

Review

European Tendencies of Territorialization of Income Conditional Policies to Insertion: Systematic and Narrative Review

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Abstract: (1) Background: ICIP territorialization has been a trend in European countries. Evidence shows that local monitoring is effective in the process of social inclusion; however, territorial differences may cause different results in social and professional trajectories. This systematic and narrative review aims to understand the territorialized elements in income conditional policies to insertion and envisage challenges of national organizations for efficient socio-employment insertion. (2) Methods: Data collection was carried out using Scopus. In addition, a manual search of gray literature by reference authors was used. As a methodology, bibliometric analysis was performed using Vosviewer. (3) Results: The results indicate an increase in the number of publications and citations, especially since 2004. The journals whose articles have the highest citation and co-citation rates belong to the social sciences field. It was possible to detect a strong interconnection between authors, sources, and keywords co-occurrence. The four clusters reveal that the research trends meet the need to restructure the Welfare State, around the new social risks, with the territorialization of the ICIP being a proximity response strategy. Social and professional insertion vary according to territorial cohesion, strong conditionalities with real insertion opportunities and degree of decentralization (4) Conclusions: The degree and effectiveness of ICIP decentralization and socio-employment insertion vary according to the trajectories of European welfare state models and the degree of coverage and generosity of the social protection system. Territorialization tends to reduce the costs of social protection, but these measures remain hostage to different territorial opportunities and real conditions of insertion.

Keywords: decentralization; insertion-conditioned income policies territorialization; welfare; activation



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1. Introduction

ICIP and other non-contributory social policies are instruments to minimize poverty rate and social exclusion through social and professional integration and a minimum income. In this domain, activation is a concept that includes social inclusion based on labor market access to facilitate emancipation and participation [1]. ICIP territorialization results from a political Welfare State reform strategy for reducing expenditure with social protection and based on the recognition of the influence of regional inequalities and endogenous forces on inclusion trajectories, with the emergence of a new development paradigm based on place-based policies. Considering territory as a dimension of government action, this paradigm enabled the creation of new collaboration methodologies and the participation of new actors from the public, private, solidary, and civil society sectors to implement responses on a regional scale [2,3]. ICIP presupposes shared participation between the local structures of the public power and the organizations and associations of the solidary sector with representation in the regions. This welfare mix model allows for networking and the sharing of responsibility within the various domains of social intervention [4].

The ICIP, in recent years, has followed an activation logic aiming at the social and professional insertion of the beneficiaries. The fundamental principle of activation is based on autonomy through the implementation of strategies that promote access to employment

and professional requalification and that allow access to support citizenship services, which has produced positive effects [5,6]. Decentralization and shared management at the local level allow for decision-making based on local needs, the implementation of social action policies and close monitoring [7]. The research question is ‘What are the key elements for an efficient ICIP territorialization, considering European Welfare social models?’.

This systematic and narrative review of the literature (SNR) aims to understand the territorialized elements in ICIP and envisage challenges of national organizations for efficient socio-employment insertion. More specifically, it intends to evaluate the effectiveness of the territorial and decentralized logic as an instrument of intervention and local participation and to trace the tendency of articles and investigations already published.

2. Materials and Methods

The SNR follows PRISMA 2020 guidelines for systematic reviews. To construct a database, the search terms and inclusion criteria were defined. The chosen methodology was bibliometric analysis—a quantitative method that allows for the aggregation of information from the bibliographic records created in the scientific community [8]. The database was extracted from Scopus for subsequent bibliometric analysis: distribution of publications by year, by country, analysis of citations, co-citations, co-authorship, and keyword co-occurrence.

2.1. Eligibility Criteria

The SNR was carried out from the search in the Scopus database using the terms ‘welfare’, ‘social policy’, ‘europe’ and ‘activ*’ in the title, keywords and abstract, which resulted in a total of 401 documents. The research was not carried out with the terms ‘southern europe’, ‘decentraliz*’ and/or ‘local welfare’, since the number of available documents is not very expressive. As inclusion criteria, documents in article format, books, book chapters, reviews, notes, conference articles, editorials, and errata from the disciplinary areas of social sciences, economics, econometrics and finance were selected, which resulted in 285 published articles between 1975 and 2021 (Table 1). A total of 18 documents were manually excluded, 1 for not being related to the research question and 17 duplicates. Complementarily, a manual search of gray literature was carried out for the construction of the theoretical framework and support for the results obtained. This mixed model was chosen to minimize the risk of excluding the scientific reference framework and biasing the review results [9]. Gray literature analysis was carried out following the AACODS guidelines created by the University of Flinders [10], which evaluate documents according to their reputation (authors associated with reputable organizations and/or with professional qualification and experience), accuracy (methodological robust), temporal adequacy (authors considered recent bibliography for analysis theme trajectory, so long as other authors with reputation), coverage, objectivity (bibliographic search focus on territorialization, decentralization, workfare, activation and welfare state reconfiguration), and significance (documents was selected by utility, main results, with contemporary material and representative of ICIP trajectory in each welfare state regime model). In this sense, the SNR was complemented by the analysis of the narrative of 114 documents.

2.2. Information Fonts

Data was extracted from Scopus for bibliometric analysis. In addition, a manual search was carried out and considered the documents and authors that meet the requirements of AACODS, namely the search for the most prominent and most cited authors in the Scopus database and research of reports and data on the official websites of Social Security Institute, European Anti-Poverty Network, European Parliament, Organization for Economic Cooperation and Development, National Institute of Statistics and Pordata.

Table 1. Research guidelines for SNR.

Review	Description	No of Documents
Systematic	1. Scopus search with keywords ‘welfare’ + ‘social policy’ + ‘europe’ + ‘activ*’ in title, keywords and abstract	409
	2. Disciplinary field selection: social sciences, econometry and finance	311
	3. 1975–2021 timeline	303
	4. Document select format: article, book, book chapter, reviews, notes, conference proceedings, editorials, and errata	303
	5. Manual exclusion of 18 documents: 1 not related to research question and 17 duplicate	285
Narrative	6. Scopus database co-citation and references consultation	
	7. AACOODS (authority, accuracy, currency, coverage, objectivity, and significance) guidelines application	
	8. Document selection: 44 articles, 26 books, 5 book chapters, 2 conference proceedings, 34 reports from official organizations and 3 websites consultation.	114

2.3. Selection Process and Data Collection

The selection process to define the keywords began with author Ana Pinto reading the titles, keywords, and abstracts of articles related to the research question. Then, after defining keywords, a search was carried out in Scopus, and after applying the eligibility criteria, the results and conclusions of the documents were reviewed, allowing us to understand the tendency in literature on the impact of ICIP territorialization and the social and professional insertion, in terms of employability, autonomy and territorial cohesion of employment, establishing a relationship between this dynamic and the different models of the Welfare State in Europe. Bibliographic data were analyzed manually, independently by the authors, using VOSviewer to eliminate duplicates and bias in the results. Cluster analysis was performed based on the distribution of each cluster in an automated way and manual analysis of the bibliography present in each one.

3. Results

3.1. Research Question

The formulation of research question is ‘What are the key elements for an efficient ICIP territorialization, considering European Welfare social models?’.

3.2. Publications Evolution (1975–2022)

The number of publications about ICIP territorialization increased considerably from 2004 onwards (Figure 1). The literature shows different chronologies between European countries; however, the discussion about the need to create policies based on inter-institutional cooperation dates to 1975. The first publication [11] makes a comparison between the trajectory of social policies and their budgetary expenditure in Europe and introduces the concept of political harmonization, which concerns the need for the interdependence of the various public and private actors in the redefinition of social policy. In this sense, it appears that in this period, there was already a need to create policies based on networking and inter-institutional cooperation.

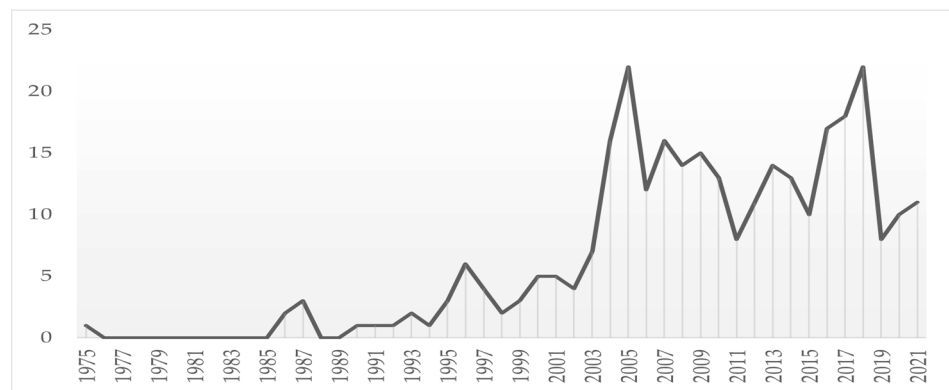


Figure 1. Distribution of publications between 1975 and 2021.

Regarding the European countries with the highest number of publications (Figure 2) in the Scopus database, it appears that the majority belong to the United Kingdom, with 66 articles, Germany with 42 articles, Italy with 26 articles, the Netherlands with 20 articles, Denmark with 18 articles, Spain with 16 articles and Norway with 15 articles. The United Kingdom was included since its exit from the European Union dates from 2020. Most of the published articles refer to active policies aimed at the labor market, restructuring of the Welfare State and effectiveness of access citizenship conditions in Europe.

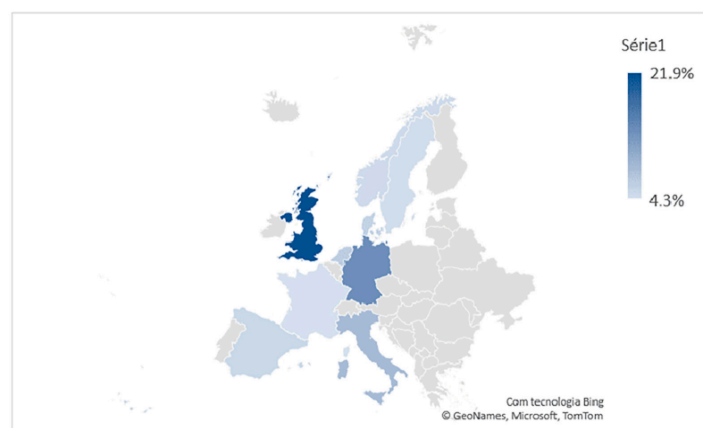


Figure 2. European countries with the highest number of publications.

3.3. Citation Analysis

The journals with the highest number of publications are the *Journal of European Social Policy*, *Social Policy and Administration*, *Journal of Social Policy*, *International Journal of Social Welfare* and *Social Science and Medicine*, with a total of 121 journals (Table 2). As for citations, the *Journal of European Social Policy* and the *Journal of Social Policy* are the journals with the highest number, with *Social Science and Medicine* having the highest citation score.

The author with the most publications is Taylor-Gooby, P. (with 7 publications and 617 citations), which address welfare state reform and the adoption of activation programs in the United Kingdom, and the author with the most citations is Daly, M., with 3 publications and 234 citations. One of the documents with the highest number of citations is a book chapter by Taylor-Gooby, that analyzes the reconfiguration of the Welfare State at the European level based on the new social risks of modern society. The latter analyzes the trajectory of the European Welfare States in the last decade, mentioning the importance of the welfare mix logic in the effective implementation of social protection measures (Table 3).

Table 2. Top five highest publication Journals.

Journal	Publications	1st Publication	Last Publication	Citations	Cit Score ^a	SJR ^b	SNIP ^c	Discipline(s)
<i>Journal of European Social Policy</i>	19	1996	2021	741	4.4	1.429	2.262	Social sciences and environment
<i>Social Policy and Administration</i>	16	1996	2020	403	3.7	0.972	1.926	Social sciences
<i>Journal of Social Policy</i>	13	2002	2018	684	4.6	1.425	2.385	Social sciences
<i>International Journal of Social Welfare</i>	7	1996	2017	108	2.1	0.664	1.67	Social sciences
<i>Social Science and Medicine</i>	6	1991	2012	306	6.1	1.913	2.331	Art and humanities, social sciences, health

^a Citation Score; ^b Scimago Journal Rank; ^c Source Normalized Impact per Paper.

Table 3. Authors with highest number of publications and citations.

Author	Publications	Citations	Average Citation per Article
Taylor-Gooby, P.	7	617	88.4
Hemerijck, A.	4	115	28.75
Bonoli, G.	3	165	55
Daly, M.	3	234	78
Ervik, R.	3	22	7.3
Graziano, P.R.	3	50	16.7
Greve, B.	3	46	15.33
Nilssen, E.	3	16	5.3
Kvist, J.	2	103	51.5
Dahl, E.	2	69	34.5
Van Berkel, J.	2	81	40.5
Hofacker, D.	2	87	43.5
Principi, A.	2	55	27.5
Straubhaar, T.	2	43	21.5
Unt, M.	2	70	35

For citations analysis per document, a minimum of 5 citations per article was established. From a total of 175 articles, the 5 with the highest number of citations were selected (Table 4). The most cited article [12], with 542 citations, establishes the relationship between the new European labor market and the need to ensure binding social protection to active policies aimed at the labor market. The second document with the highest number of citations (390 citations) is a book chapter [13], as already mentioned. The third article with the highest number of citations (259 citations) [14] defends the construction of a Welfare State transversal to the European space to prevent the neoliberal penalization of poverty and prevent its consequences in society. The fourth document is a book [15], with 218 citations and, through the comparative analysis between welfare state regimes, concludes that in countries whose welfare state models follow a liberal–residual tendency and with a clear neoliberalism, there is greater flexibility in the labor market and greater dependence on social protection in the private sector and on informal solidarity mechanisms. Territorialization fits into the principles of Welfare State reform to guarantee a standard of social protection, articulating the different territorial levels in the operationalization, and constituting an alternative to a top–down protection approach. While programs de-

financed using top-down logic are managed at the central level, most programs defined using bottom-up logic have some degree of delegated authority. In fact, the decentralization of social support reflects the dynamics between the assumption of the universality of social rights and the inequality of local resources, calling into question the first premise. The fifth most cited article [16], with 208 citations, where the authors analyze the implications of transformations in family systems and the adjustment of workfare policies, stressing the importance of the individualization process in activation programs.

Table 4. Top five most-cited articles.

Author	Journal	Objectives	No of Citations
[12] Nickell, S. & Layard, R.	<i>Handbook of Labor Economics</i>	Explore the suitability and flexibility of the European labor market for the modern global economy.	542
[13] Taylor-Goody, P.	<i>Oxford Scholarship Online</i>	It provides an approach to the implications of designing social policies at European and national levels, considering new social risks.	390
[14] Wacquant, L.	<i>European Journal on Criminal Policy and Research</i>	It explains the use of the penal system as an instrument for managing the social insecurity generated in the classes by the neoliberal policies of economic deregulation and reduction of the action of the Social State.	259
[15] Ebbinghaus, B.	<i>Oxford Scholarship Online</i>	It assesses the impact of the reconfiguration of the various Welfare State regimes, production systems and labor relations.	218
[16] Pascall & Lewis	<i>Journal of Social Policy</i>	It addresses the implications of policies for gender equality in terms of family, economic and political transformations in Europe.	208

As for citations, there was a gradual increase (Figure 3), although a slight decrease was observed in 2014, a trend that follows the distribution of publications per year. The analyzed database has an h-index of 44; that is, in 44 published articles, there are at least 44 citations, which facilitates the identification of the most influential publications.

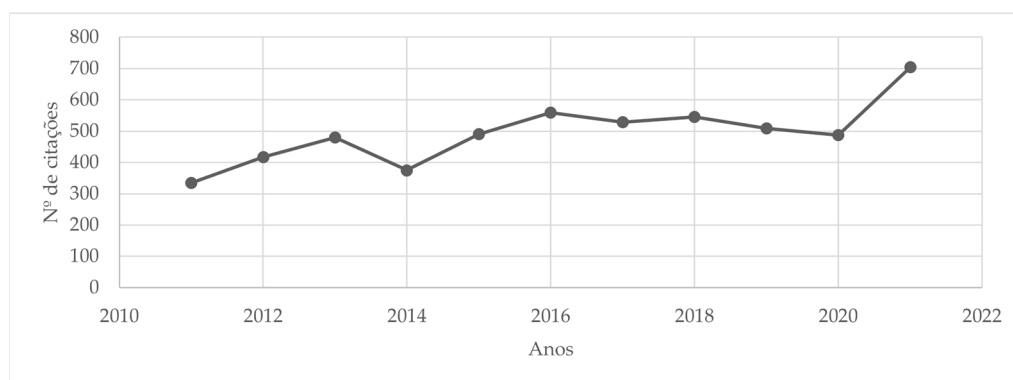


Figure 3. This is a figure. Schemes follow the same formatting.

3.4. Co-Citation Analysis

Table 5 presents the ten authors with the highest number of co-citations, that is, the authors who are most cited in articles in the Scopus database. Esping-Adersen ¹, Bonoli ²,

and Pierson³, are the authors with the highest number of co-citations, considering those who most contributed to the development of the theme.

Table 5. Top ten most co-cited authors.

Author	No. of Co-Citations	No. of Publications
Esping-Andersen, G.	212	73
Pierson, P.	116	52
Bonoli, G.	76	75
Palier, B.	68	74
Ferrera, M.	67	72
Hemerijck, A.	66	34
Palm, J.	54	6
Giddens, A.	53	51
Quinlan, M.	49	94
Lewis, J.	48	130

3.5. Cluster Analysis

Figure 4 shows the co-citation network, based on the criterion of 20 minimum co-citations per author, which results in 51 most prominent authors and four clusters. In the red cluster, the most co-cited author is Palier, with 68 co-citations; in the green cluster, it is Pierson, with 116 co-citations; in the blue cluster, it is Esping-Andersen, with 212 co-citations and in the yellow cluster is the author Bonoli, with 76 co-citations. The co-citation network demonstrates a strong connection between clusters, which indicates that authors tend to cite themselves, despite being from different disciplinary areas. As for the analysis of co-citations per journal, it appears that the most prominent are the 47 shown in Figure 5, whose selection criterion was having at least 20 co-citations. Two clusters were found, with the most co-cited journal in the red cluster being the *Journal of European Social Policy* (221 co-citations) and in the green cluster being the *Sydney Gazette* (73 co-citations). Although the magazines represented constitute different clusters, it appears that the interrelation between them is strong, especially in the red cluster.

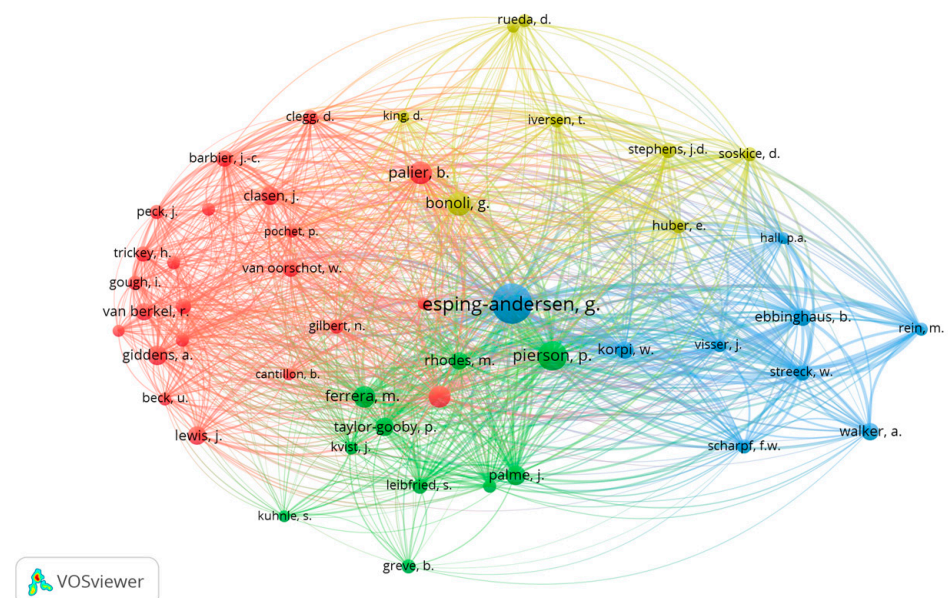


Figure 4. Co-citation network per author.

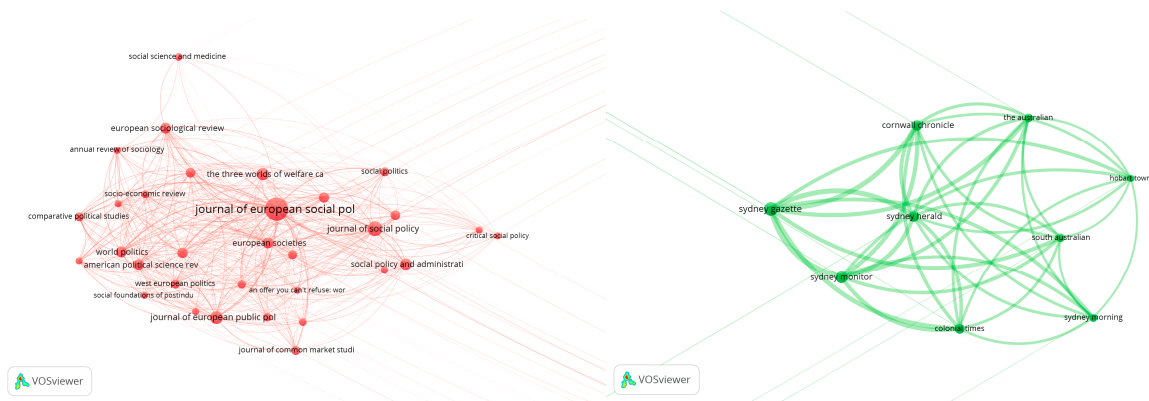


Figure 5. Co-citation network per journal.

For co-citations analysis, a minimum of 3 co-citations per article was performed, resulting in 61 articles (Figure 6). Of the 61 most co-cited articles, it was possible to group them into four clusters (Table A1), of which the first three have the highest number of connections:

- Cluster 1: The reconfiguration of the Welfare State (17 items);
- Cluster 2: The workfare model (14 items);
- Cluster 3: New social risks (14 items);
- Cluster 4: The decentralization and territorialization of ICIP (7 items).

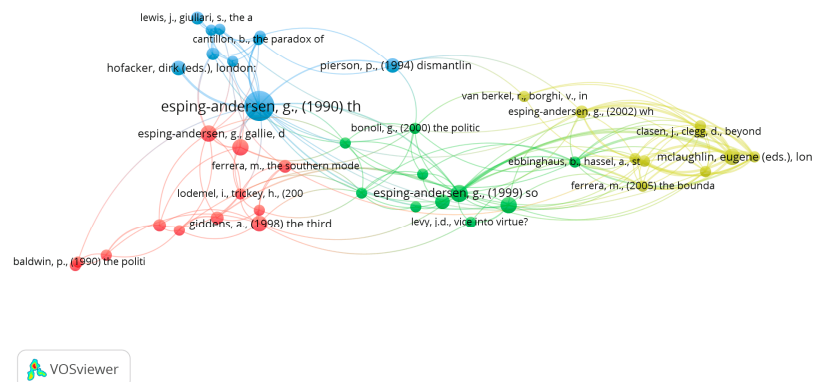


Figure 6. Co-citation network per articles.

3.5.1. Cluster 1: The Reconfiguration of the Welfare State

The first identified cluster brings together a set of book chapters on the need to restructure the Welfare State. The restructuring of the Welfare State in Europe must be consistent with the objectives established by the Lisbon Strategy, namely for inclusion and social justice [17]. The state should not only invest in education per se but also in strengthening the labor market so that sufficient, equitable and flexible opportunities are created [18,19]. The need to trace a path between European socialism and the neoliberal right, analyzing the debates of social democracy around five dilemmas: the implications of globalization, individualization as a risk of contemporary society, the convergence of socialism and neoliberalism, democratic mechanisms and the integration of ecological problems in the political debate [20]. Globalization must be considered not as a threat but as an instrument of economic and social development. The third way of democracy must be understood as a social-democratic response in which the Keynesian economic conditions do not allow for the increase in generosity through fiscal stimulation [21]. The political discourse on the Welfare State may intensify in countries where social and demographic changes are more evident, as in the case of Italy due to the high rate of aging and, consequently, the increase in public expenditure, raising challenges to its sustainability [17]. In the case of welfare

state reform in Mediterranean Europe, the author considers the institutional conditions for the social pact to be especially weak compared to Central Europe. In the case of Italy, Welfare State reform began in 1990 with the restructuring of measures associated with the labor market.

In Portugal, five tripartite pacts that began in 1987 included measures aimed at the social area and the labor market on the political agenda, with the creation of a minimum income policy in 1996. In Spain, the Toledo Pact ratified the reform of pensions and the flexibility of the labor market. Mediterranean Europe took a different path from the rest of Europe in redefining the Welfare State. Italy, Spain, Portugal and Greece are similar in several points, namely in the role of the family and informal solidarity, in the past marked by dictatorial regimes, in the high levels of unemployment, in the high rates of aging and in the importance of the informal economy [22]. However, these countries differ in terms of the implementation of anti-poverty policies and the institutional operationalization of these policies [23]. The introduction of individualization, which is inherent to reflective modernity or the risk society, understands the individual as an autonomous agent responsible for his actions and choices, breaking with traditional and familiar patterns, owing to the Welfare State shaping its action around the protection and minimization of risks arising from industrial society. The reform of the Welfare State in European countries has followed a trend of adjustment to the institutional specificities of each country, translating into the expansion and coverage of social protection, more particularly with the design of ICIP and the creation of new models of local governance. In fact, the reconfiguration of social protection is not a static process and must follow changes in the labor market around globalization, translating into new planning and intervention strategies at local level. The integration of the territorial logic in the process of socio-professional insertion associated with the ICIP works as a strategy to adapt monitoring and intervention to local needs in a context of partnership. An accompaniment tending to be individualized presupposes the existence of technical and logistical conditions that do not uniformly exist [22,23].

3.5.2. Cluster 2: Workfare Model

In the second cluster, the workfare model is approached as a substitute for the welfare model, having as a strategy the training and integration of human capital in the labor market through the association of constraints to social provision. The trajectories of the Welfare State models indicate the use of new institutional arrangements in response to the challenges of the post-industrial economy. The workfare model implies that social benefits are conditional on accepting a job [24]. In this way, the ICIP directed to the labor market aim to provide the development of human capital and their professional integration, through educational and training offer, under penalty of application of sanctioning measures in case of refusal or unjustified withdrawal [25]. However, the author mentions that activation measures are associated with temporary and precarious employment more than professional stability. In Denmark's case [26], the transition to the Shumpeterian workfare regime contributed to the reduction of the unemployment rate through the promotion of socioeconomic innovation at different territorial levels and the focus on policies aimed at the professional offer. The Danish workfare model, in addition to allowing the improvement of beneficiaries' qualifications, involves local private organizations in the professional integration process. The understanding of European citizens' perception of welfare state regimes and argues that the substitution of the welfare model for workfare emphasizes the participation of citizens and their empowerment, as they are co-responsible for their process of social and professional integration [27,28]. In this sense, the Welfare State must guarantee payment of the pecuniary benefit, access to citizenship support services (such as education, health, professional and training offer, housing, and social action) and territorialized monitoring, through the constitution of local follow-up teams, with citizens having to actively participate in the design and implementation of insertion measures.

3.5.3. Cluster 3: New Social Risks

The third cluster addresses the (re)adjustment of the Welfare State in European countries to the new risks of contemporary society. The nature of welfare states in the contemporary Western world can be classified into three regimes: liberal, conservative and social democratic [29]. The author mentions that the Welfare State models assume a dynamic character in response to the emerging risks of industrial development. With the institutionalization of social protection mechanisms, the Welfare State can shape its action around three principles: increased generosity and expansion of citizenship support services, maximum participation in the labor market, and welfare state reform in the United States of America and the United Kingdom in light of ideological power and trade union movements in policy-making.

In the case of Mediterranean European countries, the restructuring of the labor market had an influence on the working time of older people, especially those with low educational levels and belonging to the agricultural and industrial sectors [30,31]. In addition to demographic changes, social risks in contemporary society are the problem of reconciling professional and family life, single-parent families, family illness, lack of training/qualification and lack of coverage of health measures and social protection [31]. These risks emerge from post-industrial socio-economic transformations in the structure of the labor market and are compounded by the effect of globalization. European social democracy provides that social policies should be developed from the logic of activation and directed towards promoting citizenship, combating social risks and integrating into the labor market [32,33]. At the same time, the new social risks led to the departure of the Welfare State from the assistance nature and allowed the adoption of new assumptions and intervention methodologies, namely the territorialization of the monitoring inherent to the ICIP. In this context, monitoring is carried out in an integrated, planned and coordinated manner, using local resources in the socio-professional insertion process of the beneficiaries [27].

3.5.4. Cluster 4: The Decentralization and Territorialization of ICIP

The fourth cluster discusses decentralization as a public administration reform strategy, boosted by the progressive territorialization of public policies and presents the key elements for an efficient ICIP territorialization. When analyzing the impact of European policies on the European Welfare States at national and local levels, the decentralization process is described as a response to the administrative and functional pressure of the Central State resulting from the social and institutional dynamics [34]. The principles of activation, individualization and territorialization of ICIP emphasize individual responsibility in socio-professional integration [35]. The new forms of organization of the ICIP imply the action of not only the decentralized services of the public administration but also the representative structures of the business and solidarity sector, with territorial action. This decentralizing trend aims at the development of the Welfare State from two perspectives. First, the expansion of social services adjusted to new social risks and the post-Fordist labor market. The territorialization of the follow-up associated with the ICIP allows for a proximity intervention based on real needs and integrated with other social responses and locally available resources. Secondly, compliance with the fiscal budget allocated to the Welfare State to reduce the deficit of centralized power. The territorialization of social protection allowed for the creation of multilevel governance networks and the participation of the main local actors in the creation and implementation of social interventions and territorial development. However, the socio-economic development of territories depends on infrastructure and equipment from the private sector, access services to citizenship and human capital [34–36].

Activation policies aimed at the labor market and their implementation at the local level, based on collaborative work with the main social actors in the public, private and social sectors, resulted in more effective coordination and positive results in terms of professional integration. This organizational reform translates into the use of new inter-

vention techniques based on contracting models with a view to increasing efficiency and reducing costs with social protection. The limitations identified by the author concern the adequacy of the new institutional arrangements to community diversity and territorial variations regarding employment, which is considered homogeneous [37]. The literature showed seven social protection regimes according to their scope, structure and generosity: selective welfare system, public assistance state, welfare state with integrated social protection networks (United Kingdom and Ireland), protection dual social security (Germany, France, Belgium and Luxembourg), citizenship-based residual protection (Denmark, Finland, Sweden and The Netherlands), rudimentary assistance (Italy, Spain, Portugal, Greece and Turkey), discretionary decentralized support (Norway and Austria) and centralized discretionary support [38]. Regarding the countries of Mediterranean Europe, the author states that Spain and Italy are similar to the countries of northern Europe in that they have significant expenditures on social protection. In the case of Portugal and Greece, they are considered non-universal, exclusive and with limited and not very expressive benefits. The decentralization of the ICIP is presented as a management strategy and close monitoring, but it has limits. The sharing of political and administrative responsibilities by the state presupposes greater intervention and interactivity between local government, non-governmental organizations, and civil society, providing greater flexibility in formulating responses on a regional scale. However, given the lack of precision in defining the hierarchical field of action by the Central State, two types of constraints are identified: the mismatch (or disregard) between the legal powers and the powers effectively exercised and the transfer of financial resources that does not accompany the decentralization process, advocating, on the one hand, a top-down approach, maintaining the assumptions of governability, translating into universalist social and economic policies, and on the other hand, a bottom-up approach based on territorial monitoring [39–41].

3.6. Trends around Territorialization of ICIP in the Different Models of the Welfare State

At the end of the 20th century, mutations in social policies began to become evident, which focused on the productive dimension, collaborative networking and on the articulation of social protection with the implementation of local development formulas, underlining the character of activation, subsidiarity, and complementarity in the mobilization of institutional and community solidarity [42]. This new paradigm consolidated the idea of designing a social model across the EU resulting from the different Welfare State regimes [29,43–45]. According to Table 6, social assistance regimes result from different labor market trajectories. Countries with social-democratic regime models tend to involve social partners and share competencies with them as opposed to countries with conservative regime models, where the same competencies tend to be centralized or with a low level of shared competencies.

Table 6. Welfare model and social assistance regime.

Welfare Model	Description	Social Assistance Regime	Use of ICIP and Impact	Description	Country
Social democrat	Decommodification and universal social protection system, on a non-contributory basis, accompanied by active professional integration policies	Residual protection based on citizenship	ICIP with high activation programs and high generosity, with the involvement of social partners. ICIP contributes to reducing unemployment rate	Extension and inclusion/exclusion levels medium and high benefits	Finland, Denmark, and Sweden
Conservative corporatist	Robust social protection system, ensures non-universal minimum benefits on a contributory basis and high tax rates	Dual social protection	ICIP with activation programs and average generosity and low involvement of social partners. However ICIP helps to reduce poverty, it needs more intersectoral coordination	Below average length and inclusion/exclusion levels and average benefits	France, Germany, Belgium and Austria

Table 6. Cont.

Welfare Model	Description	Social Assistance Regime	Use of ICIP and Impact	Description	Country
Liberal	Commodified, social protection depends on the private sector, more than on State intervention, with high levels of poverty and social inequalities being evident, but on the other hand, high employability rates	Integrated social protection networks	ICIP programs, generosity and impact may vary according to decentralization degree	Extensive, inclusive, and above average benefits	UK and Ireland
Mediterranean	Prominence of contributory social protection and old-age pensions, marked by low taxes and informal protection networks, namely the family. In these countries, the cultural dimension and family values that structure civil society are evident, translating into mechanisms of intra-family professional integration and clientelism.	Rudimentary assistance	ICIP with activation programs and low/average generosity. Assistance tends to be decentralized and the impact depends on local resources.	Minimum extension, exclusive and low level of benefits	Portugal, Spain, Italy, and Greece
Post-Comunist	Corporatist characteristics and is described as a late effort to develop a welfare state similar to Western Europe, albeit in development and with high levels of inequality.	Dual social protection	ICIP programs are rudimentary, with high poverty rate and high level of unemployment.	Below-average range and inclusion/exclusion levels and average benefits	Latvia, Lithuania, Estonia, Cyprus, Poland, Hungary, Czech Republic, Croatia, Bulgaria, Romania, Russia and Ukraine

Fonts: [22,29,38,42–45].

The principle of subsidiarity has implied the evolution of local governance models towards new forms of multilevel governance and has included new orders that involve the devolution of powers to local territories and the multiplication of actors in the creation, implementation and monitoring of social policies [7]. This new model of governance foresees the transition from the hierarchical subsidiarization process to the horizontal one, and, despite being a common aspect in most European welfare states, the results differ depending on the political, economic and social conditions of each country. The multiplication of actors and the new institutional arrangements in the creation, implementation and follow-up of the ICIP guarantee the assumptions of individuation, activation and local development based on networking [23,46]. Social, political and economic transformations in Europe led to the reconfiguration of the role of the Welfare State, with the transition from the welfare model to workfare and the introduction of active measures aimed at insertion in the labor market. Simultaneously, new methodologies are adopted that commit local actors to the implementation of measures associated with ICIP. The effectiveness of the assumptions of territorialization and the degree of decentralization of these policies follow different trajectories at the European level. The flexibility associated with decentralization translates into different levels of execution, which vary according to territorial influence. Territorial inequalities are a factor that compromises the principle of equal access to goods and services, compromising the fulfillment of the social rights of ICIP beneficiaries [47].

3.6.1. Northern Europe

In Denmark, similarly to the Swedish model, the ICIP have capacity-building and training programs for beneficiaries (Jobskabelsesordningen), accompanied by compensation (Jobtilbudsordningen) and mobility supplements, promoting autonomy through profes-

sional integration. The monitoring and implementation of conditionalities associated with ICIP foresee the cooperation and involvement of social partners, especially unions, who are responsible for designing and implementing professional reintegration programs [48,49]. In 1994, management and implementation powers were decentralized to municipalities, increasing the involvement of social partners in the implementation and management of ICIP [50,51]. Although financial management and legislative power continue to be carried out centrally, the territorialization of these measures has given greater flexibility in monitoring beneficiaries and in creating different support mechanisms for professional integration, namely the creation of customer-centred programmes, education and training and the creation of various job types suited to the individuality of the beneficiary [52,53].

Key elements for effective ICIP territorialization are the payment of generous social benefits, the strong activating component aimed at integration in the labor market is strongly marked by Europeanization, and the delegation of competencies to local partners, including trade unions and representatives of the business sector, are the factors identified as promoters of a significant reduction in the unemployment rate and the effective reintegration of beneficiaries into the labor market [53]. However, the relationship between the level of autonomy granted to municipalities and local needs in terms of access to public services is still under discussion since the more developed municipalities that surround the geographical area of Copenhagen have greater decision-making power in comparison with socially, economically, and demographically less developed municipalities [51].

3.6.2. Central Europe

In Germany, whose welfare state model follows a conservative/corporatist trend and Bismarckian traits, the minimum income policy was introduced in 2005 by the 4th reform of the Hartz Law [54]. This policy has a multilevel social follow-up: on the one hand, the central public employment services and, on the other hand, the municipalities that must cooperate with each other in terms of compliance with activation measures. The cash benefit is dependent on a series of conditions described in the integration contract (Eingliederungsvereinbarung), namely active job search and acceptance of professional activities whenever proposed by local employment centers. In terms of local monitoring devices, Employment Agencies were created, which play a leading role in the socio-professional integration of beneficiaries, with the less active involvement of the local social, political and administrative sectors [55].

3.6.3. Western Europe

The UK was one of the first European countries to start the decentralization process under the influence of the neoliberal regime. The decentralization of the Welfare State began in the late 1990s with the devolution of legislative powers to Scotland and the respective constitution of the Scottish Parliament with full powers to legislate on the social field and the conditions of access to citizenship. However, the decision-making process and the action of local social partners continued to be limited, as a disguised decentralization, since the central power continued to exercise control until the end of the 1990s [40]. The creation of the Mais Employment Centers in 2002 marks the transfer of autonomy to coordinate the measures associated with the ICIP, centralizing all the benefits in a single local monitoring device. In this sense, the management of the ICIP is centralized, a power that has been extended to the local level, allowing the adoption of measures that almost exclusively promote professional integration. In England, administrative power was transferred to the regions, showing little significant impact in terms of the effectiveness of social policies. With the enactment of devolution agreements between central and local authorities in 2015 and 2016, the fiscal power, design and implementation of employability and health programmes, management of European funds, management of education, support for the business sector and land management [56].

The asymmetric decentralization process in the United Kingdom increases the fragmentation of the territory due to the different levels of autonomy delegated, translating into

territorial inequalities in terms of generosity and the budget amount spent on social protection, levels of legislative power and the implementation of social policies, with Scotland standing out in terms of the value of social benefits, the conditionalities associated with the social provision and the quality of access to citizenship services available, compared to Wales and England [57].

3.6.4. Mediterranean Europe

In Greece, Italy, Spain and Portugal, the design and implementation of social policies based on the logic of activation differ between these countries, with European integration, more specifically the Recommendation of the European Council in 1992, being one of the main external forces for the welfare state reform [22,58].

In the case of Greece, unlike Portugal and Spain, it did not have GMR measures on a non-contributory basis in a consolidated manner at the end of the 20th century [22,59]. In 2016, the pilot project implemented previously underwent readjustments and gave rise to the Social Solidarity Income⁴ (RSS), intended for people in extreme poverty in 30 municipalities. In 2017, it was expanded to a national scale under the leadership of the government by Alexis Tsipras [60]. RSS integrates three components: access to monthly income, social integration and social activation services. The implementation of the RSS results from the transfer of competence to assess the household's eligibility criteria and follow-up in terms of access to citizenship support services and the activating component to the regional scale. The measure is carried out at the central level by the Ministry of Labour, Social Security and Welfare and the Ministry of Finance. However, the RSS works mainly as a welfare measure since integration and social activation services are deficient and, in some municipalities, absent [61,62]. Despite access to citizenship services integrating actions to promote education, the labor market does not absorb these beneficiaries, depending mostly on precarious and/or informal employment.

In the 1977 reforms, Italy began transferring competencies to the regional level. The regulation of power continued to be centralized, with the transfer of competencies for social action only being regulated in mid-2000, allowing the outlining of intervention at the local level. During this 20-year period, there was an arbitrary intervention based on general principles, leading to the creation of regional policies that promoted political-territorial fragmentation, overlapping policies and increasing regional disparities, putting democratic power and the process at risk because of decision-making by political actors [7]. The *Reddito di Inclusione* (RI), created in 2018, was replaced in 2019 by the *Income for Citizenship* (*Reddito di Cittadinanza*)⁵, the latter with a larger budget allocation, more inclusive and without a time limit, presenting itself as more robust in terms of activation measures, contrasting with the Italian labor market. The beneficiary has the duty, under penalty of penalty, to sign a Pact for Employment and a Pact for Social Inclusion, to accept at least one in every three professional offers and to be available for socially useful activities. Excessive constraints, especially in the area of employment, make it difficult for beneficiaries to effectively integrate into the labor market, encouraging their integration into precarious, underpaid jobs far from their area of residence [63]. In Italy, the decentralization process reinforces the role of local services, both in terms of generosity and in terms of social support, given the fragmentation of central power, giving responsibility to the regions to implement and manage the ICIP, which is dependent on resources available [63].

In Spain, the determining aspect for the effective development of the Welfare State was the decentralization of administrative competencies to the regional level. The process of regionalization and transfer of powers to the autonomous communities is based on a hierarchical institutional arrangement in which the regions have the power to implement and administer active social policies within the legislative and fiscal power that the Central State exercises [64,65]. With a markedly top-down approach, central power favors multilevel intergovernmental cooperation through the creation of regional support devices, contributing to territorial cohesion [47,65]. The reform based on the welfare-mix model incorporated third-sector organizations as agents that facilitate access to social services.

During the period 1989–1995, the autonomous communities created programs of minimum insertion income (Rentas Mínimas de Inserción—RMI) that combined financial provision with the adoption of measures conditioned to social insertion, following the principles of the workfare model, with the aim of integrating socioeconomically excluded people into the labor market and into society [66]. The economic recession of 2008 and the decentralization of social action competencies to the 17 deeply unequal autonomous communities led to the implementation of ICIP with different eligibility criteria, levels of coverage and differentiated activation programs, considering the resources and local devices available, leading to the increase in territorial inequalities. Although the RMI is considered an important and effective tool to combat poverty and social exclusion in some autonomous communities, such as the Basque Country, the Foral Community of Navarra and the Principality of Asturias, it encounters limitations mainly due to its difficulty in adjustment to different levels of territorial cohesion and the absence of coordination mechanisms that guarantee the creation of a social model that contemplates territorial differences [67,68].

The trajectory of the ICIP in Portugal moved from its centralization to a welfare mix model. The mutations of this policy, from its creation as the Minimum Guaranteed Income (RMG) in 1996, until its replacement by the Social Insertion Income (RSI) in 2003. The RSI follows the logic of activation and materializes in insertion contracts and in a multilevel approach. It is defined as support reserved for people in situations of extreme poverty, consisting of a cash benefit and an insertion program, materialized through an insertion contract aimed at the social, professional and community integration of the members of the household [69]. Based on a logic of activation and workfare, RSI sees social, labor and economic insertion as a means of achieving professional stability. This process, which is contractual, establishes a horizontal relationship between the parties and simultaneously assumes equal and effective opportunities [70]. However, the RSI does not take into account territorial differences with regard to the fulfillment of actions contractualized in the insertion contract since the regions do not present a homogeneous distribution of access equipment to citizenship, and the population residing in non-metropolitan areas presents different sociographic characteristics, contrary to the beneficiaries of the metropolitan areas, with the need for adequate responses to the specificities of the beneficiaries and the creation of positive discrimination in terms of access to support equipment for the exercise of citizenship and inclusion in the labor market [71]. In this sense, the ICIP has shown limitations in their effectiveness due to low administrative capacity and demographic and economic differences and the centralization of social services, influencing the insertion trajectories of beneficiaries [72].

4. Discussion

The present article shows that the Welfare-State's new paradigm has been creating new arrangements for social functions through a decentralization process that led to the transfer of power, competencies, and responsibilities to the territories, maintaining the link with the central power in a logic of making the state responsible for its role and, at the same time, guaranteeing of the principle of subsidiarity. The process of decentralization and transfer of social welfare mechanisms to regional dimensions occurred simultaneously with the continuity of centralization of some dimensions of social protection in the central power (receipt, financing, planning and attribution/concession criteria), translating into the idea of the Local Welfare State. The structure of social intervention by the Welfare State follows new methodologies, including collaborative action and shared project methodology, which makes civil society co-responsible in a logic of sharing competencies. In the context of activation policies, key elements of decentralization promote the devolution of decision-making power to the territories so that they can, in a flexible and individualized way, promote the social and professional inclusion of heterogeneous groups through the contextualization of responsibilities and obligations, with local authorities having to be aligned with the national strategy [73–75]. ICIP territorialization can constitute an obstacle to the right of equal access to all goods and services since the conditions of support for the exercise

of citizenship tend to be centralized, leading to the fact that, depending on the territory, the beneficiaries have different opportunities and conditions for social and professional insertion [22,37,71]. ICIP impact may vary according to the decentralization model:

1. In the decentralization model, based on the principle of vertical subsidiarity and, simultaneously, on horizontal intergovernmental arrangements in which the decision-making, administrative and fiscal process is transferred to the regional level, and there is no intervention by the central government, the regions have the autonomy to regulate, implement and supervise the ICIP, resulting in different eligibility criteria and social integration services in the territory, creating deep territorial inequalities.
2. As for the decentralization process based on the hierarchical model, the state holds legislative and fiscal power, and based on the logic of centralism and intergovernmental cooperation, it gives the autonomous communities the power to implement specific policies and evaluate measures to support the ICIP [76]. Hierarchical decentralization is more effective in terms of maintaining territorial cohesion since it establishes the framework law, and the regions have the autonomy to formulate their specific policies around national objectives, which are subject to monitoring by coordination and cooperation mechanisms at the central level and across the whole territory [77].

However, ICIP territorialization has shown limitations in its effectiveness due to the low administrative capacity and the differences in demography, economics and centralization of social services, influencing the trajectories of insertion of the beneficiaries [72] since different levels of territorial cohesion translate based on different potentialities, available resources and strategic partners, which influence the insertion process and the design and implementation of social interventions [78].

5. Conclusions

ICIP territorialization involves the different levels of territorial cohesion that interact differently with the constraints of social and professional integration inherent to these policies [37,42,57]. Bibliometric analysis showed that the number of publications on this topic has increased, especially since 2004, and the number of citations also follows this growth. As for the distribution of publications by country, Europe has the highest percentage. Regarding cluster analysis, the distribution of co-citations allowed the grouping of references into four clusters. In the first cluster, there is a need to reconfigure the Welfare State, considering the changes in the political, macroeconomic, and family systems in European countries. The second cluster addresses the transition from the welfare model to the workfare model, replacing the assistance paradigm and integrating the activation component in the ICIP through the formation and integration of human capital in the labor market. The third cluster concerns the new social risks of contemporary society and post-industrial socio-economic transformations, dictating the reform of social protection mechanisms based on the creation of cooperation networks at different levels. The fourth cluster is directly linked to the research question and exposes the virtues of decentralization and territorialization of ICIP. This tendency is a key feature of ICIP, present in most European Union countries, albeit with some paradoxes, considering its applicability to the various welfare state models and the level of territorial cohesion in each country. Key elements for an effective ICIP territorialization are considered the payment of generous social benefits, the strong activating component aimed at integration in the labor market, and the delegation of competencies to local partners. These factors are identified as promoters of a significant reduction in the unemployment rate and the effective reintegration of beneficiaries into the labor market. The horizontal decentralization model, despite allowing for greater flexibility in the execution of the ICIP, contributes to territorial fragmentation in European countries with significant regional disparities. On the other hand, the hierarchical decentralization model, based on multilevel governance, limits local flexibility but presents greater resistance to territorial variation.

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Appendix A

Table A1. Most co-cited references per cluster.

Cluster	Author	Article	No of Co-Citations	Method
1	[17] Esping-Andersen, G., Gallie, D., Hemerijck, A., & Myers, J.	Why we need a new Welfare State?	6	Qualitative
	[78] Giddens, A.	The third way: the renewal of social democracy	6	Qualitative
	[30] Pierson, P.	The new politics of the welfare state	6	Qualitative
	[22] Ferrera, M.	Welfare State in Southern Europe: fighting and social exclusion in Italy, Spain, Portugal and Greece	4	Qualitative
	[23] Beck, U.	Risk Society: towards a new modernity	4	Qualitative
2	[24] Esping-Andersen, G.	Social foundations of Postindustrial Economics	7	Qualitative
	[26] Torfing, J.	Workfare with welfare: recent reforms of the Danish welfare state	6	Qualitative
	[75] Van Oorschot, W.	Making the difference in social Europe: deservingness perceptions among citizens of European welfare states	5	Quantitative
3	[29] Esping-Andersen, G.	The three worlds of Welfare capitalism	21	Qualitative
	[30] Pierson, P.	Dismantling the welfare state?	5	Qualitative
	[31] Blossfeld, H., Buchholz, S., & Hofacker, D.	Globalization, uncertainty, and late careers in society.	5	Quantitative
	[32] Bonoli, G.	The politics of new social policies. Providing coverage against new social risks in mature welfare states	4	Qualitative
	[33] Lewis, J. & Giullari, S.	The adult worker model family, gender equality and care: the search for new policy principles and possibilities and problems of a capabilities approach	4	Qualitative

Table A1. Cont.

Cluster	Author	Article	No of Co-Citations	Method
4	[34] Ferrera, M.	The boundaries of welfare European integration and the new spatial politics of social integration	3	Qualitative
	[37] Finn, D.	Welfare to workfare: the local dimension	3	Qualitative
	[38] Gough, I.	Social assistance regimes: a cluster analysis	3	Mixed models

Notes

- ¹ Esping-Andersen is a sociologist and Professor of Sociology at the University of Bocconi, Milan and Professor Emeritus at the University of Pompeu Fabra. In 2009, he was appointed professor by ICREA—Academia. One of the most prominent publications in the area of social policy was the book, *The Three Worlds of Welfare State Capitalism*, also awarded by APSA's Aaron Wildavsky and by the Social Foundation of Post-industrial Economies.
- ² Pierson is a Professor of Political Science at the University of California, and from 2007 to 2010, he was Chair of the Department of Political Science at Berkeley. He is on the editorial boards of *The American Political Science Review*, *Perspectives on Politics* and *The Annual Review of Political Science*. His book, *Is Your Job Dismantling the Welfare State? Reagan, Thatcher and Politics of Retrenchment*, was awarded by the American Political Science Association as the best book on American national politics.
- ³ Bonoli is an economist, Professor at the University of Lausanne and member of the projects, “Coupled Inequalities” and “Vulnerability due to lack of employment: companies, inequalities and job loss”.

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