

Imported Policy Ideas and the Initiation of Institutional Change: The Borrowing and Implementation of Workfare in Israel

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This paper analyses the institutional and political processes that led to the borrowing and implementation of workfare policy ideas in Israel. The workfare program was launched in August 2005 as an experimental program designed to reintegrate working age recipients of Income Support, General Disability and Child Support Allowances into the labor market.

I suggest that imported policy ideas initiate institutional change by *displacement though metaphorical invasion* (Streek and Thelen 2005, p. 21) in situations of deep intra-state conflicts over the goals and instruments of social policy.

Through the analysis of policy documents and interviews with policy makers, I analyze how the institutional processes that brought about the simultaneous increase in social assistance expenditures and rolls during the 1990s, along with the gradual depletion of policy instruments to deal with long term unemployment and poverty amongst different sections of the Israeli population, were interpreted by policy makers as a deep crisis of the policy paradigm. I center on the narrative construction of the crisis, and on the ways that it generated conflicts between different state agents over the proper instruments and agencies supposed to solve the crisis. I suggest that policy ideas and strategies imported from abroad were mobilized by powerful institutional actors so as to impose their vision of welfare governance, and to overcome the stalemate created by differing visions of and interests surrounding the instruments of social policy, and eventually over the whole social policy paradigm.

This paper is divided into three sections. The first section discusses the literature on the diffusion of workfare and links it to the literature dealing with the role of ideas in institutional change. In this section I suggest that imported policy ideas come into play when conflicting narratives of crisis create an institutional stalemate, where none of the narratives is able to win the ideational contest that would pave the way for

institutional change. Imported policy ideas backed up by powerful institutional actors and recognized success abroad create a space for an 'ambiguous consensus', thereby setting the scene for the displacement of old policy goals and their replacement by new ones.

The second section presents the historical institutional context that brought about the borrowing of American workfare ideas in Israel. In this section I highlight the agents who were involved in the narrative construction of the crisis of the social policy paradigm for dealing with unemployment. I also show how, in the process to solve the perceived crisis, the social programs (mainly those providing subsistence allowances and unemployment benefits) became the focus of intense conflict and explain how and why imported policy ideas contributed to the formation of an 'ambiguous consensus' that substituted old policy goals with new ones, and eventually lead to the introduction of new programs and new organizations for their delivery, or what is usually called layering.

The paper concludes with an analysis of the impact of borrowed ideas in the initiation of institutional change and the relevance of the Israeli case to the understanding of these processes.

### **Workfare: Travelling Policy Ideas and Institutional Change**

The institution of workfare strategies and programs across different countries with varied social policy regimes has been interpreted by scholars as a change in the programmatic underpinnings of welfare states' safety net mechanisms (Handler 2004; Jessop 1999; Lodemel and Trickey 2000; Peck 2001; Shaver 2002).

The internationalization of workfare is explained by regulationists as an imperative stemming from a changed mode of capitalist accumulation (Jessop 1999). Such an imperative stimulates 'fast policy transfer between elites, based on a truncated and

technocratic reading of programme effectiveness coupled with truncated processes of policy evaluation and formation' that generates the 'internationalization of welfare policy regimes' (Peck and Theodore 2001, pp. 430, 433). Peck and Theodore tend to overlook the contested character of policy transfer and the ways in which it may enhance or hinder institutional change.

The internationalization of welfare has also been dealt with in the policy transfer literature. In this literature the proliferation of welfare programs and strategies across countries and social policy regimes is attributed to the active role played by international organizations (such as the OECD, the IMF and the World Bank). International organizations design models of action and modes of behavior to cope with similar problems under different circumstances. These models become socially and internationally accepted and generate a growing international consensus regarding best practices to cope with long term unemployment and swelling social assistance expenditures (Deacon 2001; Dobbin, Simons and Garrett 2007; Martin 2000; Trickey 2001). However, a growing international consensus does not tell us much regarding the conditions that enhance the diffusion of policy ideas, programs and strategies, and their implementation. Daguerre (2004, pp. 51-53) maintains that welfare policy ideas and strategies were easily imported from the USA to Britain due to shared ideas, similar welfare state institutions and comparable labor market structures. The imagery of institutional change implied by this model is a rather harmonious one, in which cultural schemas (i.e., policy ideas) that legitimize or are embedded in resources, social networks, etc. are un-problematically disembedded and re-embedded or recombined with other resources, thereby begetting institutional change (Clemens and Cook 1999). Yet other scholars underscore the political conditions of policy transfer. Policy lessons from abroad are adopted under conditions of political conflict between contending actors over the values, norms and goals of the welfare state in order to advance positions and/or to legitimate positions

already taken (Dolowitz 1998; Dolowitz and Marsch 2000). However, less emphasis is granted in this explanation to the role of local institutions in the mediation of institutional change. Instances of policy success and failure indicate that local institutions are not simply replaced by the diffusion of ideas, but that they play a central role in the ways that policy ideas, programs and strategies generate institutional change, or in processes of translation (Campbell 2001; Campbell 2004; Dobbin, Simons and Garrett 2007).

Historical institutionalism maintains that political institutions and previously enacted social policies structure the political behavior of bureaucrats, elected officials and interest groups. Social programs, once instituted, create constraints and limit the possibilities of institutional change ( see e.g., Pierson 1994 ; Weir, Orloff and Skocpol 1988). Margaret Weir (1992. 192) coined the term "bounded innovation" to understand the elective affinity between institutions and ideas, while emphasizing that the dynamics of policy feedback - i.e. "actions taken at one time can make some future perceptions and decisions more plausible than others" - may constrain and even make the translation of imported policy ideas a much more difficult task than conceived of by studies in policy diffusion and transfer. Less deterministically, Hall (Hall 1992) argues that institutions structure the flow of ideas and clashes of interests, thereby partially determining institutional outcomes. The flow of ideas is also constrained by what Hall (Hall 1993) conceptualizes as policy paradigms. In other words, policy paradigms are underlying assumptions that constrain what is imagined as possible and feasible in the process of policy making. Thus, in the case of policy transfer, existing institutions and policy paradigms may limit and even curtail policy transfer and the possibility of institutional change.

Historical institutionalism conceives of institutions as constraining and proscriptive, and acting as powerful filters for ideas. Accordingly, historical institutionalism 'is excellent for explaining how institutions create obstacles and opportunities for reform;

however, it cannot shine a satisfactory light on the policy ideas that influence legislative decisions' (Beland 2005, p. 4).

To cast light on the role of ideas in the initiation of institutional change, scholars have discussed *when* and *how* ideas generate change. Moreover, they have also stated *why* some ideas are more successful than others in the generation of institutional change.

Scholars centering on *when* ideas generate institutional change and/or a paradigm shift suggest that they do so under conditions of institutional failure. In more specific terms, in periods of economic crisis ideas reduce uncertainty, make collective action and coalition building possible, serve as weapons to delegitimize existing institutions, and, where they are successful, serve as new institutional blueprints (Blyth 2002, pp. 35-45). Missing from the above temporal explanation of the role of ideas in institutional change are the notions of crises and failures of existing institutions. Are crises and failures objectively given, following which ideas intervene to reduce uncertainty? Or do ideas play a central role in defining what can be seen as a failure of institutions and their consequent crises? Thus, for Blyth (2001, p. 11), ideas serve as diagnostic and prognostic devices in the space opened up by an existing crisis. Within this line of argument, ideas are not constitutive of crises. Rather, they affect the definition of the crisis only retrospectively and serve as diagnostic and prognostic devices. Colin Hay (2001) problematizes existing conceptualizations of crises as the objective accumulation of contradictions within a given system. Consequently, Hay maintains that in order to understand the role of ideas in institutional change we should "acknowledge the perceptual or discursive quality of the moment of crisis and hence to consider the processes through which competing narratives of crisis struggle for ascendancy in a battle to shape the course of subsequent institutional development" (Hay 2001, p.204).

Similarly to Blyth (2002) and Hay (2001), Beland (2005) builds a temporal-dialogical model seeking to explain how and when ideas matter in institutional change in general and in social policy reform more specifically. Accordingly, ideas (or problems) are central to the political construction and selection of problems to be included in the policy agenda and in the narrative articulation between policy legacies and current problems. Ideas play a central role in the diagnostic and prognostic stages of social policy reform. However, in order for ideas to generate institutional change, they have to be adopted by powerful policy entrepreneurs. Thus, ideas produce institutional change when powerful policy entrepreneurs seize opportunities, delegitimize existing social programs and promote new policy ideas.

Are all ideas endowed with the power to generate institutional change given their adoption by powerful policy entrepreneurs and given the proper opportunities? Campbell (1998, 2001, and 2004) suggests that different types of ideas have different effects on policy making. In other words, the structural features of ideas endow them with differing potential for influencing the policy making process and for initiating institutional change. Winning ideas are those that endow actors with the capacity to frame their policy alternatives in terms of broad cultural themes and to conduct symbolic contests. Winning ideas are those that "provide clear and simple solutions to instrumental problems, fit existing paradigms, conform to the prevailing public sentiment and are framed in a socially appropriate way" (1998:400).

As opposed to the instrumentalist and strategic leanings built into Campbell's conceptualization of winning ideas, Sommers and Block (2005) suggest that winning ideas are those that succeed in changing the very ways in which the social is perceived. They suggest that "ideas that undermine, dislodge and replace previously dominant ideational regimes are ideas that enjoy epistemic privilege, and epistemically privileged ideas are those that come equipped with their internal claims

to veracity" (Somers and Block 2005, p. 265). At the center of the ideational regime that brought about the transformation of welfare institutions in 19<sup>th</sup> century England and 20<sup>th</sup> century USA is the perversity thesis. They maintain that 'winning ideas' do come into play at specific moments in the temporal sequence leading from the crisis of institutional arrangements and policy paradigms to their replacement by new ones. It is in the transition from symbolic contests between competing narratives to the claim to hegemony by the former "extremists" that the internal structure of ideas – in this case the perversity thesis – comes into play.

Discursive or ideational institutionalism has specified when, why and how ideas generate institutional change. However, most scholars have centered on discourses and ideas suppressed by more dominant ones (Campbell 2001; Ridzi 2009; Somers and Block 2005). Do imported policy ideas display a similar dynamics? In other words, how do imported policy ideas generate institutional change, and under what conditions?

Thelen and Steinmo (1992, p. 17), suggest that institutions become objects of contestation as changes in their meaning and function set political struggles in motion. Palier (2005, p. 134) suggests a different sequence, arguing that this happens when institutions become objects of 'negative diagnosis about past policies' In other words, the changed meaning and functions of institutions do not precede contestation and struggle, but a definition of institutional failure may generate institutional conflict, contestation and eventually change. According to Palier (2005, p. 135), 'a shared sense of political failure is essential for gathering people on an alternative track of policy [...] As long as the problem is not perceived in the same way, it is difficult if not impossible, to change the course of action.' Building on these insights and those of ideational institutionalism, this paper suggests that different negative diagnoses of past policies may beget different narratives of crisis and



generate institutional conflict and stalemate. Imported policy ideas clear the space for the creation of an ambiguous consensus through metaphorical invasion (Streek and Thelen 2005), thereby paving the way for institutional change. In more specific terms, in situations of intense competition between institutional actors over the goals and instruments of social policy, imported policy ideas actively promoted by powerful policy entrepreneurs may pave a way out of the stalemate and bring about a shared definition of the crisis and the ways to resolve it. Imported policy ideas are necessary but not sufficient conditions; they initiate institutional change when promoted by powerful policy entrepreneurs who are able to present evidence that they have worked successfully elsewhere (Beland 2005; Campbell 2004).

### **Organizational Inefficiency, Swelling Social Assistance Rolls and Moral Panics: Paving the Way for the Need for Reform**

From the mid 1980s and throughout the 1990s, unemployment grew in Israel. Unemployment growth during this period has been attributed to changes in the Israeli political economy, persistent recession, and the massive wave of immigration from the Former Soviet Union. Due to changes in Israel's political economy, and within the context of a nearly hegemonic neo-liberal rhetoric of liberalization, state reduction, and labor market deregulation, the unemployment insurance system and employment services were singled out as one of the most pressing problems on the national agenda (Rosenhek 2004, p. 88).

In 1993, a section of the State Comptroller's Annual Report was devoted to the inadequacies of the Labor Exchange Service. The State Comptroller attributed them to a variety of factors, the most important among them being the Service's loss of exclusivity in its role as a mediator between employers and job seekers. In 1991, private employment bureaus were recognized by law, thereby creating alternatives to the public labor exchange service. The State Comptroller remarked that not only did the labor exchange service not revise its role in light of this new competition with other

agencies, but also that, over the years, the service's resources had shrunk while some of its functions contradicted one another (Koreh 2001; State Comptroller 1993). From 1972, the labor exchange service had been in charge of administering eligibility tests for the short term unemployed, and from 1982 for administering eligibility tests for the long term unemployed and working age recipients of social assistance benefits. Moreover, the labor exchange service was also responsible for issuing work permits to non-Israeli workers and setting quotas for employers of migrant workers. The report addressed other issues, such as the decreasing number of available jobs registered at the labor exchange offices, the decreasing number of unemployed workers being connected with employers through the labor exchange offices, and the low credibility and trust of employers in the labor exchange service. The State Comptroller's report suggested that mounting contradictions (multiple logics) and a lack of resources were responsible for the failure of the Labor Exchange Service to fulfill its mandate as an intermediary between employers and job seekers. The targeting of the labor exchange service and of unemployment benefits that it was said were breeding a culture of "comfort unemployment" (State Comptroller 1993) were reflective of wider changes in the Israeli political economy and in the balance of power between state institutions, as well as of the emergence of new middle classes.

The State Comptroller's report can be taken as the first step of a moral crusade initiated within the boundaries of the state bureaucracy and the political elites to restructure the boundary institutions of the labor market so as to reduce the extent of de-commodification (Peck 2001; Rosenhek 2004, p. 90) granted by unemployment insurance.

While institutional actors and politicians targeted unemployment insurance and the labor exchange service as the more pressing problems to be included in the policy agenda (Beland 2005), and as stepping stones in the social construction of crises of

existing institutional arrangements, and also suggested steps to restrict the access and level of benefits to unemployment insurance (Rosenhek 2004), social assistance expenditures and rolls increased as well. Throughout the 1980s and the 1990s, the social assistance scheme in Israel (*Havtachat Hachnasa*) went through a process of qualitative and quantitative expansion. Not only was there a growth in benefit levels, but more social categories were entitled to benefits. Passed into law in 1982, the Social Assistance Act entitled families and individuals in need and who were not covered by other income maintenance programs to a basic income (Gal and Doron 2000). In 1984, the average number of families receiving social assistance allowances was 14,328 per month, growing to 141,840 families in 2001 (Sherman 2007). The growth in social assistance expenditure has been attributed to the role played by the social assistance scheme in the absorption of the mass wave of immigration from the FSU and Ethiopia during the late 1980s and the early 1990s, as well as to fluctuations in the Israeli labor market during that period. The combined effects of waves of mass immigration and fluctuations in the labor market were long unemployment spells amongst the immigrants and also amongst veteran Israelis (Gal and Achdut 2007; Gottlieb 2001; King et al. 2001; Morgenstein et al. 2003; Sherman 2007; Swirski, Frankel and Swirski 2001). The deployment of the social security system for the sake of nation and state building, including the absorption of Jewish immigrants, is integral to long term policy legacies in Israel (Rosenhek 1998). Moreover, the expansion of the social assistance safety net can be interpreted as part of the state's commitment and responsibility for the economic well being of Israeli Jews and for the reduction of socio-economic inequality amongst them (Shalev 1999).

These contradictory trends – on the one hand the targeting of unemployment insurance and the public employment service and on the other hand the expansion of the social assistance scheme to cater to the needs of new immigrants – were to

become part of an institutional drama that eventually brought about the import of policy ideas from abroad. Underlying the institutional drama was a neo-liberal offensive against the welfare state in Israel, led by powerful institutional actors, such as the Ministry of Finance and the Bank of Israel (Rosenhek 2006).

In 1997 – amidst a new wave of unemployment – an inter-ministerial committee was appointed and mandated to explore alternatives to 'the current functioning of the labor exchange service.' Alternatives were to be sought to two of the main functions of the service – labor market mediation and the delivery and certification of eligibility tests for unemployment benefits. The committee's mandate also included the consideration of the possibility that private labor exchange offices and manpower resources companies would be given responsibility for the administration and delivery of eligibility tests for unemployment benefits (Koreh 2001; State Comptroller 2000).

According to different sources (Igal ben Shalom 2009; Kramer 2009; Shaviv 2009; State Comptroller 2000), the deliberations of the inter-ministerial committee were, from the outset, beset by conflicts between different institutional agents. While the 'negative diagnosis or critical conjunctures regarding past policies' (Palier 2005) were the *raison d'être* of the inter-ministerial committee, the various institutional actors did have different diagnosis of the nature of the problem. All participants agreed that the Labor Exchange Service was not fulfilling its mission - job placement – in times of soaring unemployment figures (Igal ben Shalom 2009; Koreh 2001; State Comptroller 2000). The representatives of the Ministry of Labor and Social Affairs and the Labor Exchange service suggested resolving the crisis through policy instruments such as the career retraining of unemployed professionals, vocational and professional training for those hit by structural unemployment, and public works for the unskilled and semi-skilled. Moreover, they suggested increasing and

improving the services offered to the unemployed by the Labor Exchange service (Igal ben Shalom 2009; State Comptroller 2000).

The Budgetary Unit of the Ministry of Finances pursued a much more radical course of action. They suggested conducting an experiment that would test the possibility and feasibility of the privatization of the labor exchange service, including outsourcing the administration and delivery of eligibility tests to private employment bureaus and manpower resources companies (Koreh 2001; Shaviv 2009; Shaviv 1999; State Comptroller 2000). Private employment bureaus were assumed to be more efficient in their treatment of the unemployed and more prepared to motivate them to prefer reintegration to the labor market instead of the full exhaustion of their unemployment benefits. Furthermore, granting the possibility to run the experimental program to a private concessionary rested on the assumption that competition between governmental services and a private agency in the placement of the unemployed would eventually improve the quality of public placement services (State Comptroller 2000, p. 458).

The proposed experiment (which was intended to create an alternative to the governmental labor exchange service) was not only an attempt to outsource labor market mediation services and eligibility testing for unemployment benefits, but it also expressed harsh criticism of the existing policy paradigm. What began as a vague mandate was intended not only to bring about change in the instruments of social policy (such as unemployment benefits and their administration), but also in the goals of social policy (the recalibration and re-regulation of the relations between social policy and the dynamics of labor markets).

The Ministry of Finance's proposal was based on a report submitted to it by a private consultancy and management firm. The full report, including the proposal to fundamentally change the goals and instruments of social policy, was submitted to

the inter-ministerial committee in August 1998 (Kramer 1998). The report – modeled on Wisconsin Works – suggested a market-oriented social policy paradigm that would eventually subordinate social policy to the imperatives of the market, thereby residualizing safety net programs and mechanisms (Peck 2001; Shragge 1997). The report acknowledged that the causes of unemployment were macro-economic, depending on fluctuations of the business cycle. However, it attributed soaring long term unemployment figures to the long term effects of the existing social programs, the social policy paradigm underlying them and the monopolistic status of the labor exchange service (Kramer 1998).

Apparently, the inter-ministerial committee was set up re-calibrate the instruments of policy making, but not its goals. However, allowing the establishment of private employment bureaus that would not only engage in labor market placements but also issue eligibility certificates for unemployment benefits, implied a further depletion of the already depleted authority of the Labor Exchange Service. At this point, a conflict over the meaning and function of the labor exchange office began to develop. The labor exchange service representatives strongly opposed the idea of the experiment to be conducted by a private concessionaire, while the Budgetary Unit of the Ministry of Finance demanded to commission the experiment to a private concessionaire and to implement it right away.

The inter-ministerial committee submitted its report in September 1998, and recommended that the Labor Exchange Service should maintain its status as a public service and retain its monopoly over the certification and delivery of eligibility certificates for unemployment and social assistance benefits. However, representatives of the Ministry of Finance opposed the recommendations and continued with their plan to run the experiment through a private employment bureau.

At this moment, the deliberations of the inter-ministerial committee stalled and the chair of the inter-ministerial committee resigned. Given the disagreements between the Ministry of Finance and the Labor Exchange Office, and the refusal of the Ministry of Finance to agree to the recommendations of the inter-ministerial committee, a new effort was made to reach an agreement. The ministerial committee on Administration, Consultation and Auditing decided that the inter-ministerial committee would submit a new proposal within three months to institute reforms in the labor exchange office that would be agreed upon by the Ministry of Finance, the National Insurance Institute and the Ministry of Labor and Social Affairs (Government of Israel 1998; Koreh 2001; State Comptroller 2000).

From this moment on, the two different narratives that were competing to define the nature of crisis, as well as the solutions to it, began to gain intensity. The inter-ministerial committee submitted a new proposal in December 1998. The new proposal acknowledged that the Labor Exchange Service works within a competitive environment made up of hundreds of private labor bureaus and manpower resources companies. The committee's report underscored the importance of the existence of a public, not for profit, organization providing labor placement services, given the profit orientation of private employment bureaus. The need for such a state-based organization was justified in terms of equal access to such services for all of the population, but especially its disadvantaged strata. It is this population that is in need of the services of the governmental labor exchange, as its chances of being placed by private companies are meager. The conclusion was that the Labor Exchange Service should expand the scope of the services it offers and delivers to claimants. Still, and conscious of the fact that 'services for poor people are poor services,' the proposal emphasized the importance of the monopoly of the labor exchange service over the delivery and certification of eligibility certificates for all claimants, even those in higher positions in the class ladder. The proposed outsourcing of the certification

and delivery of eligibility permits to profit making organizations was presented as conflicting with the defense of the social rights of citizenship. Aware of the alternative proposal submitted by the private consulting company to the Budgetary Unit of the Ministry of Finance, the inter-ministerial committee proposed a series of steps to activate the unemployed, first by changing the eligibility tests for unemployment benefits and secondly by motivating the unemployed to search for work more actively through private employment bureaus and the Internet, amongst others. This system of sticks and carrots was tailored to the short term or newly unemployed, while a system of immediate placement in public works was suggested for the long term unemployed (Government of Israel 1998; State Comptroller 2000).

In other words, the inter-ministerial committee admitted that the governmental Labor Exchange Service had to reconsider its operations in a changing environment, but this diagnosis did not lead to a prognosis that proposed a change in policy goals..

The drafters of the report acted as *bricoleurs*, i.e., they recombined elements of a set of already existing institutional principles and practices (Campbell 2004, p. 70).

*Bricolage* was a way to improve the position of the Labor Exchange Service in its struggle over institutional change. In this struggle, the Labor Exchange Service risked a further loss of power and resources (Campbell 2004, p. 176).

The proposal submitted by the "old-new" inter-ministerial committee was rejected by the Budgetary Unit of the Ministry of Finances on the basis that the committee's recommendations were not coordinated with the Ministry of Finance, and that they contradicted the government's decision to launch an experiment to be conducted by a private concessionaire. Moreover, the representative of the Ministry of Finance claimed that there was nothing in the proposal submitted by the inter-ministerial committee that pointed to a reform in the structure and functioning of the Labor Exchange Service. Furthermore, he doubted whether the proposed 'reform' would



indeed contribute to the more effective treatment of the unemployed, that is, by shifting the balance from the full utilization of the right to unemployment benefits to the integration into the labor market (State Comptroller 2000, p. 459).

The State Comptroller's report concluded that, from 1998 to 2000, an institutional stalemate had prevented the different ministries from reaching an agreement regarding the experimental program and that no changes had been made in the eligibility tests that would hasten the integration of the unemployed into the labor market (State Comptroller 2000, p. 459).

Behind the apparent stalemate, however, a burgeoning of activity was taking place. On the one hand, by 1999, the private consultant's proposal with its underlying policy paradigm had become the official position of the Ministry of Finance, and was later adopted as the official (though not uncontested) policy paradigm of the Israeli government. Moreover, the definition of the pressing problem to be dealt with shifted from unemployment to long term dependence on subsistence allowances. On the other hand, representatives of the Labor Exchange Service, under the mounting pressures of the then-crystallizing alternative proposal by the Ministry of Finance, began to consider changes inspired by imported policy ideas – in this case the experience of Wisconsin Works (W-2). This was the beginning of a new stage, in which imported policy ideas and programs paved a way out of the institutional stalemate.

Wisconsin Works was the inspiration for a series of official and semi-official documents in which the crisis of existing institutional arrangements as well as the proposal of a new policy paradigm were promoted to deal with the long term recipients of subsistence allowances. In a paper titled "From Income Security to Secure Employment", drafted at the Budgetary Unit of the Ministry of Finances, reference was made to an alternative scheme to the existing eligibility tests for

unemployment and social assistance benefits. The alternative scheme was said to contain an original and comprehensive approach to tackling problems of reintegrating the unemployed (and particularly the long term unemployed) back into the labor market and dealing with the dependence on subsistence allowances. The alternative scheme was based on original and cutting edge models developed in Western countries, as those countries were said to face problems similar to those in Israel: the perverse effects of the social security system and, as consequence, a deep dissatisfaction with the existing policy paradigm. Thus, from the outset, the policy paper attempted to construct the legitimacy of the alternative policy paradigm that it promoted on the perceived similarities between Israel and other Western countries (Dobbin, Simons and Garrett 2007, p. 6). The position paper was the outcome of a study trip made by representatives of different ministries and bodies that deal with the interface of social policy and the labor market: Finance, Labor and Social Affairs, the Labor Exchange Service and the National Insurance Institute. During the study trip the team visited Wisconsin, New York, Boston and Washington DC in the United States, and Holland and Denmark. Most of the report was devoted to the spirit of Wisconsin, as "there the reform was fully implemented and brought about a sharp decline in the number of dependants on welfare payments" (Shaviv 1999). Jason Turner, Mark Hoover (Human Resources Administration Commissioners and Deputy Human Resources Administration Commissioner at New York City respectively) and researchers at the Urban Institute were among the persons most cited in the report and those who hosted the Israeli team during their visit to different sites in the US (Shaviv 1999, p. 2-3; Zohar 2007, p. 52).

The spirit of Wisconsin was strongly felt in the simultaneous widening and sharpening of the purposes of institutional reform as proposed in the policy paper. Whereas, in 1997, everyone referred generally to the unemployed, a year and half

later the problem was not only the unemployed, but the long term unemployed and all groups entitled to subsistence allowances:

"Hundreds of thousands of working age Israeli inhabitants are out of the labor market nowadays and their numbers are growing steadily. The different types of subsistence allowances conceal the fact that numerous groups in Israel do not work or are not required to work in return for the allowances. The allowances take many forms: unemployment benefits, social assistance allowance, subsistence payments for new immigrants, child support payments, disability pensions, and torah students stipends, etc." (Shaviv 1999, p.6/17).

According to the policy paper, the growth in numbers of economically inactive individuals and families was the result of the universality of social rights and lenient and uniform eligibility tests that did not encourage individuals to work. Universal social legislation and lenient eligibility criteria resulted in growing numbers of economically inactive individuals and families, and growing welfare state expenditures. The policy paradigm was failing as it created negative incentives to work and a poverty cycle. The narrative of crisis of the existing policy paradigm was embedded within a neo-liberal discourse which decried the de-commodifying effects of subsistence allowance and associated the swelling welfare state expenditures with inefficient and expensive governmental structures that hampered the utilization of market mechanisms or even competition between state and market mechanisms. All attempts to redress the policy instruments were bound to fail, as strong workers' unions opposed change. The deleterious effects of the existing policy paradigm went further than swelling social assistance and unemployment rolls and the loss of productivity. The degree and depth of de-commodification allowed by social policy were an impediment to salary restraint and the main cause of 'social security traps',

as high labor costs led employers to fire Israeli citizens and inhabitants and to hire migrant workers instead (Shaviv 1999, 7-8/17).

The de-legitimization of the existing policy paradigm already contained the seeds of the new one. Therefore, instead of universality and de-commodification, the new policy paradigm should be based on selectivity. Selectivity was coupled in the new policy paradigm with workforce development through the reestablishment of the [lost?] connection between rights and obligations, or between 'income' and work. The philosophical underpinnings of the new paradigm were based on what Jason Turner told the Israeli study team at their meeting in New York:

"The welfare system as an institution is abhorred by society because it separated the recipient of income from the need to work [...] But why do we think of work as so necessary to legitimize income? [...] Work connects individuals to larger society- and in order for welfare's destructive influence to finally end, work and income must be permanently rejoined." (Shaviv 1999, p.6/17).

In order re-create the lost link between work and income, the eligibility for subsistence and other income support payments should be conditioned on a fast transition to the 'natural' labor market or to any other work related activities. It was also suggested to eliminate the 'automatic' eligibility for in kind services, and to link them to an individually tailored job-seeking plan. Whereas the former principles of the suggested reform addressed the 'need' to shape the behavior of former claimants and to turn them into job-seekers (Peck 2001), other principles addressed the organizational framework necessary to discipline welfare claimants. First and foremost was the establishment of a parallel or even alternative system of social service delivery detached from the 'public bureaucratic and political system.' Service delivery should be concentrated and targeted to fast labor market reintegration, and

as such it should avoid long term and specific professional training (Shaviv 1999,p. 3-4/7).

The document displayed some of the characteristics of winning policy ideas as it "provided clear and simple solutions to instrumental problems" (Campbell 1998:400) , but it had yet to win the symbolic contest. In the Israeli case, the symbolic contest was won by a *war of position* (Gramsci 2004) in which different institutional agents were exposed to the 'miracles' of the 'workfare' policy ideas and strategies in Europe and the USA. In other words, the strategy was to defeat opponents holding alternative narratives of crisis by exposing them not only to the ideas themselves but to their successful implementation elsewhere ( see e.g. Campbell 2004, p. 179). In February 1999, another team of high ranking Israeli civil servants and politicians travelled to Holland to learn about the workfare experience there. The study team was headed by the Director General of the Ministry of Labor and Social Affairs. In Holland the team met with Mr. Vink, the director of the welfare department at Helmond, the first city in which the workfare experiment was implemented. The Dutch workfare experience was said to be modeled on the Wisconsin Works scheme. Mr. Vink told the team that the W-2 strategy had also been emulated in Britain, New Zealand and Australia. Upon returning from Holland, a report was submitted to the future chair of the Commission for the Reform of the Treatment of the Long Term Unemployed under the Social Assistance Scheme. The report, titled "Policy Trends in the Netherlands and Ideas for their Implementation in Israel", presented the conditions that brought about the adoption of workfare ideas and strategies in the Netherlands and also emphasized the similarities between Holland and Israel. It was stated that these similarities – long term unemployment, welfare fraud and swelling social assistance rolls - guaranteed that the experimental program implemented in the Netherlands would suit Israeli needs as well (Kramer 2009). Moreover, the document stated that while the Dutch experiment was modeled upon the Wisconsin

scheme, "it was also adapted to the attitudes and needs there" (Zohar 2007, p. 52). This report strengthened the position of the Ministry of Finance and brought the Labor Exchange Service itself on board.

At this stage, the exposure of the staunchest of opponents – the Ministry of Labor and Social Affairs as well as the Counselor of the Labor Exchange chair - to policy ideas and strategies generated abroad was setting the ground for an ambiguous agreement between different institutional agents. This ambiguous agreement signaled the slow but steady movement of the imported policy paradigm to the center of the policy debate (Zohar 2007, p. 52). Moreover, as the imported policy paradigm and its implementation were defined as an experimental plan, its most threatening aspects to different institutional actors were removed. Imported policy ideas cast in terms of an experiment paved the way for an ambiguous consensus amongst institutional actors. This 'ambiguous consensus' was formed around negative feedbacks of the existing policy paradigm, and not in terms of newly emerging problems and needs (Palier 2005).

In March 2000, and following governmental decision 35, a commission for the reform of the treatment of the unemployed recipients of long term subsistence allowance was established. The mandate of the commission (popularly known as the *Tamir Commission*) was the planning of employment and placement centers, as an experiment, in four areas: the north and the south of the country, and the Tel Aviv and the Jerusalem areas. It was stipulated that employment and placement centers would operate according to a set of underlying principles, such as: "the obligation to work, study or engage in rehabilitative employment activity, as an employment test that grants eligibility for benefits". The appointment letter also specified that: "Social workers who have been authorized by the National Insurance Institute and/or the Labor Exchange Service to approve the eligibility for benefits will work at the centers.

Non-governmental expert agencies will also participate in the administration and operation of the centers." Having reached what Bruno Palier has called an ambiguous agreement over the goals of social policy, the committee's mission was to plan the policy instruments and to test them in an experimental program that "will last for two years, to monitor the implementation of the experiment and to submit its final recommendations, including changes in legislation, at the conclusion of the experimental period" (Yishay 2000).

The Tamir Commission's interim report was published in 2001. This report was central to the process of institutional change, as it already contained a consensual narrative of the crisis of existing institutional arrangements for dealing with the working age recipients of subsistence allowances. This narrative, already agreed upon by the different participants in the commission, was an almost exact replica of the policy document drafted at the Budgetary Unit of the Ministry of Finances (Shaviv 1999). This narrative of crisis not only diagnosed the malady (long term dependence on subsistence allowances), but also proposed ways to solve the problem that were the polar opposite of the old ways.

The second chapter of the interim report presented a detailed description of the massive increase in social assistance rolls from 1985 to 2001. The report showed a continuous growth in the rate of working families receiving social assistance over the years, the annual rate of increase being 12-13% in 2001. Most importantly, the report stated that social assistance recipients and expenditure grew independently of shifts in unemployment rates. Moreover, the increase in social assistance recipients was well beyond the growth of the population. The steep increase in rolls, expenditure and numbers were attributed to the structure of different social programs catering for the needs of recipients of different types of allowances, but mainly social assistance ones. Contrary to previous reports (Shaviv 1999) that included data on the sharp

decline in social assistance rolls in the USA as a result of the implementation of PRWORA and TANF as evidence of the success of the ideas underlying the reform there, the Tamir report contained selected data based on research reports produced by the National Insurance Institute and the Joint-Brookdale Institute (King et al. 2001) that dramatized the crisis of the existing policy paradigm and served as focusing events (Beland 2005, p.7). In addition, the Tamir report presented a sophisticated version of 'the poverty to perversity conversion narrative' , i.e., "the assertion that policies intended to alleviate poverty create perverse incentives toward welfare dependency and exploitation, and thus exacerbate the very social ills that they were meant to cure"(Somers and Block 2005, p. 265). Thus, before displaying 'hard' statistical data, the report stated:

"The population of unemployed working age recipients of long term subsistence allowances or benefits is composed of different groups that are eligible to different programs ensuring them a social and economic safety net. Programs such as disability insurance under the social security law, child support payments under the child support law, social assistance for the poor under the social assistance law, etc. The common denominator of these programs is their drift over the years to income security instead of focusing on a safety net that would promote the transition to self support and the achievement of social well being within the framework of employment." (Tamir 2001, p. 27).

The de-commodifying leanings of the social security system were made responsible not only for the increase in expenditure but also for the economic dependence of recipients on the public system and their resulting exclusion from society. As a result, recipients of subsistence allowances were described as lacking opportunities to improve their situation and to take advantage of existing opportunities. Many of the welfare reliant individuals were described as still motivated and willing to work to



support their families and themselves, to contribute to society and to provide their children with a positive role model. Concomitantly, the welfare reliant population was portrayed as disadvantaged in terms of the personal resources needed in order to be integrated in the labor market (such as education, occupational skills and work experience), but in need of a rapid reintegration into it so as to extricate itself from a dependency-based life style. De-commodification was linked to the aimless and dispersed character of the existing mechanisms to deal with the unemployed, and to the lack of a clear policy regarding the reintegration of the unemployed to the labor market. All of these condemned the unemployed to a life of dependency, disregarded the needs of employers, and forced them to import labor migrants (Tamir 2001, p. 8).

The proposed experimental plan was designed to avoid the ills of the existing system, and to test the ways to remove the policy monopoly and entrenched policy legacies that stood in the way of the implementation of new policy goals (Beland 2005; Ridzi 2009; Somers and Block 2005).

The committee recommended the establishment of employment bureaus operating as *one stop centers* in the areas included in the experiment. The employment bureaus or *one stop centers* would concentrate in one place the authority, instruments and responsibility for the treatment and delivery of services to the relevant population, from the initial filling out of a claim to social assistance, to the integration in the 'natural' labor market or in work related activities. Thus claims filling, eligibility tests, screening, vocational assessment, referral to the labor market and to work related activities were to take place at the same place, thereby circumventing the Labor Exchange Office and the local branch of the National Insurance Institute. Services such as short term basic vocational training, supplemental education, training and guidance in seeking employment and persevering in it (the learning of soft skills) were also to be concentrated at the one stop centers so as to tailor them

to the improvement of the participants' occupational capabilities and skills and in order to effect a short and fast transition to work or employment, preferably in the 'natural' labor market.

A new role, that of the case manager, was introduced as a means to implement the transition to the labor market. The case manager's role was to draft a personal occupational plan. Part of the participants' obligations were to agree to this individually tailored occupational plan. More importantly, agreeing to the individually tailored occupational plan and actively participating in it were a condition for the continued receipt of social assistance allowances. Though eligibility certification would remain the prerogative of the Labor Exchange Service officers, the case manager was to play a central role in the process of establishing whether the claimant had complied with the occupational plan or not, and would eventually substitute the Labor Exchange Office, as he was the only person who would and could establish whether the 'client' had cooperated and fulfilled the goals of the occupational agreement. As part and parcel of the establishment of a tighter relationship between services in kind and participation in the labor market, the report recommended that *one stop centers* should be in charge of the provision and delivery of work related or work supporting services, such as transportation subsidies, child care services, and so on (Tamir 2001, pp.15- 18).

The initial mandate of the Tamir commission was to design the program for recipients and applicants for social assistance benefits deemed as "unplaceable". However, during the deliberations of the committee a shift towards the expansion of the program to include other categories of benefit recipients could be observed. Thus, in the section specifying the target population, the Tamir Committee's interim report stated that the goals of the experimental program were more ambitious than the treatment of the 'unplaceable' long term unemployed. The experimental program

was eventually to include 'the different categories of actual recipients and future claimants (within the experimental centers) of income security (*havtachat hachnasa*), such as mothers of young children and the unemployed, general disability and recidivist unemployment benefits claimants' (Tamir 2001, p. 19). The committee eventually decided that in the first stage only the unplaceable would be included in the program, and that the unemployed and mothers would be included only in the second stage. The final stage would cover all working age recipients of subsistence allowances and income support programs (such as unemployment benefits and general disability).

While the program was to be implemented by the end of 2001, it took another 4 years until it was finally launched. The experimental program was launched in four areas of the country in August 2005.

The years that elapsed between the submission of the interim report and the implementation of the experimental program were characterized by the steady elaboration of policy instruments, as well as the resolution of the specific welfare mix through which the experimental program would be run. Moreover, a series of programmatic changes were instituted in different programs so as to reduce the automatic eligibility for benefits in kind attached to the social assistance allowances, and deep cuts in cash benefits were effected (Gal and Achdut 2007). However, by that time nobody questioned the new policy goals. The governmental bureaucracy seemed, for different interests, reasons and visions, to support the experimental program with its underlying policy paradigm. Thus, displacement by metaphorical invasion took place at the level of policy goals. During the years that elapsed between 2001 and the implementation of the experimental program, local actors actively cultivated 'imported' institutions and practices.

The experimental program was finally launched in August 2005. The program that was ultimately instituted was harsher than the version of tough love promoted by the Tamir Committee's interim report and other policy documents. In an ambience of mounting criticism, the experimental program was reformed in 2007 so as to avoid its most excessive measures. However, the reforms were mostly intended to improve the already triumphant policy ideas and not to question them. Today the experimental stage is over, and effective steps are being taken to expand the program and implement it all over the country.

If conflicts amongst institutional agents persist, they are not over the goals to be achieved, nor over the instruments of social policy, but over which institutional agent will reap the benefits of the changed policy paradigm. At present, the metaphorical invasion that enabled the ambiguous consensus has given way to what Thelen and Streek { 2005 #128, p.22-24} have dubbed as layering.

### **Conclusions: From displacement by metaphorical invasion to layering**

The transfer/diffusion of workfare policy ideas has usually been analyzed taking into consideration countries belonging to the same policy regime (Cebulla 2005; Daguerre 2004; Dolowitz 1998; Kingfisher and Goldsmith 2001; Peck 2001). To date, less research has been devoted to the transfer/diffusion of workfare to countries so different as Israel and the USA in terms of their social policy regimes, the size and scope of their economies, and the state of their economies at the time of implementation of the workfare strategies.

This article analyzed the socio-historical circumstances that paved the way for the import of workfare policy ideas and the role that imported ideas and strategies played in the process of institutional reform. My argument has been that imported policy ideas created a space in which an ambiguous consensus was created between

different institutional agents over the meaning and function of social programs designed to cope with unemployment in general and long term unemployment and poverty in particular. Borrowing policy ideas from abroad enabled powerful institutional entrepreneurs, such as the Budgetary Section of the Israeli Ministry of Finance, to impose their conception of welfare governmentality and to slowly bring about the delegitimization of entrenched policy legacies and policy monopolies.

The late-1980s and the 1990s were years in which the Bank of Israel and the Ministry of Finance launched a neo-liberal crusade against the welfare state (Rosenhek 2006). As part of this neo-liberal offensive the Ministry of Finance seized opportunities, such as the steady increase in unemployment figures and claimants of unemployment benefits, to institute changes that would minimize the de-commodifying effects of unemployment insurance. However, the attempt to change the meaning and function of the unemployment benefits program and the Labor Exchange Service brought about an institutional struggle and conflict over the very meaning and function of these social programs and the mode of their delivery. Different institutional actors developed alternative narratives of crisis in an attempt to win the ideational contest and to shape the direction of institutional change. Despite its institutional power and leverage, the Ministry of Finance did not succeed in winning the ideational contest, and an institutional stalemate ensued. The reframing of the policy ideas of the Ministry of Finance in terms of policy alternatives developed and successfully implemented elsewhere were crucial in breaking the institutional stalemate and paving the way for the displacement of old policy goals and their gradual substitution by new ones.

The Israeli case provides an example of how, when and probably why imported policy ideas generate institutional change. In the case analyzed, imported welfare ideas broke the stalemate created by competing narratives of crisis and paved the

way for a new consensus that allowed the initiation of a gradual but transformative institutional change. This institutional change that began by metaphorical invasion, thereby displacing entrenched policy goals, gave way to layering, the gradual introduction of amendments, changes and additions to most of the programs catering to the needs of the long term unemployed and other recipients of subsistence allowances in Israel.

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