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Beyond social policy? 'patchwork' livelihoods

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Social policy has had a chequered career over the last half-century. Initially developed in Northern European and North American metropolises, with its roll-out intentionally restricted to those contexts and denied to people living in the more peripheral settings, including those which Northern countries had colonized (Cooper, 1997), it has since significantly shrunk or mutated in its original heartland while simultaneously diffusing and proliferating in formerly colonized and/or more 'peripheral' countries (albeit in emaciated form). The new shapes it takes, especially in these latter settings since the 'neoliberal turn', is what this Special Issue explores.

According to economic historians and other social scientists, the three items necessary for economic growth are workers, capitalists and the state (see Freund, 2010). If workers and capitalists have had an uneasy and often adversarial relationship, the state has both acted on behalf of capitalists/the market, and intervened to ensure that workers are compensated for those disadvantages for which capitalists and the market have been responsible (Elster, 1991: 273). That is, redistributive social policy in its classic form has been seen as a process set in motion by non-market initiatives (often the state) to counteract the iniquities produced by the market, especially by exploitative labour relations. But recently, for reasons laid out in this volume, even as 'global social policy' has unfolded, workers have been increasingly excluded from formal, state-run redistributive schemes or have found themselves pushed towards those in which the market has primacy. Alternatively, they have had to seek refuge in the informal economy (Raphael, this volume), or forms of solidarity provided by family, kinship or community.

Social policy, like the first instantiation of a welfare state, was an invention of the Bismarck government in late 19th-century Germany (Chang, 2022). Centred on workers' rights and employment-based contributory social insurance programmes (Leisering, 2021), it was designed less to enshrine radical-style worker politics than to contain these and to undermine support for socialism. A later model was developed by Beveridge, British designer of the UK's post-World War II welfare state. Like Roosevelt's New

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Deal, it encompassed a more universalist vision of social security, education and health, including the unemployed. For the following 30 years, the outcome of labour struggles saw workers' rights in the more prosperous Western countries buttressed and the well-being of those without work assured. Nevertheless, the welfare state was 'the exception rather than the norm, even in Europe' (Sanchez and Lazar, 2019).

But what about countries from the Global South? These were linked to metropolises by histories of rights and entitlements alternately demanded and refused. Metropolitan governments, recognizing that establishing European-style welfare states in these colonies was hardly feasible, withdrew and – in seemingly cynical mode – 'granted' them independence (Cooper, 1997; Ferguson, 2015: 72–73), sometimes prompting the subsequent migration of their inhabitants to metropolitan heartlands.

But did the Euro-American system of social welfare take root in other settings? Georges (this volume) describes how, in Brazil until 1988, it was the 'Bismarckian' model of welfare, involving 'rights deriving from the status of employee' and 'associated with formal work', that prevailed (see also Leisering, 2021). In other Global South settings, like South Africa, a robust welfare system was developed to address problems of poverty during the depression. It was, however, racially skewed and excluded the majority of the population, notably migrant Black workers on whose labour the mining industry depended (Ferguson, 2015). The later development of a 'Beveridgian' model – and eventually a cash transfer system – in Brazil saw *citizen* rather than *worker* rights take centre stage (Georges, this volume), as did South Africa's post-democracy adoption of 'social grants' (Fouksman & Dawson, Webb & Vanqa-Mgijima, this volume). But in both cases, support, although more universal, was also narrower. It centred on cash and excluded comprehensive provision of services.

Many of the papers here take the line that social policy has thereby morphed into something that barely resembles its earlier iteration/s. But it should be borne in mind how short-lived and geographically restricted those original welfare states actually were. In being shipped to other shores, such models have – despite or perhaps even *because of* responsiveness to populist demand and their strategic use as a means to enhance political legitimacy, perhaps as in Bismarck's original design – ended up excluding many, especially internal or transnational migrants, from gaining access (Plomein & Schwarz, Arnold & Blau, this volume). And the form social policy takes – cash payments – often 'commodifies' welfare by making individual recipients responsible for funding their own life beyond the wage, and leaves them vulnerable to the purveyors of loans. Several papers here show how individuals find themselves with little alternative but to borrow money (Arnold & Blau, this volume) or have their welfare payments repurposed as loan collateral (Webb & Vanqa-Mgijima, this volume). Another angle explored by Dawson & Fouksman (this volume) is that authorities distribute restricted payments under the rubric of 'crisis', thus avoiding more far-reaching reforms.

In those Global South settings where cash payments *are* available, the decisions of street-level bureaucrats can introduce new conditionalities where these might not exist at state level. Lammer's paper (this volume) shows that using income as a criterion did not prevent village officials from using their own discretion to include other criteria. In other cases, bureaucratic conditionalities can sometimes make it necessary for people to opt

either for this state-administered redistribution *or* informal economic activities/family support, making things tricky for those needing to retain both.

Some of the impetus for this volume comes from settings in the global south where welfare systems were never fully developed or have been substituted by cash transfers. Ferguson (2015) and Ferguson and Li (2018) claim that, rather than trying to squeeze more and more people into an ever-smaller category of the employed, a new politics of distribution – involving cash transfers or basic income grants – would enable a world of well-being based on an acceptance of dependency, accompanied by political demands for the ‘fair share’. This seems to suggest the disappearance of paid labour, but several of the papers in this volume suggest that wage work – or work that is informal but nevertheless paid – remains a crucial component of livelihoods, and is inextricably linked to the distributive aspects normally thought of under the rubric of ‘social welfare’.

Implied here, and pursued by various other anthropologists, is an important point: work in the Global South has ‘always-already’ been precarious (Parry, 2018; Sanchez and Lazar, 2019) with life having become one bereft of wages as austerity policies were implemented, as immaterial and intermittent labour became prevalent, as firms moved abroad and/or as value was extracted from labour well beyond the wage relation (Casas-Cortès, 2017, cited in Sanchez and Lazar, 2019: 4). Alternatively, but with similarly distortive effects, dependence on wages may have deepened, as workers have found themselves compelled to work ‘overtime’ to keep body and soul together (Luong & Nguyen, this volume). In many places, livelihoods have become dependent on market mechanisms in ways that ‘commodify’ welfare provision. Hence, those (partly or wholly) deprived of wages and subjected to increasing precarity have started to count on either kinship support or patronage networks – reliance on which can promote dependency and an unwillingness to challenge the status quo (see Parry, 2018). Lives appear, in some cases, to have become ever more thoroughly penetrated by the mechanisms of financialized capitalism, whereas in others, they appear to have slipped beyond its reaches, relying instead on what look almost like pre- or non-capitalist arrangements.

Marxist social scientists have spoken of activities such as small-scale family farming, apparently conducted outside of recognizably capitalist frameworks, as in fact subordinate to those frameworks. Such kinship-based or informal activities, they argue, serve to subsidize capitalists by allowing them to pay wages lower than those required for the reproduction of the labour force (Breckenridge, 2021). Feminist anthropologists similarly argued that domestic labour, framed as taking place within the boundaries of home-based groups and separate from the wider world of paid work, was in fact essential to the functioning of that world. Non-commodified activities – often seen as precapitalist – were subsumed by commodified, capitalist formations, household labour seen by such analysts as intrinsic to capitalism and exploited by it (Zaloom and James, 2023). Once that reproduction started to be provided through more formal redistributive mechanisms, such as state-provided welfare payments or welfare provision, one might argue, it became ‘social policy’.

However, the changes outlined above – the global trend towards precarity, more casualisation, greater dependence on family and other networks (Parry, 2018: 14) – are said to have turned back the advances made in Euro-American welfare states. Could it be seen as teleological to continue viewing things in the same way? As state-provided

redistribution and security become an ever-remoter prospect, disappearing rapidly into the rear-view mirror of history, should we still think of them (and their opposite, wage work) in the same terms? Or should we instead adopt the perspective of people who have no alternative but to build an independent livelihood out of various fragments, creating what Nguyen (2020) calls ‘portfolios of social protection’ or what Zaloom and James (2023) term ‘patchworks’? The papers in this volume, however, give many examples in which at least some of the constituent ‘patches’ *do* consist of fragments of wage labour, however precarious: they show that life in many cases is only *partly* rather than *wholly* wageless.

A related question is whether financialized capitalism is an overbearing force that determines the life projects of those dependent on it. Cases in this volume demonstrate how workers cannot get by without borrowing money, using loans made increasingly available as a result of the expansion of finance into everyday life. But people use these to their own ends (Webb & Vanqa-Mgijima, this volume): borrowed money can underpin ‘distributive labour’ (Ferguson and Li, 2018: 12; Parry, 2018). Encompassing these kinds of relational realities, Caitlin Zaloom and I argue that ‘anthropological analysis does not presume to know the outcome of financialization; instead, it . . . advances arguments about the social reconfigurations financial encounters produce’ (Zaloom and James, 2023).

Householders thrown up on the peripheries of – but still contributing through their labour to – global capitalist arrangements may thus exercise some control over their social relations and life projects. They do so not despite but because of their involvement with the market, commodification of life and finance. Whether or not to dub this set of arrangements ‘global social policy’ is a contested question, the answer to which is illuminated by this volume’s contributions.

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Author biography

Deborah James is a specialist in the anthropology of South Africa and the United Kingdom. Her work is broadly political and economic in focus. A recent research project produced a special issue of *Ethnos* co-edited with Insa Koch entitled ‘The State of the Welfare State: Advice, Governance and Care in Settings of Austerity’ (2020). Her book *Money from Nothing: Indebtedness and Aspiration in South Africa* (Stanford University Press, 2015) explores the dynamics surrounding South Africa’s national project of financial inclusion – dubbed ‘banking the unbanked’ – which aimed to extend credit to Black South Africans. In a forthcoming book she explores how, in South Africa and the United Kingdom, debt, wages and welfare interlock.