparable in significance to the introduction of representative democracy' (1988, 149).

tory and compulsory form, limited mainly to the better-off factory workers, but it also aimed at building institutional cooperation in the financing and management of public social insurance among three partners: employers, employees and the state.

Only a few European countries followed the German example in the years immediately afterwards, although social insurance schemes based on the principle of state-control were indeed introduced into the legislation of many Western European countries from the early twentieth century and increasingly after World War I.

According to scholars, German social legislation was a typical case for observing the importance that the rise of the industrial working-class and its growing strength in civil society had on the beginnings of the welfare state. However, the labour movement's growing strength and ruling-class fear were not the only decisive factors in shaping the origins of the welfare state in Germany or in other state welfare initiatives. On the contrary, as Kuhnle and Sander (2010, 67) argue, "social policies were introduced with different motivations in different places and the various factors have carried different weight in different periods".

Moreover, as many scholars have discussed in relation to the German case, the Social Democrat Party (SPD), as well as other working-class political organisations, did not support Bismarck's welfare measures, expressing a deep-rooted preference for independence from the state – seen as an institution acting on behalf of the upper class – and welfare from below though self-help and mutual-aid organisations. As Thane (1982, 101) points out, the SPD "shared with other socialist parties affiliated to the Marxist Second International a suspicion of government-sponsored welfare". Social reforms were seen by labour movement organisations less as an instrument "to improve the material circumstances of the labouring poor" and more as an attempt "to prevent their organizing the struggle for greater and permanent improvement and elimination of their material and political repression".

Also in England, labour organisations initially opposed the emergence of state intervention in welfare provisions. However, the main resistance did not came from the Labour party – only founded in the early twentieth century – but from Friendly Societies, the largest working-class organisations, counting over half of the adult male population at the end of the nineteenth century, much higher than Union membership. This also shows, as Kuhnle and Sander (2010, 67) highlight, that "the prevalence of alternative welfare providers at the time of the birth of national social insurance helps to explain the paradox of the relative lateness of welfare state development in more affluent and more democratic nations".

The social insurance schemes for old-age pensions, health and unemployment introduced in England by the Liberals between 1908 and 1911 showed some substantial dif-

ferences from the German ones. The principle of state-controlled, contributory, and compulsory insurance was introduced not *against*, but taking strongly *into account* the interests of the working-class and labour movement organisations. However, scholars argue that this does not mean that English social legislation was mainly shaped by pressure from below or that the Liberal government – like the German political elite – aimed to limit the capacity of mobilisation of the labour movement (Pelling 1987). In fact, since the Labour Party was not considered a revolutionary threat, social legislation was mainly "a result of the older-established parties competing for the working-class vote" (Ritter 1983, 173).

The Liberal social reform policy introduced two main variations from the German example. First of all, the right to a pension was not entirely dependent on workers' adequate contributions. The contractual logic introduced in Germany – even if did not threaten the market logic so dear to the England ruling class – was publicly contested because it was mainly aimed at skilled and better-off workers. Secondly, through the National Insurance Act of 1911, the Liberal English government introduced the world's first compulsory unemployment insurance for certain groups of workers, a measure not adopted by Germany until the Weimar Republic. This marked a clear break with *laissez-faire* ideology.

Social insurance, therefore, definitely became a core element of the nation state's functions, increasingly broadening the area of intervention to other social issues, such as public health, education, housing, worker protection, and family and child support.

Before World War I, welfare provision was a major concern for European countries, becoming an essential part of party politics and government policies. Almost everywhere, the introduction of social insurance by the state went hand in hand with labour movement pressure and struggles for welfare. However, the relationship between labour movement activity and the introduction of state welfare provisions was not straightforward. Different factors intervened in shaping the development of the welfare state regarding timing, principles and scope. First of all, labour movements did not have a systematic and articulate programme in the field of welfare. Their mobilisations and struggles were oriented more around the issues of prices and wages while founded and managed mutual-aid organisations as autonomous sources of welfare provisions, retaining independence from the state. Secondly, labour movements were often divided over social legislations discussed and adopted in the various European countries. As concerns, for instance, the developing of social insurance in England, strongly opposition came from Friendly Societies and the more anti-state, anti-party and anti-parliamentary leanings of Britain's labour organisations, while the Labour party and trade unions had more than a marginal role in supporting the scheme.

In the thirty years after World War II, state welfare intervention expanded both in terms of the scope of risks and the coverage of population and also through an increase in compulsory provision (Flora and Alber 1981), thanks to a historical class compromise based on an institutional framework of collaboration between state, labour and capital. This institutional framework spread to almost all Western countries, albeit to different extents, becoming the basis of the emerging *corporatism* of public policy-making by which capital and labour, but also the state and civil society, had their respective mechanisms and spaces of action, such as collective bargaining, party competition and representative party government, for resolving social and political conflict. In this way, the welfare state developed much more rapidly than before, as did "the belief in the capacity of the state to do public good" (Crouch 2001, 114). However, conflict over welfare policy did not disappear. Probably the most relevant difference from the previous period was that the labour movement focused its struggle on the strategic role of the state, viewing it as the instrument for income distribution and social security. In other words, "the welfare state […] served as the major peace formula of advanced capitalist democracies" (Offe 1984, 147).

However, although the challenge of labour movements were in that period progressively institutionalized into formal political and mass-based organizations, a new wave of CSAs and social movement struggles flourished in the majority of Western countries, especially during the Sixties. These protest waves, while varying significantly in their demands, revealed contradictions and gaps in the welfare state and the emergence of new demands from various social groups (in which young women and immigrants played a major role) which could no longer be worked out by political regulation and bureaucratic administration.

Women's movements, welfare rights movements and anti-racist movements denounced the underlying logic of patriarchy and racism that marked post-war welfare settlements, affected by strong gender and racist biases. The feminist movement struggled with the explicit assumptions of the so-called male breadwinner model underlying post-war welfare state arrangements, according to which married women were not only dependent on male wage earners, but also responsible for providing care and welfare services to family members. Immigrants, in turn, opposed discrimination in accessing the labour market and well-paid jobs, as well as housing and social services. Their space of action was mainly non-institutional politics and their claims concerned not merely basic material needs, but more especially rights for the so-called minorities (abortion rights, disability rights, nursery provision, domestic violence shelters, and gay and lesbian rights), greater democracy and stronger decision-making power, developing self-help practical experiments as an alternative to bureaucratic

welfare provisions. According to Ginsborg (1990, 323), "it was in civil society… that radical alternatives spread most rapidly: "red" markets, kindergartens, restaurants, surgeries, social clubs, etc. opened (and often shut) one after another. Their aim was to organise social life along quite different lines". Together with these claims, the feminist movement in particular acted as a vehicle of politicization, asking for a redefinition of what should be considered "public" – and hence political – to include many issues, mainly concerned with care, that were relegated to the realm of "private", and therefore disregarded by policy makers (Fraser 1990).

Social movements and CSAs' protests, as well as growing working class resistance to the Fordist accumulation regime, weakened the legitimacy of the so-called Keynesian paradigm (Jessop 1991), which was hit hard by the socio-economic changes. The main features of the transition that took place starting from the end of the '70s are well known[10]. The mix of full employment and welfare provisions that created the equilibrium during the post-war period was shaken by the slowdown of economic growth, undermining the foundation of the social and economic order and the premises for a strong role of the state. The expansion of Keynesian welfare, indeed, caused an increase in social expenditure that was no longer compensated by the growth of tax revenues, boosting public deficit and leading to the so-called fiscal crisis. Moreover, the insurance-based welfare systems proved to be unable to respond to the new social demand that characterized post-Fordism, caused by the increasing flexibility of the labour market and by the diffusion of dual-earner families that replaced the sole male breadwinner.

The "neoliberal turn" that followed this crisis had profound implications for CSAs, both in terms of their relevance and their role. The dismantling – or at least the downsizing – of the welfare system, in fact, was a key element in pursuing the goal of a "lean state", and civil society came to play a pivotal role in this political project. With the purpose of reducing public expenditure, a complex system was developed consisting of various economic strategies, often summarized with the broad label of "privatization" (Savas 2005). The replacement of the welfare state with a "welfare mix" model that occurred in those years had two main subsequent steps (Ascoli and Ranci 2002). The first was marked by a strong steering role of the state, which devoted many functions to non-public actors through outsourcing, while maintaining a relevant regulatory power and funding function. In such a model, defined by Wolch (1989) as "shadow state", contracting out to civil society and enterprises became the main way to reduce ex-

[10] For a more detailed analysis, see Morel, Palier and Palme (2012), Wagenaar and van del Hejden (2015), Amin et al 2002.

penditure without giving up public policy goals. A subsequent stage was that of "shared government" (Franz 1991), in which CSAs ceased to be merely providers and acquired a relevant role in the governance of the welfare system (Evers 1995).[11]

Together with a strong impact on overall service provision - which cannot be addressed here - the restructuring of the welfare system that followed the Keynesian period had notable effects on the role of CSAs.

Firstly, civil society gained an economic relevance within the newly established market for social services. Such an economic role[12] entailed a change of perspective in the way civil society was considered, and was recognized by the emergence of labels such as *third sector* and *non-profit sector*. These categories made their appearance at the end of the '70s to identify the positioning in the productive system of a part of civil society and to underline its growing relevance (Weisbrod 1977), legitimizing its role on economic, rather than social, premises.

Secondly, the role of civil society in providing services ceased to be seen as complementary, additional or somehow "separate" from the public sector, and started to be considered a structural element in the overall supply of services. Such a tendency gained momentum in the late '90s, when the emphasis on the role of community grew significantly, starting from the UK experience of the Third Way (Rose 2000). The turn toward community, as we will see, is the product of both an economic rationale (reducing public expenditure) and an ideological push towards the "responsibilization" of citizens. Moreover, the transformation was consistent with one of the main features of neoliberalism, which, according to Soss, Fording and Schram (2011), operated in the field of social policies not so much in the direction of replacing public with private, but rather with the goal of blurring the boundaries between the two.

Finally, the political role of civil society gained a new dimension in the transition from government to governance, which did not replace the dimension of antagonist and "challenger", but rather shifted it aside. Civil society (especially in its third sector component) was increasingly pushed toward institutionalization by various national reforms, formally becoming part of public policy making, sharing choices and responsibilities and promoting change "from the inside". The role of intermediary, which until then consisted of protecting citizens from the possible abuses of the state (Janoski 1998), acquired a new dimension, consisting of "representing the welfare state to its

[11] The term governance in itself started to spread in those years as a way to describe the progressive "hollowing out" of the state and the overcoming of top-down decision-making process, replaced by policy networks that involved civil society and market actors.

[12] This is of course not entirely new, as shown by the mutual-aid and cooperative experiences.

citizens, providing a buffer between state policy and service delivery" (Smith and Lipsky 1993, 3).

The new scenario of the welfare mix is therefore very different both in terms of the actual role of CSAs – whose functions and relevance have indeed broadened significantly – and in terms of an interpretative framework. The boundaries of what was considered "public" no longer overlapped with the idea of state owned or state managed (de Leonardis 1996), but were enlarged to include those services considered "of public interest". Within this scenario, new opportunities opened up for civil society, but tensions and contradictions arose.

4. Third sector and social movements in contemporary welfare. Roles, opportunities and challenges

The historical overview presented in the section above shows that the whole development of welfare should be better read in terms of coexistence, cooperation and contention between state and civil society, rather than as a history of "replacement" of civil society initiatives by the insurgence of a public system. The interlocking of the two domains is clearly detectable, since the earlier experiences, self-organization and non-public initiatives are far from being complementary for the majority of welfare development. However, a historical perspective is relevant far beyond the recognition of the relevance of their roles. Indeed, it shows the growing heterogeneity, as well as the progressive differentiation, of the various actors operating within civil society. Such a progressive diversification has been boosted in the last forty years by the emergence of the categories of *third sector* and *non-profit*, which acted as interpretative categories even before becoming regulatory ones. Such a growing heterogeneity had consequences on scholarship as well: indeed, strands of literature dealing with specific kinds of actors started to develop on separate paths (Anheir and Scherer 2015). The main divergence is certainly the one between third sector and social movement studies, since the former came to be seen as the depoliticized part of civil society, fully oriented toward participation and cooperation with state or market institutions (Kaldor 2003, Corry 2010), while the latter focused more on political contention (Diani, 2015). There are, of course significant exceptions to this rough generalization on both sides: third sector scholars have highlighted the continuity with the social movements of the 60's (Evers and Laville 2004) and dealt with its political role (see Busso 2018), while social movement studies have not neglected the role of service providing (Kriesi 1996, della Porta and Diani 2006, Anheir and Scherer 2015).

Finally, the historical overview clearly show the progressive widening and diversification of the roles played by CSAs in the evolutionary process of welfare systems, from the charitable model of their origins to the complex scenario of the welfare mix. Such an evolution can be described following two main analytical dimensions, which can be used to elaborate a comprehensive conceptual framework in which the various experiences of civil society can be positioned.

The first dimension focuses on the *functions* of CSAs, which since the earliest period have always had a dual role, namely providing services to citizens and exerting political pressure. The function of service providing was chronologically the first to appear, and gained different meanings in the course of history. Service to citizens developed within civil society before the emergence of public policies, but definitely endured beyond the establishment of a welfare state. With the growth of public intervention, such services became either "complementary" (filling gaps in the public supply) or "alternative" (promoting different models of intervention) and were eventually "integrated" into the public system. Their political function developed over the subsequent years and mainly, though not exclusively, targeted the state, addressing its role from different perspectives. Indeed, the claim for more public effort in granting social rights went along with the opposite demands for a lower degree of intervention rather than a change in the direction of public policy.

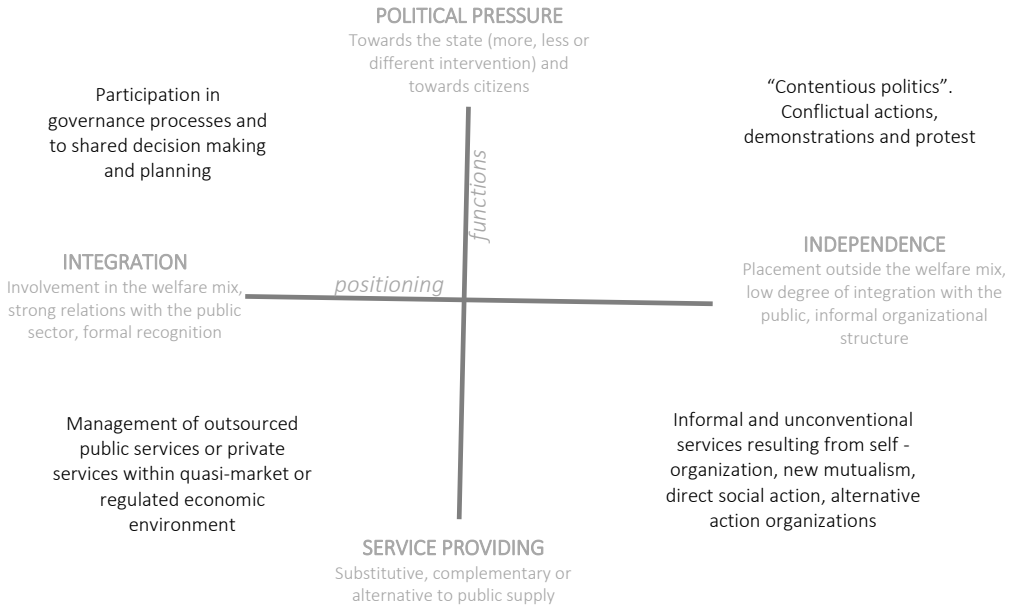
The second analytical dimension is the result of the post-Keynesian reconfiguration and deals with the positioning of CSAs within the welfare mix, mainly concerning the degree of integration with the public sector and cooperation with other actors in the welfare triangle. Moreover, the degrees of integration or autonomy also depend on the acquisition of legal status and the formalization of organizational structure. Such an analytical dimension overlaps that of functions, since both political advocacy and service providing can take place in integration with the public system or separately.

The conceptual framework obtained by crossing these two dimensions is summarized in figure 1, where four different kinds of ideal typical roles are defined. On the side of political pressure, two different roles may be detected at the ends of the continuum of positioning. On the one side stands participation in governance processes (often at local level) and more in general in participatory planning, often promoted by public institutions, while on the other side the realm of so-called contentious politics is positioned, with protest and demonstrations being the fundamental elements.

The same distinction may be made for service providing activities. Within the welfare mix model, indeed, service may be offered by CSAs through public funding and without undermining the public/state ownership, or within regulated quasi-markets. On the opposite side, there are experiences of new mutualism, self organization or di-

rect social action that address citizens directly without conforming to the institutionalized models of intervention, sometimes even outside the legal framework (such as in the case of squatting).

Figure 1 – A conceptual framework for the definition of civil society's role



The various organizations, cases and experiences of CSAs can be positioned within this conceptual framework in different ways, and can only rarely be confined to a defined role or occupy a precise position on the graph. There are many reasons for this.

The main element to be taken into consideration is that CSAs can play many different roles simultaneously, since both functions and positioning are of course not mutually exclusive, and each dimension should be seen as a continuum (rather than a classification). As mentioned above, for instance, service providing can be seen as a way to exert (or reinforce) a political function, whether from within or outside the welfare mix system. In the case of social movements, concrete activities toward their constituency or even a wider public may strengthen protest in many different ways, such as by enhancing the visibility of the protest or acting as a means of recruitment (della Porta and Diani 2006). In a very similar way, a strong service-providing role can reinforce the "institutional voice" within governance processes (Onyx et al 2014).

Moreover, as has long been recognized, social movements often include more formalised groups and associations, the so-called "social movement organizations" (SMOs), which may enjoy formal and legal recognition and are able to act both within and outside the institutional scene (McCarty et al 1977, Davis et al 2005). Such an internal differentiation between formal and informal groups can be very useful in terms of resource mobilization, and can improve the advocacy capability of the social movements, allowing them to enlarge the scope of mobilization strategies (*ibidem*).

Aside from their ability to play different roles at the same time, CSAs are also dynamic and can change rapidly as a result of internal or contextual changes. In a diachronic perspective, therefore, CSAs can move within the framework following trajectories of progressive institutionalization or, on the contrary, radicalization.

If collective actors can play different roles (simultaneously or in different moments), and cross the blurred boundaries between functions and positioning in the welfare system, individuals enjoy even greater freedom. This is partly linked to individual trajectories and to the well-known link between civil society and institutional politics, the former being a major recruitment field for the latter, but also to the possibility that individuals can at one and the same time cover multiple roles and belong to multiple groups of actors. For instance, social movement activists can work for non-profit organizations, acting as political players outside the institutional framework while, at the same time, functioning as service providers within the welfare mix system.

The blurred boundaries between functions and positioning, as well as the possibility of playing multiple roles described above, highlight a certain degree of freedom and opportunity for CSAs. However, within this conceptual framework, many trade-offs, tensions and contradictions may arise.

The first set of contradictions that have to be explored concerns the sometimes difficult connection between the role of service provider and that of challenger, or more broadly with the exercise of a political role.

The most obvious problems arise from the provision of services within a market system, which mainly concerns third sector organizations. Over the last twenty years, scholars have focused on the process of the marketization of civil society, highlighting the progressive convergence with companies and the threats this may present for the ability to play a contentious role within the system, and more broadly for the capacity to reinforce social fabric and generate social capital (Weisbrod 2000; Eikenberry and Kluver 2004; Skocpol 1997, 2013; Eliasoph 1998). In brief, the marketization of civil society can undermine its potential for transforming society (Nickel and Eikenberry 2009), eventually reinforcing, rather than defeating, the existing status quo of inequalities. This may happen regardless of the fact that the financiers might be the public sector

(as in the case of outsourcing or grants), private actors or individual citizens. In all cases, indeed, the services offered may follow the wishes of the funders and almost inevitably end up in mainstream solutions. Moreover, as in the most recent case of social impact bonds analysed by Joy and Shields (2013), the market forces organizations to focus on the target capable of generating more revenue, rather than the most vulnerable. Roughly speaking, non-profit actors that enter the market may end up putting survival at the top of their priorities (Brody 1995), and therefore cannot run the risk of disappointing the funders, mainly represented by the public sector (Smith 2015). Moreover, managerialism had weakened internal democracy within non-profit organisations, lowering "indirect" political potential (Aiken and Bode 2009).

The possible tension between the roles of challengers and service providers, though mainly related to the need to survive in the market, may also happen outside its boundaries. The contradiction is of course not new, since it was a source of tension even in the first experiences of mutualism (Meriggi 2005), dealing with the trade-off between self-organization and political contention. On the one hand, self-organization aimed at improving the well-being of excluded people has conflictual potential, since it may challenge the way in which services are offered by the state, providing alternatives and, as stated above, enrolling excluded people in political initiatives (Piven and Cloward 1977). On the other hand, however, it may offer support to the retrenchment of welfare systems and weaken demands for more social rights. It is not by chance, therefore, that mutualism (Birchall 2002) and voluntary action (Salamon 1986, Milligan and Conradson 2006) often enjoy the support of the ruling class in times of resource crisis. Self-organization can in fact be consistent with a growing narrative of responsabilization of individuals and communities, who are expected more and more to "do it by themselves" (Yeo 2002) without reliance on state assistance.

The political role of CSAs also faces risks in the second dimension, the one concerning integration into the welfare mix system. However, the main problems in this field are not related to an overall loss of political potential, but rather to the possibility of playing an antagonistic or conflictual role. Indeed, as a result of the transformation of the governance structure, many CSAs have gained a voice within political processes from which they were usually excluded. However, as we will see, such a voice is not always accompanied by a corresponding degree of freedom.

Roughly speaking, the dilemmas may be reduced to "the tension between resource mobilization and social control inherent in the decision to incorporate" (Cress 1997, 344): survival outside the welfare mix is indeed more and more difficult, especially for those who want to provide services of any kind, but entering the system almost necessarily imposes limitations and triggers moderation processes. The concept of "incorpo-

ration" is therefore crucial, and its different meanings should be explored. The first meaning comes from the social movement literature, and can be defined as the entrance in the "institutional arrangements of society" or institutionalization (Giugni 1998, xii), making it difficult to distinguish social movements from established interest groups[13]. In the social policy field, such an incorporation consists of the acquisition of formal recognition by means of non-profit organisations and often in professionalization (Cress 1997). A second step of incorporation can be derived from the literature on the third sector, and consists of a direct relationship with the public system, echoing the idea of the shadow state (Fyfe 2005). Both nuances of meaning imply some form of institutionalization and have an impact on the way the political role is played in various ways. Outside the governance system, the acquisition of a legal status by SMOs implies two different forms of moderation. The first concerns the time devoted to protest and the traditional repertoires of action by social movements: facing a growing number of bureaucratic duties, many activists tend to put aside this kind of activity. The second concerns tactics and in particular the abandonment of more radical activities, whose legal status can jeopardize the official recognition of the organization.

Turning to the organizations, mainly belonging to the third sector, taking part in the governance process appears to create a more complex situation. In fact, formal recognition as a policy maker does not automatically generate a strong political voice. On the contrary, the level of recognition enjoyed by non-profits seems to depend on "the scale and scope of their contribution to tackling collective concerns without reliance on the formal resources of government" (Stoker 1998, 21). In this sense, the dimensions and financial resources of organizations become a strong predictor of their ability to steer, or at least influence, the decision-making process. Such economic potential is also a relevant feature, influencing their formal inclusion in the process, since governance does not grant participation to everyone, and participation is not *per se* a warranty of democracy (Moini 2011).

The neoliberal framework in which governance develops, as well as the progressive dependence of "integrated civil society" on public resources, also shapes the claims and forms of advocacy. Since processes are key moments in defining the overall amount of resources for non-profits, conflicts and radical positions can be very risky for them. Advocacy is then often played "with gloves on" (Onyx et al 2010, Bloodgood and

[13] In the social movement literature, institutionalization – understood mainly as the creation of large bureaucratic organisations – is often linked to the decline of mass protest (Piven and Cloward 1977). More recent studies, however, have also suggested that the creation of a formalised structure helps organisational maintenance, a key element for social movements' survival and remobilisation, assisting grassroots efforts when new campaigns and mobilisations arise (Staggenborg 1988).

Tremblay Boire 2017), to avoid compromising the entitlement to manage services. Therefore, the possibility for the third sector to realise its political potential not only in terms of advocacy, but also in enhancing citizen participation, is still a very controversial issue (Bode and Brandsen 2014). In many cases, there may at least be a trade-off between political and social advocacy (Jenkins 2006).

Aside from the strategic behaviour of single organizations, the welfare mix and the presence of an "integrated system" may have political consequences in cultural terms, namely triggering a narrowing of the discursive space and a reduction in the plurality of voices and claims. The cultural dimension of governance, often neglected by political studies (Fisher 2006), is indeed very relevant. Whether for the use of force or the authority of key players, or simply because of a process of convergence of the language due to interaction, actors involved in participatory processes often end up "talking the same language", reducing the distance between alternatives. Such a convergence spreads from inside the process to the whole society, resulting "in a considerably weakened public sphere" (Gaynor 2011, 497).

Within this scenario, exit from the process can be seen as a winning strategy in terms of capacity to preserve organizational autonomy, but also to influence the policy-making process (Davies 2007, Mettler and Soss 2004). In fact, the legitimacy of governance is strictly connected to the degree of participation of the actors involved, making exit (or more simply the threat of exit) a valuable instrument.

Integration or incorporation can therefore be double-edged, since it may provide resources for service providing and give political voice, but can limit freedom, autonomy and voice. In the choices of CSAs, preferences and strategies have to deal with a changing environment. As argued by McCarthy et al (1991), aside from the voluntary process of incorporation, a "tangle of incentives", both tangibles and intangibles, can act strongly within the institutional environment, leaving no real choice to many informal organizations. The lack of resources linked to the recent crisis can strengthen this long-running dynamic.

However, the crisis and the consequent process of retrenchment can also act in the exact opposite way, as a trigger for direct social action, as shown in the recent literature on the so-called alternative action organizations (Bosi and Zamponi 2015, Giugni and Grasso 2016, Uba and Kousis 2018, Kousis and Paschou 2017). These experiences developed during the crisis to provide citizens and the movements' constituencies with services and support, and can be defined as "collective bodies engaged in carrying out alternatives to dominant socioeconomic and cultural practices through actions that aim to provide people with alternative ways of enduring day-to-day difficulties and challenges in hard economic times" (Zamponi and Bosi 2018, 797). Such practices are

linked to the crisis in two different ways. They aim to answer needs which have not been taken care of by the state, but they are not merely the product of a "void". Indeed, they originated from a new wave of political engagement and a cultural change that followed the crisis (Castells et al 2012, 2017). In this sense, alternative action organizations can be considered as a form of politicization of solidarity (Zamponi and Bosi 2018), since they imply a transition of issue from private to public, making them the object of a political vision and of confrontation.

The scenario is therefore characterized by simultaneous processes of depoliticization and repoliticization, as well as moderation and radicalization of demands and issues, both boosted by the economic context. While some CSAs give up their political role to devote their action to the market, or lose their conflictual potential, "drowning" in the mechanism of governance and in the quicksand of institutionalization, other actors give life to activities of service providing charged with political value, making them, at the same time, the vehicle of a claim for a different welfare system.

5. Overview of the special issue

The ten articles presented in this special issue provide a valuable contribution to exploring the role of CSAs in welfare transformation, covering all the dimensions of the conceptual framework described above and showing a wide range of opportunities, constraints and dilemmas. Coherent with such a comprehensive aim, the articles come from different scholarly traditions and focus on a variety of policy areas, national contexts and types of organizations and collective actors. Despite this heterogeneity, however, they effectively converge on the identified analytical dimensions, articulating and developing their content through empirical research.

As to the service providing-political pressure continuum, the common starting point is the recognition of a wide potential on both fronts and of the possibility, at least theoretically, of combining both functions. However, the case studies highlight trajectories and possible contradictions and trade-offs.

In his work on social care civic enterprises in the Netherlands, **Hendrik Wagenaar** highlights how the institutional environment considerably weakens their innovative potential, as they are ""hemmed in by more powerful forces of corporate and political governance". This dynamic is described as a "democratic paradox", since despite the enthusiasm of citizens and the favourable attention of governments, civic enterprises are often confined in the community in which they emerged. In a similar way, SMOs involved in the management of the refugee crisis in Malmö, Sweden, analysed by **Jan**

Jämte and **Ilaria Pitti**, are asked to "downplay or abandon their political ideology" in order to enter forms of cooperation with NGOs and institutionalized politics, eventually accepting a complementary role. If in the case of Malmö this is the result of a process, **Magda Bolzoni**'s analysis of the regeneration process of a neighbourhood of Turin, Italy, shows another relevant aspect. In her case study, conflict is not removed during the process, but is avoided *ex ante* through "selective inclusion" in which "only some specific stances are actually legitimated, empowered and included, namely those aligned with the existing neoliberal urban agenda".

However, the trajectories are not defined exclusively by environmental constraints. In **Maurizio Busacca** and **Flaviano Zandonai**'s research on the Italian third sector, the two case studies of regeneration of community assets show a process of removal of the conflictual dimension of civil society organizations that result from an "evolution of the TS from advocacy to a publicness direction". In this evolutionary process, the transformation appears to be the result of a voluntary choice, in which even decisions on the organizational form are shaped by the will to "maximise opportunities for success". The same focus on organizational agency can be found in **Sebastiano Citroni**'s article on the role of civil society actors in a local governance process in Italy. Indeed, the author notices how a reading of depoliticization as the exclusive product of marketization of welfare implies "a number of shortcomings", including "the assumption that CSAs are passive agents". What we are dealing with is not the absence of critical positions, but rather a depoliticization that consists of the way in which they are expressed, revealing " 'economic-corporate' more than 'ethical-political'" motives.

The strategies and trajectories, however, can in some cases be less linear or more nuanced. **Loukia Kotronaki** and **Stella Christou**, for instance, in retracing the experience of Greek Clinic-Pharmacies Solidarity Structures, show a path that may apply to many direct social action initiatives. The cycle is distinguished by a phase of strong politicization that went along with the anti-austerity movement followed by a depoliticization process in which solidarity and service providing were "no longer a means to an end, but an end in itself". In other cases, such as that of Can Batllò (Barcelona, Spain) described by **Viviana Asara**, the risk of depoliticization is avoided by social movements employing a variety of forms of action, thus avoiding "turning the Can Batllò social innovation into a neoliberal rollout strategy". Based on a similar premise of non-contradiction (in the Swedish case) between service-providing and political pressure, **Håkan Johansson**, **Roberto Scaramuzzino** and **Magnus Wennerhag** explore the advocacy strategy of two different kinds of CSAs in Sweden, namely social movements and interest groups. Their focus on repertoires of action shows the heterogeneity and the diversification of means adopted by CSAs which converge on the use of multiple tech-

niques, though preserving their specificity as to the balance between presence in the public arena and direct influence through access strategies.

Finally, though starting from very distant premises, a strong trend toward politicization and conflict is described in the articles by **Lorenzo Zamponi** on direct social action in Italy in a context of welfare retrenchment and **Anna Reggiardo** on NGOs in the recent migrant crisis on the Italian-French border. Zamponi reverses the perspective that traditionally ascribes direct social action in service providing to the lack of public intervention, describing it rather as a "choice related to the phase of movement latency and declining participation in protest events which have characterised Italy since the end of the 2008-2011 cycle of anti-austerity protests". Actors with a social movement background intentionally turn to service providing as a way to promote political participation, politicizing everyday life. Well aware of the risk of depoliticization and of backing up welfare retrenchment, the activists devote their efforts to safeguarding the conflictual and political potential of their initiatives. By contrast, Reggiardo's NGO starts from a more institutional and non-oppositional background, and they are reluctantly turned into conflictual actors by securitarian and depoliticized institutions, "stigmatizing not only migrants but also their supporters".

The ten articles also give just as rich and varied a picture on the continuum of positioning. If, at first glance, the differences between social movements and the third sector appear more clearly defined, the trajectories highlighted show a notable degree of contamination and a number of nuances. One of the main themes throughout the papers is the degree of agency that CSAs benefit from. **Wagenaar**'s civic enterprises, for instance, suffer from a source of forced integration that comes from their role in the market of service provision. Similarly, in **Bolzoni**'s work, the choice concerning integration into the processes depends on the public actor, acting as a gatekeeper, selecting the preferred organizations. On the opposite side of the conceptual framework, the NGOs analysed by **Reggiardo** experience an analogous lack of agency, being pushed out of an institutional framework by means of propaganda and law. In other cases, CSAs enjoys greater "room for manoeuvre", though all of them suffer the pressure towards incorporation. In **Jämte** and **Pitti**'s analysis of the refugee crisis in Malmö, the need for systemic integration emerges clearly, since none of the actors involved is self-sufficient in facing the emergency. However, SMOs can choose between different strategies, including an exit from the system in order to preserve their political identity. On the contrary, the integration of the third sector in **Busacca** and **Zandonai**'s article is the result of a pragmatic, rather than ideological approach, as well as the organizations studied by **Citroni**, which consider integration from an economic perspective. Interestingly enough, their inclusion is however valued in political terms by the institutions, since

they are expected "to play a consensus-building role, rather than simply contributing to developing the planned interventions". **Christou** and **Kotronaki** instead show a more typical trajectory of institutionalization, in which the direction toward cooperation is mainly due to changes in the political scenario, namely the election of a left-wing government. Integration, however, is not always seen as a clear choice that marks a turning point in organizational life. Both **Asara,** and **Johansson** and colleagues, despite the different cases and approaches, show this kind of positioning. The case of Can Batllò is indeed defined by the author as a model of "flexible institutionalization", and the situation of Swedish SMOs can only partly be ascribed to a trend of progressive institutionalization, since the so-called "new social movements" in particular adopt a very diversified strategy. Finally, in **Zamponi**'s article, avoiding institutionalization is one of the main explicit goals of welfare-from-below initiatives carried out by activists with a strong social movement background: the institutional field is indeed the one in which the "trap of substitution" with public welfare may take place.

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