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SIGRUN KAHL

*The Religious Roots of Modern Poverty Policy:
Catholic, Lutheran, and Reformed Protestant
Traditions Compared*

The poor are always with us.
Mathew (26: 11)

1. *Introduction*

THE POSTULATE that the community has a *moral* responsibility to support the poor is a central message of the Bible (1). In this paper, I show that this basic principle underlies modern social assistance, but that it has played out in very different ways in societies according to the relative predominance of Catholic, Lutheran, and Reformed Protestant religious heritages and that these patterns can be seen today in variations in social assistance and welfare-to-work policies in OECD countries. I argue that reference to the social doctrines and poor relief systems of historically significant Christian denominations can help to answer a series of otherwise perplexing cross-national differences in poverty policy.

– A core concern of the welfare state is to ensure that *no* impoverished citizen be left without help. To this end, almost all OECD countries have a national tax-financed last resort safety net (social assistance). Why do Italy, Spain and Greece lack this safety net? Why did France introduce it only 15 years ago?

– Why do Denmark, Sweden, Norway, Finland and Germany just have *one* universal social assistance program, while France, Italy, the United States, the United Kingdom and Ireland have categorical systems with *many* different social assistance programs, ranging from eight benefits in France to an uncountable and highly varied array of localized programs in Italy?

(1) This paper has benefited greatly from comments from Josh Whitford. Comments from Philip Manow, Jan Rehmann and the participants at the April 2004 conference *The*

Western Welfare State and its Religious Roots at the Max Planck Institute for the Study of Societies are also gratefully acknowledged.

- Why is French social assistance as ungenerous as U.S. social assistance (relative to the average productive wage) (2)?
- Why do the United Kingdom and the United States hold individuals responsible for their own poverty and its escape, while the Scandinavian countries and Germany see it as a societal responsibility?
- Why are long-term social assistance recipients conceived of as an “underclass” of dependent welfare “scroungers” in the United States and the United Kingdom, while they are viewed as socially excluded in France and Italy?
- Why is the idea of “doing something in return” for social assistance so strong in the Anglo-Saxon countries and Scandinavia, yet virtually irrelevant in France and Italy?
- Why is Anglo-Saxon welfare-to-work policy exclusively focused on getting the poor into jobs, while Scandinavian policy puts them into work programs and “social activation”, and French integration functions as integration into the benefit system?
- Why are benefit cuts due to unwillingness to work much more frequent in the United States and the United Kingdom than they are in Scandinavia and Germany? And why are benefits never cut due to unwillingness to work in French social assistance? Are the American poor simply less willing to work than the French poor?

1.1 *The Argument*

The argument is based on three claims: 1) poor relief matters for the welfare state; 2) religion matters for poor relief; 3) there are important historical differences between Catholic, Lutheran, and Calvinist approaches to poor relief.

1) Histories of the welfare state are usually written as histories of (emerging) state action to cover the major social risks – through social insurance. Many of these accounts do start with poor relief, but it figures only as the inefficient, outdated antecedent of the welfare state. The replacement of the poor law by modern social insurance legislation is described as a fundamental *break* with the past: “The solution was found in a new institution which broke with the principles of the century old European poor law: social insurance” (Flora 1986, p. XV). They argue that the introduction of invalidity and sickness insurance, old-age insu-

(2) Together with other available benefits (e.g. housing and child benefits, food stamps), social assistance replaces only one-third of the average productive wage (30% in the U.S., 33% in France) (OECD 2002).

rance and unemployment insurance made the palette of income-replacement programs complete, rendering poor relief obsolete (See e.g. Levine 1988; Ritter 1991) (3).

The *continuous* development line from poor relief to social assistance has typically been neglected, even in the literature on the history of poverty (e.g. Geremek 1991). The poor law continued to exist besides social insurance, however, and people kept asking for relief as it was then the benefit of last resort for all those left uncovered by mainstream social insurance. Poor relief was thus the basement of the edifice of the welfare state, in both a historical and a socio-economic sense: social insurance was built on top of the already existing poor relief system; social assistance remains today the basic minimum that societies grant to their members.

2) There is hardly another welfare state benefit where religion has been so determining as in social assistance, nor are there benefits with roots as old as those of social assistance. The traditional welfare state literature is “religion blind”, save for the occasional reference to Catholicism (in particular Christian Democracy) (e.g. Wilensky 1981; Castles 1994) (4). Likewise, the older literature on the history of poverty does not acknowledge religion as an important factor (e.g. Geremek 1991; Sachße 1980; Sachße 1986; Jütte 1994).

There is renewed interest in the impact of religion on the development of the welfare state, but poverty policy and social assistance are nonetheless absent from analyses (e.g. Kaufmann 1988; Manow 2002; Cox 1993; Skocpol 2002; Fix 2002). And recent historical literature directly addresses issues of religion and poor relief but does mostly not go beyond mid-19th century developments (e.g. Gouda 1995; Fehler 1999; Grell 1999, 1997). Studies on social assistance per se do not investigate its historical and religious roots (and thus miss completely the role they have played in determining current patterns) (e.g. Gough 1997). Again, if religion is mentioned, a role is granted only to the Catholic church for Southern European social assistance (“Latin Rim”) (Leibfried 1992).

3) The Reformation launched three different denominational traditions of poor relief: a *Catholic* one in countries like Spain, Italy, and France; a *Lutheran* one in countries like Denmark, Sweden, and Germany; and a *Reformed Protestant* one in countries like the Netherlands,

(3) Because in the United States there is no comprehensive welfare state, the poor law tradition line is more visible, as for instance Katz’s classic account indicates: “In the Shadow of the Poorhouse” (Katz 1996 [1986]).

(4) For a notable exception see Heidenheimer 1983.

England and the United States. These three traditions do not match up with Esping-Andersen's three worlds (Esping-Andersen 1998 [1990]) for the two blind spots in the literature just identified: 1) Poor relief/social assistance is absent from the analysis; and 2) Christian denominations are ignored as a possible source of contemporary differences between welfare states (5).

Once these different social doctrines were institutionalized, Catholic, Lutheran and Reformed Protestant poor relief proved stable over the centuries and came to substantially (but – of course – not exclusively) define countries' approaches towards the poor today. Once chosen, these principles worked their way into societies' fundamental value sets, defining how the poor are perceived and to be treated. Each group of countries institutionalized different principles, pushing early modern poor relief in particular directions and developing and demarcating the "playing fields" upon which policies were designed in the following centuries. And though these principles have changed over time and other causal factors have evolved as the welfare state has developed, they are still deeply embedded today even in the ostensibly secularized countries of northern Europe and in France. Talking about differences in welfare-to-work policies between France and the United Kingdom, a high ranking official in the *Inspection générale des Affaires sociales* explained that poverty is not considered a result of individual failure in France, and ascribed this to the deep embedding in French social policy of Catholic social thought. And when asked why work is so important in Swedish poverty policy, an interviewee in the Public Employment Service smiled and replied with a proverb: "We Swedes have Luther sitting on our shoulders" (6).

This paper starts with the medieval understanding of work and poverty and the historical impact of the Reformation. I then discuss the Catholic, Lutheran, and – concentrating on Calvinism – Reformed Protestant poor relief traditions, looking at notions of salvation and connecting them to variations in the denominations' conceptualizations of work and non-work (begging), describing evolutions in the institutions of poor relief and their functioning principles, and comparing the state-church relationship in each group. Finally, I sketch the implica-

(5) As far as Esping-Andersen's analysis deals with religion, it is restricted to Catholicism (Catholic party strength), which, together with an absolutist legacy, explains the "Conservative-Catholic" welfare states of Germany, France, and Austria, for example (Esping-Andersen 1998 [1990], pp. 53, 118-125, 133f.).

(6) "*Vi svenskar har Luther sittande på våra axlar*". Interviews conducted by the author in Sweden (May 2004) and France (January 2005).

tions of the “religious factor” on the timing, structure and integration objectives of social assistance today.

The empirical discussion concentrates less on the pure examples of each tradition than on those cases that display an exceptional element and that are thus “hard cases” for my argument. Among the Catholic countries, France is more complicated than Spain and Italy because of a strong state. Among the Lutheran countries, Germany is less clear than the Scandinavian countries, due to the influence of a strong Catholic minority. Finally, England’s poor relief tradition is less Reformed Protestant than that of the Netherlands or the United States because of the Anglican *state* church.

II. *The Reformation Revisited*

2.1 *The Middle Ages: Salvation through Almsgiving*

In the Middle Ages, work and poverty were inextricably tied to each other. “Work” was a fatiguing and painful effort that poor and powerless people had to engage in to secure their subsistence. The Latin *laborare* denoted “to strain oneself, to suffer, to be poor, to work”. In 12th century French, *travail* meant the “état d’une personne qui souffre, qui est tourmentée; activité pénible” (7). A French word for both poverty and work is *besoin* and its female form *besogne* (*Petit Robert; Dictionnaire de l’Académie française* 1877). In German (*arabeit, arebeit*) work meant pain, toil, effort, punishment, and affliction (*Ethymologisches Wörterbuch der deutschen Sprache*). The English labour was the “exertion of the faculties of the body or mind, especially when painful or compulsory; bodily or mental toil” (*Oxford English Dictionary*).

Poverty was associated with powerlessness, manual labor, and social problems but all this was outweighed by the glorification of the poor as an image of Christ. The sacralization of poverty caused a huge share of “voluntary poverty” – orders and individuals who gave up all their possessions to be closer to Christ. Mediation between the rich and the poor through the church was fundamental to medieval Christianity. The rich were to donate to the church and give alms in person. Between a

(7) *Travail*: “The state of a person who suffers, is in pain, toiled away, tormented; a fatiguing effort” (author’s translation from the *Petit Robert*).

third and a quarter of church income went to the poor, who had to accept their destitute situation (Geremek 1991, p. 52). The *pauper* (“powerless”, “poor”, “a person who has to work to survive”) was the necessary complement to the *potens* (“powerful”, “rich”, “a person who does not have to work”) (Bosl 1964).

Prayers from the poor were the most effective way of ensuring entrance to heaven in a world oriented towards the afterlife. *Pauper* and *potens* thus engaged in a reciprocal – and for both sides essential – commitment: the *potens* passed out the alms and, in return, the *pauper* prayed for the donor’s soul. It was common to donate large sums to be *equaliter dividendos* among the beggars at each anniversary of the donor’s death, to ensure that the poor prayed for salvation on this day. For instance, Hermann Zierenberg of Lueneburg wrote in his 1423 testament: “In addition, I donate 16 mark of eternal annuity every year, in order to buy canvas [for the poor] (8)”. Note that the annuity is eternal – he wanted long-term salvation.

Popular feeling had lent a half-mystical glamour, both to poverty and to the compassion by which poverty was relieved, for poor men were God’s friends. At best, the poor were thought to represent our Lord in a peculiarly intimate way... At worst, men reflected that the prayers of the poor availed much, and that the sinner had been saved from hell by throwing a loaf of bread to a beggar, even though a curse went with it. The alms bestowed today would be repaid a thousand-fold, when the soul took its dreadful journey amid rending briars and scourching flames. (Tawney 1990 [1922], p. 259)

Societal attitudes towards giving to the *pauperibus ex peregrino venientibus* – to the wandering beggars – were ambiguous. Beyond fears that beggars might spread disease and difficulties in verifying who was truly poor, people wanted assurances that the poor would do their part of the gift exchange by praying. To deal with this, municipal edicts on begging often required a “beggars’ exam”: beggars had to be able to recite the Lord’s Prayer, the Ave Maria, the Apostle’s Creed and the Ten Commandments (9). As the medieval edicts on begging show, municipalities had started to regulate begging, well before the Reformation not only as a reaction to the social problem, but also out of the Christian duty to care for the poor.

(8) Author’s translation from Reinhard 1996, Nr. 149. For more examples see Mollat 1984.

(9) See for instance Waldau 1789; Roger 1932.

2.2 *The Reformation*

The Reformation has been (and is) the subject of considerable historical debate. The late 19th century witnessed heated confessional discussions about the role of the Reformation for poor relief. Catholic historians stressed the Reformation's detrimental impact on poor relief (e.g. Ratzinger 1868; Ehrle 1881, 1888), whereas Protestant historians (e.g. Uhlhorn 1884; Winkelmann 1913/1914, 1914/1915) argued the opposite. Likewise, when Weber argued that there was a causal connection between the Calvinist Diaspora and the spread of modern industrial capitalism, critics such as Sombart and Brentano represented (in a fashion) the Catholic perspective: they claimed that capitalism was not a phenomenon of Modern Times, interpreted medieval attitudes as an anticipation of the ascetic element of the puritan ethic, and brought up ever new historical groups that they argued were precursors of the modern capitalist spirit long before the Reformation (Sombart 1988 [1913]; Brentano 1916).

This criticism was formative for the historiography of poverty. As late as the 1960s the dominant view was that the Reformation was neither good nor bad for poor relief – it was simply not relevant. Rejecting the Weberian Protestantism argument, many historians nonetheless took up and applied Weber's analytical categories. They argued that both Protestant and Catholic territories underwent the same developments of rationalization, bureaucratization and professionalisation. The context for poor relief reform was urban crisis and increasing poverty. The motivation for poor relief reform was born of humanism rather than Protestantism and the work ethic was not "Protestant" but a solely bourgeois phenomenon and part of an emerging capitalist set of attitudes (Scherpner 1933, 1984 [1962]; Tierney 1958; Davis 1968; Gutton 1971, 1974; Pullan 1976; Geremek 1991; Sachße 1980; Fischer 1982; Jütte 1994).

Today, the Reformation is increasingly understood to be a decisive watershed that explains important differences across countries. This is not to say that there were no similarities between Catholic and Protestant approaches to poverty and that part of these changes did not originate before the Reformation (as is well known, Luther himself stood in the tradition of humanist social thought). But differences between pre- and post-Reformation poverty policy and between Protestant and Catholic territories do far outweigh the commonalities. One of the most immediate signs of the diverging developments was the change in the municipal edicts on begging: in Lutheran cities, the councils transformed the *reactive* medieval begging edicts that had negatively regulated begging into *active* poor relief edicts that formulated a positive respon-

sibility of the emerging secular authorities to care for the poor (10). Poor relief in the north and south of Europe developed differently during the Reformation and the confessional age. In short, northern Protestant countries came to be characterized by schemes predominantly initiated by the local and central governments, whereas the southern Catholic parts of Europe saw a re-enforcement of traditional poor relief, the creation of Catholic institutions for this purpose, and a new lay of clerical orders dedicated to the poor and sick. These two different development lines continued into the 19th century (see the contributions in Grell 1997, 1999, 2002).

This general juxtaposition of a Protestant and a Catholic development line is common in the history of poverty, both among those who deny and among those who stress its significance. However, as Gorski has argued about early modern state building, to similarly juxtapose oversimplifies and leaves unexplained important differences *within* Protestantism; most importantly, it fails to account for the different developments in the predominantly Lutheran and Calvinist countries (Gorski 2003, p. 136).

This difference can be summed up in a single word: discipline. (...) [P]olities dominated by Calvinists and other ascetic Protestants were more orderly, more regulated, and more fully rationalized than politics dominated by orthodox Lutheranism or reformed Catholicism. (Gorski 2003, p. 155)

Manow has shown the same to be true for the timing of the introduction of social insurance (Manow 2002, 2004; see also Heidenheimer 1983). Distinguishing between Catholicism, Lutheranism, and Reformed Protestantism allows a more systematic understanding of variation between poor relief traditions than does a comparison between Catholic and Protestant traditions alone.

III. *Catholic, Lutheran and Reformed Protestant Principles of Poor Relief and their Institutional Traditions*

3.1 *Catholicism*

Salvation by Good Works for the Poor

In early modern times, poverty was public. Beggars were everywhere: they knocked on house doors; they occupied space in the streets; they

(10) E.g. for Nuremberg see the edicts reproduced in Baader 1861; Rüger 1932; for other pioneer cities of Lutheran poor relief see the edicts in Winkelmann 1913/1914. For Protestant cities with no direct Lutheran influence see Battenberg 1991.

lingered in front of cloister gates; they begged in churches during services (and they often even lived in the churches). They were loud and demanding, singing beggar's songs, playing instruments, showing their mutilations and asking every passer-by for the alms. They powerfully and eloquently cursed and thus embarrassed those who did not donate. Attempts to do something about poverty thus unsurprisingly began with positions on begging.

In the course of the Counter-Reformation, Christian benevolence became an important part of Catholic renewal. The Council of Trent confirmed the traditional principle of poor relief – *caritas* – and rejected the repression of begging, while it acknowledged that begging needed to be regulated. The Catholic church taught that people were justified by faith in Christ and by a life of good works. Almsgiving remained an individual act and begging was not forbidden (Battenberg 1991, p. 68f; Fairchilds 1976, p. 27; Pullan 1988, p. 200). Not only Catholic policy-makers and Church officials, but also the population opposed secularizing poor relief. The fear was that a secular system would erase the divine benevolence of the giver, as detailed in a 1791 letter to the Bavarian government from a local official:

Many are of the opinion that alms giving is not meritorious, if it is not handed out personally. From this nearly general rule [derives] that only in this manner will God's blessing remain on the house. (Quoted from Stolberg 2002, p. 118)

When secular authorities did try to regulate begging, their declarations and edicts had two important commonalities with legislation in Protestant countries: forcing the able-bodied poor to work and deporting vagrants. Yet, whereas secular authorities in Protestant countries actively enforced such legislation, in Catholic countries institutions of poor relief were not secularized and there was thus no authority to enforce the legislation. In addition, traditional attitudes among the population and civil servants prevented Protestant ideas like the work ethic from entering the institutions of charity. Moreover, Catholic country legislation usually did not go as far as in Protestant societies: for instance, begging was often only forbidden for wandering beggars but not for the resident poor. Finally, much of the legislation regulating poverty was not systematic but situational, reacting to a strong increase in the number of beggars or to an epidemic. A classic example is the "Great Confinement", an event in 1656 that confined over one percent of Paris' population.

The Hospital System

Though *caritas* implied that the rich had a duty to do good works, it did not engender a right of the poor to claim relief. Catholic poor relief continued the relatively indiscriminating passing out of alms, stressing that “giving to the poor from one’s affluence is a moral duty, which, however, cannot be called for by the poor as a right” (author’s translation of Fösser 1889, p. 567). The hospital was the major institutionalization of that principle, and it remained in the hands of the church, monastic orders, lay confraternities, and pious foundations. Through the personal giving of alms, it guaranteed that the alms reached the recipient, ensuring the donors’ salvation. The hospital also allowed for the church and local authorities to carry out social monitoring and to confine and control the poor; namely, the hospital enabled authorities to separate men from women, to provide religious instruction, and to educate them. In the 18th and 19th centuries, the general hospital was divided into various hospitals for the different groups of poor (e.g. the elderly, orphans, single women, able-bodied men, sick and disabled people and – importantly – criminals).

In Spain and Italy, the traditional institutions of charity remained largely unchanged after the Reformation (Pullan 1988; Geremek 1991). Protestant ideas of poor relief informed some proposals on the re-organization of poor relief, but never made it into legislation. France differed from its Catholic neighbors in making *some* attempt to forbid begging, make the poor work or even establish a poor relief system, like the *Aumône générale* in Lyon (Davis 1968). However, these efforts were never consistent. There was no coordinated supervisory system but only a hodgepodge of local institutions. The two most important of these institutions were the *Hôpitaux généraux* (11), and the *Dépôts de mendicité* – royal workhouses that were introduced in the 18th century to force able-bodied beggars to work. These differed, however, from Protestant (and especially Calvinist) countries, where the workhouses sought to punish, correct, and economically exploit the poor. In France, these objectives competed with – and lost against – traditional charity. The *Hôpitaux* were never supposed to pay off economically, nor were they just places of punishment, but also of support, shelter and medical care.

When secular authorities attempted to force the poor to work, they met plain resistance. In France, protest at times took violent forms. In 1792, Parisians stormed not only the prisons but also the *Hôpital général*.

(11) There were about 2,000 hospitals in France in the 18th century (Ramsey 2002, p. 292). At the end of the 17th century, Parisian hospitals alone accommodated 10,000 people (Geremek 1991, p. 266).

Among other motives, such popular reservation and unrests were also induced by the ongoing traditional feeling of compassion and the sacralization of poverty. Elsewhere there were similar reactions to proposals for workhouses (12) – for instance in 18th century Bavaria:

Indeed, the Catholic tradition in Bavaria probably found its most forceful expression not in the state measures but in the widespread misgivings and protests they caused, and their failure to eradicate beggary. (Stolberg 2002, p. 127)

Caritas, Subsidiarity and the Lack of Secular Poor Relief

In the tradition of Catholic *Caritas* and according to what came to be called the subsidiarity principle in the 20th century, helping the poor was a responsibility of the local Christian community and should arise from compassion rather than legal force through the state. Relatives, friends, employers and the church all felt individually responsible for the poor. Typical examples of Catholic poor relief are Spain and Italy, where relief stayed localized and the churches remained the most important provider of assistance. Until the 20th century, there was no national regulation on minimum benefits.

The French case is more secularized and centralized because many cities introduced centralized and partially secular systems of poor relief in early modern times, and because there was violent church-state conflict during and after the Revolution. Despite strong secularization trends, state poor relief was until the 19th century predominantly executed by the church. The *Comité de mendicité* of the French Constituent Assembly envisioned a radical vision of *la bienfaisance nationale* where the national state assumed responsibility for the poor. The national convention wanted a national poor relief system and declared the principle of obligatory public assistance: “*l’action en direction des plus démunis relève d’un devoir de la nation tout entière*” (quoted from Paugam 1999, p. 27; see also Paugam 1993, pp. 85-93). Between 1792 and 1794, the national convention intensified its commitment to assistance on the national level. The right to subsistence was written into the declaration of rights of the Jacobin Constitution, although it also cracked down on begging and almsgiving with exceptional ferocity. However, the ideals of the Revolution formed only a brief interlude, with traditional principles

(12) There are numerous examples. In Italy, for instance, a papal edict of 1561 prohibited begging, required the able-bodied poor to perform useful work, and demanded the expulsion of the non-resident poor. This law had no effect (Geremek 1991, p. 253). Similarly, Dinges shows how in the French city of

Bordeaux poor relief reform was completely in vain (Dinges 1988). See also Gutton 1971, 1974; Schwartz 1988. For Bavaria, see Stolberg 2002; Schepers 2000. For a good summary of the historical case studies see Gorski 2003, pp. 107-133.

and providers returning quickly to the fore, resulting in the vision of *la bienfaisance publique* (Ramsey 2002, p. 288). The state nationalized church property but did not replace the hospitals and continued to pay the clergy to do the work. Thus, the institutions of poor relief changed their owner but were not themselves changed. Following the fall of Robespierre, the national convention steered to a less statist model. In 1795, the unsold property of the hospitals was returned to the church. Poor relief became a municipal matter that was entrusted to renowned citizens.

“*La bienfaisance publique*” enjoyed support because most liberals and Catholic conservatives could agree on several crucial points: assistance was a social necessity, but there should be no state guarantee, though the state could play a useful role by coordinating various governmental and voluntary efforts. Assistance was a moral obligation for the donor, but not a right enjoyed by the individual recipients (Ramsey 2002, p. 295). In short, France retained the core principles of Catholic social thought. In revolutionary France, charity turned into a duty of the good Citizen and the good Christian. By the late 19th century, the Enlightenment terms *bienfaisance* and *philantrophie* enjoyed less currency than Christian *charité* (Ramsey 2002, p. 302; Kesselman 2002).

In the course of the religious revival at the beginning of the 19th century, the old system was strengthened. No less than 300 orders were created in France between 1810 and the Second Empire, and during the 1850s no fewer than 100,000 women worked in such orders (Faure 2002, p. 312). France was thus characterized by the public regulation and religious implementation of assistance (Gouda 1995), a “surprisingly limited direct involvement by the state in poor relief”, and an “explosive growth of charity and mutualism” (Ramsey 2002, p. 303).

3.2 *Lutheranism*

Sola Fide and the Condemnation of Begging

With the Reformation and Luther’s translation of the Bible, two things happened to the concept of work: first, Luther raised the profile of work immensely and work became an intrinsically positive activity that was pleasing to God; second, work no longer equalled poverty but was seen instead as a way overcoming poverty, which then became associated with non-work and laziness. Salvation did not depend on the kind of work a person was doing; thus, the poor peasant’s work was

worth as much as that of the wealthy artisan. The pursuit of material gain beyond individual needs, however, was reprehensible.

The effect of the Reformation as such was only that, as compared with the Catholic attitude, the moral emphasis on and the religious sanction of, organized worldly labour in a calling was mightily increased. The way in which the concept of the calling, which expressed this change, should develop further depended upon the religious evolution which now took place in the different Protestant Churches. (Weber 1958 [1904-1905], p. 83)

In Lutheran doctrine, both the beggar and the donor lost their former status. Excoriating the sale of indulgences by the Catholic church, Luther postulated that Christian truth could be found only in Scripture (*sola scriptura*), and that only by faith could man be justified (*sola fide*). God's *gratia amissibilis* could always be regained by true faith. All human works were sins, as long as the person performing them was a sinner. He thus strongly rejected the idea that generous donations could prevent sinners from eternal damnation and agony in fire and brimstone, or that the poor would be justified by living in poverty. Begging was "blackmail". He rejected individual almsgiving and denounced the able-bodied beggars. In his foreword to the 1523 German edition of the *Liber Vagatorum*, a famous collection of fraudulent begging techniques, he demanded that the "undeserving" poor – the cheaters, idlers and vagrants – be excluded from the alms.

The differences between Catholic and Lutheran approaches were reflected in the heated controversies theologians fought from the 16th century on – about Catholic almsgiving, how to deal with beggars, the role of the Reformation, and whose system was more in line with the Gospel (Geremek 1991, pp. 91, 147; Davis 1968, p. 217ff). These debates were revived again and again in the centuries following the Reformation. In 19th century Germany, the argument even entered the encyclopedias and can be traced in the different editions of major Lutheran and Catholic encyclopedias. Lutheran historians criticized the Catholic church for not countering "undeserving" poverty, most of all the "strong beggars". They argued that the Catholic church failed to develop distribution criteria, leaving troops of wandering beggars ("Bettlerscharen") to grow into a "beggars plague" ("Bettlerplage"). Uhlhorn, one of the leading Protestant historians of his time, wrote in 1859:

The medieval Church preached that begging out work shyness was a sin, but it also gave begging its halo; on the one hand, the Church provoked rich charity by promoting almsgiving as good works, but on the other hand, it disregarded the proper distribution of the alms because the primary intent behind almsgiving was to gain God's grace, rather than to relieve poverty. (Author's translation of Uhlhorn 1859, p. 828)

Protestant poor relief then was “self-defense” by the police against the dangerous nuisance of begging that church poor relief had created but could no longer manage (Uhlhorn 1859, p. 919). Building on that critique, Lutheran social reformers developed their version of poverty policy: in the 1859 edition of the Protestant *Handwörterbuch der Staatswissenschaften* Aschrott wrote that the state had to protect the community from the “undeserving” poor, but the state also had to ensure all the help possible for the “truly needy”. The Catholic *Staatslexikon* replied:

The “commonplace of the adversary” [the Protestants] that “medieval poor relief existed because of the [effects of] good works rather than because of helping the poor is rather meaningless. If it proves anything, it is that the feelings of voluntarily giving medieval Catholics were different from the feelings of today’s Protestants who must be forced to pay their taxes”. (Author’s translation of Fösser 1889, p. 490)

From Individual Almsgiving to Centralized Outdoor Relief

Luther demanded that begging be forbidden; nonetheless, he simultaneously believed that secular and church authorities were responsible for establishing a system of poor relief. As he first outlined in the Order for a Common Purse (*Beutelordnung*) for Wittenberg in 1520/21, the poor were to be registered and to be supported out of a common chest that was financed through weekly collections. This system reduced the role of the hospitals to attending to the sick and the weak. Poor relief rigorously enforced the distinction between the “deserving” and the “undeserving” and relief tended to be restricted to the residential, authentic and morally upright poor, and the able-bodied should work. In Luther’s famous words, a basic principle of a “healthy” system of poor relief is: “*Es fügt sich nit, daß Einer auf des Andern Arbeit müssig gehe*” – “No one should live idle on the work of others”. In this vein, the Nuremberg alms edict of 1522 mandated that able bodied beggars (*die “unwürdigen”* – the unworthy) not be supported so that the deserving poor (*die “armen dürfftigen personen”*) could get all they needed. Applying for relief became a bureaucratic process that required a formal examination of need and eligibility. Whoever fulfilled the criteria was to get relief according to their need, number of children, individual conduct and budget keeping (“*gemäß irer dürfftigkeit, kinder, wesens and haushaltens*”) (quoted from Rüger 1932).

As a complement to outdoor relief, Lutheran cities took over the workhouse idea from Calvinist cities. The slogan “*Labore nutrior, labore plector*” (“with labor I feed myself, with labor I am punished”), engraved above the door of the Hamburg workhouse, illustrates the twofold

objective of the workhouse. It was to deter the able-bodied poor from claiming relief, whom it demonstratively reminded of their duty to support themselves. At the same time, the workhouse was a punishment and a correction institution for those who were socially deviant. According to the Danish 1891 poor law, for instance, the poor could be required to work and to stay in the workhouse in the following cases: not bringing their children up responsibly, neglecting their duties, being drunk, being incorrigible, and refusing to work (Bonderup 2002).

The State as Uncontested Provider

The Lutheran poor relief system was secularized and centralized, but not in opposition to the church. Rather, Lutheran cities built the new secularized system *with* the existing religious institutions and in cooperation with church representatives. This cooperation can for instance be seen at the introduction of the 1522 Nuremberg Poor Law: the law replaced the alms and introduced a municipal common chest for the poor, but it was read from the pulpit, and the chest was set up inside the church. In Lutheran countries, responsibility of the state for poor relief was unquestioned and the secularization of social welfare was a smooth process. The common chest developed into poor taxes, to be collected and delivered by lay administrators. In 19th century Copenhagen, for instance, one poor relief officer was responsible for no more than 15 families, so he could keep an eye on them and encourage them to industriousness, order, domesticity and cleanliness (Bonderup 2002, p. 177). By the late 16th century, poor relief had moved from the municipal to the territorial level all over Germany. The 1794 *Allgemeines Landrecht* made poor relief a general responsibility of the Prussian state. In this legislation, the state commissioned itself...

...to provide for the nutrition and feeding of those citizens who are unable to provide for themselves, and who are unable to receive provisions from others who are bound to provide care in accordance with other special laws. (Quoted from Dross 2002, p. 72)

In the 1808 *Städteordnung*, Prussian municipalities were compelled to establish communal authorities on a uniform basis. As a result, relief efforts increased dramatically. For instance, in 1750, one in 82 Berlin residents received poor relief (=1,384 recipients), in 1801 the ratio was 1:14 (=12,254 recipients) (Dross 2002, p. 74).

Lutheran countries were the pioneers of welfare legislation, starting in the late 19th century with the introduction of social insurance in Germany, which was motivated by Bismarck's explicitly Lutheran

notion of state activity. By the beginning of the 19th century, the Danish government saw itself as ultimately responsible for the poor, and the duty of the state to provide relief was even written into the 1834 constitution. Catholics vehemently criticized this approach and perceived Protestant systems to be more individualistic and irresponsible towards the poor, and thus in need of a “standardization of the duty to provide” through the state (Fösser 1889, p. 467). As the Catholic historian Fösser wrote in 1889:

The State may well introduce compulsory institutions, but with regard to the duty of benevolence, it is less the political and more the religious aspect that matters. The Church preaches in a divine mission the highest divine poor law – the postulate of charity – through its servants with words and good examples. (Author’s translation of Fösser 1889, p. 471)

3.3 *Calvinism and Reformed Protestantism*

Salvation by Hard Work

Calvin took Luther’s interpretation of work much further because he made work an absolute duty; a spiritual end in itself and the *best* way to please the Lord. Calvin also fundamentally changed the requirements on *how* people should work. Whereas in Lutheranism, the sinner could always regain God’s mercy if he was humble and believing, in Calvinism sinning was irreversible. Only systematic and constant self-control provided security of the state of grace, and the most reliable means to feel that security became to restlessly work in a disciplined and rational manner (Weber 1958 [1904/05], pp. 70-88). The beggar’s status was reversed and the laborer assumed the position closest to God. “In the things of this life, the labourer is most like to God”, declared Calvin (quoted from Tawney 1990 [1922], p. 123). Accordingly, those who did not work were damned, be they poor or rich.

As Weber pointed out, there is no word like *Beruf*/calling/vocation in the predominantly Catholic peoples (Weber 1958 [1904/05], p. 79), where the medieval concept more or less persisted. In Catholic societies, work remained a means to ensure subsistence and the “*traditionalistischer Schlendrian*” (traditional inefficiency and casualness) continued to characterize the way people worked (Weber 1996 [1904/05], p. 22f). As Tawney wrote in his foreword to the 1958 edition of the Protestant Ethic, “by the middle of the seventeenth century the contrast between the social conservatism of Catholic Europe and the strenuous enterprise of Calvinist communities had become a commonplace” (Tawney 1958, p. 6).

Calvinism developed two different, and partially contradicting, ideas of poverty, which both stigmatized the poor: one is the doctrine of predestination in Calvin's writings; the other is the ethos of work and individual responsibility. Predestination states that God's "unconditional election" creates every human being as either damned or saved prior to birth. The condemnation of the poor did not necessarily follow from this, and it was not explicit in Calvin's writings (13). Calvinists, however, were searching for signs of damnation or salvation. As Borkenau shows, the principle of understanding a morally rigorous worldly life and economic success as signs of election marks the last step in the emergence of a Calvinist moral in 17th century England, Holland and United States (Borkenau 1980 [1934], pp. 154-161).

In practice this means that God helps those who help themselves. Thus the Calvinist, as it is sometimes put, himself creates his own salvation, or, as would be more correct, the conviction of it. But this creation cannot, as in Catholicism, consist in a gradual accumulation of individual good works to one's credit, but rather in a systematic self-control which at every moment stands before the inexorable alternative, chosen or damned. (Weber 1958 [1904/05], p. 115)

The most certain mark of election was proving one's faith in a worldly activity, and success in a worldly occupation and wealth became an absolute sign that one was saved by God from the start, while poverty became the certain sign of damnation. The Calvinist creation of the Protestant work ethos and the strict and systematic requirements about what constitutes a life that increases the glory of God (e.g. personal responsibility, individualism, discipline, and asceticism) made poverty appear to be the punishment for laziness and sinful behavior. Good works were a necessary but not a sufficient sign of being chosen. Unlike the Catholic, the Calvinist could not buy his salvation by accumulating good works because only systematic self-control and restless work ensured salvation. "There was no place for the very Catholic cycle of sin, repentance, atonement, release, followed by renewed sin" (Weber 1958 [1904-1905], p. 117).

Both predestination and its marks – the ethics of worldly life – have in common the fact that the poor are sinners and the rich are not. Predestination implied that the community has no positive responsibility *for* the poor; Calvinist moralism implicated that the poor needed to be punished and corrected. Beggars were to be whipped and forced to work. As Sir Henry Pollexfen wrote in 1697: "Sturdy beggars should... be

(13) Calvin elaborated the predestination doctrine within the context of religious prosecution all over Europe, arguing that it was not current history that decided about fate but only

God's sovereign choice. Referring to Jesus' advocacy for the poor, Calvin actually led campaigns against the forcing up of prices in Geneva.

seized and made slaves to the public for a certain term of years” (quoted from Tawney 1990 [1922], p. 267).

Work Ethos and Workhouse System

The workhouse is the invention of Reformed Protestant social reformers. Often it was a redefinition of former hospitals, like the first workhouse, the famous *Bridewell* in London (1555). The first Continental workhouse was the Amsterdam *Tuchthuis* (1595), which was a model to Northern German cities that followed suit in the early 17th century. The first German workhouse was in Bremen (1609). Catholic workhouses were last and very few, and met considerable opposition so that many of them were never realized or had to be shut down. The intent to bring the poor to work existed everywhere, but only in Reformed Protestant poor relief was the workhouse – and the principles it stood for – programmatic. This is not just reflected in the sequencing in the introduction of workhouses, but also in the number of workhouses. In England there were 200 workhouses in the 18th century. In comparison, there were 63 workhouses in the German Lutheran territories – even though the area and the population were considerably larger than England (14). In the German Catholic territories there were only 5 workhouses by the 18th century (Köln, Münster, Paderborn, Würzburg, Passau) (Geremek 1991, p. 260; also Ayaß 1992, pp. 16-21, 25-31; Gorski 2003, p. 135).

The earliest arrivals of Dutch and English immigrants had already brought the workhouse idea to the United States, and from then on the history of poor relief in the United States largely followed the English and Dutch precedents. The Dutch established the first workhouses in the 1650s in present New York City and in Albany, to be followed by the English colonies (Boston 1662; Huey 2001, p. 140). London’s *Bridewell* inspired the founding of a *Bridewell* in New York City in 1776 (Baugher 2001).

In the Catholic countries Lutheran outdoor relief was rejected because it made the giver-receiver relationship anonymous and did not

(14) By 1801, 8.9 million people lived in England and Wales, as compared to 22 million in Germany (1816) (Mitchell 1992, p.4). By 1816, 3.7 million Germans lived in Catholic Bavaria, and 15 million lived in the Lutheran territories of Prussia, Baden, Württemberg, Thuringia, Saxony and Schleswig-Holstein (<http://www.tacitus.nu/historical-atlas/index.html>). I could not find the

population data for the other Catholic and Lutheran parts of Germany for that time. I did find more detailed population data for Germany in the mid-19th century: roughly 30 million people lived in the Lutheran parts of Germany by 1864 (Mitchell 1992, p. 52) as compared to 20 million in England and Wales by 1861 (Mitchell 1992, p.8).

guarantee that the needy actually received the alms. Reformed Protestant reasoning also opposed it, but for a very different reason: it pauperized individuals. Outdoor relief provided no incentive to the poor to develop work habits and improve themselves, and it deprived authorities of any possibility to control their behavior and circumstances. In England, the 1723 Work House Test Act and 1834 Poor Law Report allowed support for “paupers” *only* in the workhouse. Usually, the English workhouses produced for the textile industry (e.g. spinning) (Driver 1993).

Classification of the poor according to their ability and willingness to work and to their moral conduct was central to Reformed Protestant poor relief. As of 1536, English parishes were authorized to collect money to support the impotent poor. The 1601 Statute identified three main groups: the impotent poor (e.g. the aged, sick and lunatic) who were to be institutionalized in poorhouses; the able bodied who were to be put into the workhouse; and the able-bodied who were unwilling to work who were to be punished in the workhouses.

Reality, however, differed somewhat from statute, both in England and the United States, and outdoor relief was always important for those who could not work, because it was so much cheaper to administer for the parishes than the poorhouse and workhouse. Reality also differed in that it was impossible to accurately separate the able-bodied from the impotent, and the willing from the unwilling (Katz 1996 [1986], p. 30ff). If able-bodied people received outdoor relief, it followed from the logic of the workhouse that recipients had to work in return, as enshrined already in the 1576 English Poor Relief Act. Municipal outdoor relief was never a stable institution, and was heavily attacked and sometimes abolished (and then perhaps reintroduced). The workhouse, by contrast, was considered the proper institution to care for the able-bodied poor, whereas outdoor relief was an acknowledged way to support the “deserving” poor (Katz 1996 [1986], pp. 3-59; Driver 1993).

Calvinist doctrine postulates the glorification of God not by prayer only, but by striving and laboring – *labore est orare*. Only in the workhouse could the Calvinist duty of industry be enforced and the danger of relaxing the incentive to work be avoided. Relief had to be so low and conditions in the workhouse so hard that any work was more desirable and only the most destitute would ask for relief (*less eligibility principle*). Public assistance was to be restricted to the absolute minimum to keep wages low, a principle which Young’s famous 1771 quotation summarized as follows: “Every one but an idiot knows that the

lower classes must be kept poor, or they will never be industrious” (quoted from: Englander 1998, p. 1). In addition, the workhouse ensured that the poor gave something back for the relief they got. There are numerous pamphlets of 17th and 18th century writers that advance schemes for further developing the workhouses. For instance, Hartlib wrote in 1650:

The law of God saith, “he that will not work, let him not eat”. This would be a sore scourge and smart whip for idle persons if... none should be suffered to eat till they had wrought for it. (Quoted from Tawney 1990 [1922], p. 262)

The Reformed Protestant approach created two classes of work: work as a calling for the elected; and work as punishment and toil for the poor. Whereas Luther had said that *any* work is of equal value for God, Reformed Protestantism qualified that *only* rational work and a striving for profits was pleasing to God. Whereas in Lutheranism the state of grace was only determined by faith, in Calvinism it was predetermined and could be recognized at wealth (elected) or poverty (damned). Reformed Protestantism required profitable and rational work from the *electi* and considered work in the workhouse to be the proper punishment for the poor.

Rejection of State Involvement

According to Calvin, poor relief should be part of the church’s ministry. Church and private charities retained a key role in the administration of poor relief. Private charity was part of proving and displaying election. In this sense, Calvinism kept the traditional ostentation of public giving. The anti-statist position of reformed Protestantism (even the Anglican church) resembled Catholicism:

Both view welfare as the responsibility of a group to protect its disadvantaged members. Whether the defining principle is sovereignty in one’s own circles or subsidiarity, social welfare is viewed as a private, church concern rather than a state concern. (Cox 1993, p. 66)

In the Netherlands only a few city councils controlled relief administration. Poor relief was in the hands of various private and church institutions. England developed a more secularized and centralized system with national poor relief legislation and local poor rates. But in England the system also remained localized, and church and private charities had considerable influence over the collection and distribution of funds. Moreover, poor relief legislation by the state tended to negatively regulate poor relief (e.g. by prohibiting outdoor relief and restricting poor relief to the poorhouses and the workhouses) and to

provide a framework for local action (e.g. blueprints for the classification and institutionalization of the poor). As a result, the Poor Law was “a tool of social policy of infinite variety and unlimited versatility” (Fraser 1976, p. 32) that gave space to experiments like the famous Speenhamland system of 1795 in Berkshire. Most importantly, the poor laws did not positively formulate an ultimate state responsibility for the poor. Private Christian charity and voluntary organizations remained central actors. By the end of the 19th century, at least as much money was passed through these charities as through poor relief (Lewis 1999, p. 13). In the United States, the (national) state played a small role, stepping in only rarely and with strictly limited powers (Levine 1988, p. 265). When American churches became independent from England in the 19th century, the American constitution assured the separation between church and state, resulting in private charities becoming more important in the United States.

iv. *Timing and Principles of Social Assistance*

At some point in the 20th century, most welfare states replaced poor relief with a “modern” social assistance program, distinguished by five formal features: 1) social assistance serves as a last resort benefit for all those who have no other sources of income (through own income and public or private transfers) and assets; 2) social assistance is a legal entitlement to every citizen in need; 3) social assistance is conditional on a standardized means test and benefit rates are legally fixed; 4) benefit calculation is made according to a measurement of costs of living and benefits should guarantee a subsistence minimum; and 5) social assistance is provided as long as the need situation continues and is not time limited.

There is a strong correlation between dominant denomination and the timing of major welfare state benefits. As Manow (Manow 2004, 2002) has shown, variations within Protestantism account for the different timing of social insurance programs in the Protestant countries. “[T]he strongly anti-étatist position of the protestant free churches and other reformed currents of Protestantism (Dissenters, Calvinists, Baptists etc.)” accounts for the delayed welfare state in United Kingdom, the United States, Switzerland, and the Netherlands. In the Lutheran countries “not much stood in the way of the government taking over

responsibility for the welfare of its citizens”, which fostered an early welfare state. In the Catholic countries in Southern Europe the church claimed “supremacy over the nation state”, which contributed to the late introduction of welfare state programs (Manow 2004, p. 6f).

As argued in the introduction, social assistance and social insurance development lines are different, due to the distinct “ancient” logic of poor relief/social assistance, which continued to complement modern social protection as a last resort safety net. Putting the social assistance and the social insurance lines together gives the following picture (Table 1): when we look at the introduction of the major welfare state programs, the Lutheran welfare states started early, and the Catholic and Reformed Protestant welfare states were late. The picture is different in the social assistance perspective: the Reformed Protestant states were early, the Lutheran states introduced social assistance late, while the Catholic states launched it very late or not at all. As to benefit structure and generosity, Catholic and Reformed Protestant social assistance is fragmented and ungenerous, with different benefits for different groups of the poor. Lutheran social assistance is unitary and generous, with one uniform social assistance program.

	Catholic	Lutheran	Calvinist/ Reformed Protestant
Timing of major welfare state benefits (pensions, invalidity, sickness, unemployment)	Late	Early Social insurance welfare states	Late Public assistance welfare states
Timing of social assistance	Very Late (e.g. France 1989, Ireland 1977. Italy, Spain, Greece, Portugal: no national system until today)	Late (e.g. Sweden 1980, Denmark 1976, Germany 1961)	Early (U.S. 1935, UK 1948, Australia 1944)
Structure of the public assistance system	Fragmented (many SA programs, covering different populations & risks)	Universal, unitary (one social assistance program)	Fragmented (many SA programs, covering different populations & risks)
Generosity of social assistance benefits	Ungenerous	Generous	Ungenerous

TABLE 1

Timing, structure and generosity of social assistance

4.1 *Societies with a Catholic Heritage*

Because of the uncontested supremacy role of the church as provider in the Catholic countries, the welfare state started late and left the neediest uncovered. This remains a core domain of local church charity, with Italy, Spain and Greece fully without social assistance even today. In these countries, the welfare state remained “rudimentary”, without a provider of last resort. When public assistance exists, it is very ungenerous. The poor have to rely on private almsgiving (through the Church or begging), religious welfare associations like *Caritas*, their families, the informal economy and – if existent – discretionary municipal (Italy, Portugal) or regional (Spain) poor relief. In Italy, many municipalities have some kind of social assistance, but it is extremely low, highly discretionary and covers only a very small number of the poor, with the unmarried and childless virtually never receiving benefits.

The French model is secularized but with the important modification that the church is incorporated into the state and has been very influential in the arena of poverty policy. Up to 1990, the situation in France largely looked like the situation in Italy today. There was no national benefit, and there existed only local relief, but not everywhere and not for everybody in need (Commission Nationale d’Evaluation du Revenu Minimum d’Insertion 1992, pp. 101-105; Neyret 1988). Religious associations like *Secours Catholique* and secular ones like *Secours Populaire* functioned as essential providers of relief. It was not until 1990 that the *Revenu Minimum d’Insertion* (RMI) was introduced, and the church and religious associations were among the major pressure groups for it and were heavily involved in its design. The RMI did not replace the existing third sector structures but built upon them. (Religious) associations provide almost all insertion services and, apart from the benefit, the state provides virtually no services. In short, formal separation notwithstanding, the church and religious organizations are key actors with considerable voice and influence, both at the national level (in the evaluation committees, and as a powerful lobby for changes in the legislation) and at the local level (in the local insertion committees, the *Commissions Locales d’Insertion*, and as providers).

A similar set-up can be found in Ireland where the Catholic church became a primary social services provider long before the foundation of the Irish state in 1922. The Charitable Bequests Act of 1844 placed the Catholic church in a very powerful position within Irish society, as it was given ownership and control of many of the schools, hospitals and social services (Powell 2002). When social assistance was drafted, the Catholic

movement quickly pushed the state into a marginal position. Private and voluntary institutions retained a strategic role in delivering the goods. Today, there is still a “shadow welfare state” (Green Paper 1997, p. 31, quoted from Powell 2002), comprised of voluntary religious organizations like the Roman Catholic lay organization, St Vincent de Paul, which has 1,000 branches and approximately 11,000 members (Powell 2002).

In countries with Catholic dominance, the structure of the public assistance system derives from the step-by-step process by which the state assumed responsibility for the poor. With each step, a new group was covered, e.g. the disabled, the elderly without pension entitlements, single parents, immigrants, survivors, and finally all the others who were neither covered by social insurance nor by the already introduced public assistance programs (15). The resulting structure of the public assistance system is categorical: for instance, in France, there are 8 public assistance benefits, in Ireland 12, and in Italy even more (16). This pattern also fits with the Catholic hospital principle, where a wide palette of different institutions existed for the different groups of the poor.

Catholic almsgiving without discrimination between and judgments about the poor is typical for integration policy today, as is relieving poverty without systematically enabling people to overcome it. Individual behavior and willingness to work are far less important in, for example, France than in the Anglo-Saxon countries. The Protestant idea of the calculating poor who would rather receive benefits than work has no hold in France (Paugam 1999, p. 31).

4.2 Societies with a Lutheran Heritage

Because the Lutheran state churches viewed secular social welfare as desirable, states could introduce social protection without the resistance of the church. Germany and the Scandinavian countries had already launched such programs in the late 19th century, and they adopted the social insurance principle to cover major social risks. In the beginning, social insurance left many groups and certain risk cases uncovered but,

(15) This is the French time line: *Minimum Invalité* (disability pension for invalid persons (1930), *Minimum Vieillesse* for the elderly 65+ (1941-1963), *Allocation Adulte Handicapé* (AAH) for disabled persons (1975), *Allocation d'insertion* (AI) (1979), *Allocation Parent Isolé* (API) for single parents (1976), *Allocation Veuvage* (survivors) (1980), *Allocation de Solidarité (ASS)* for unemployed persons whose

regular unemployment insurance has expired = unemployment assistance (1984), *Revenu Minimum d'Insertion* (1989).

(16) It is hard to count the number of public assistance benefits in Italy, as most programs are local and there is considerable local variation in the extent of social provision, particularly between the North and the South.

with time, benefits grew into a comprehensive social protection system. In the course of social insurance expansion, poor relief became residual, though it continued to exist as a last resort supplement. National assistance was introduced at a very late stage in the process of welfare state building, because poor relief had catered only to the “left over” exigencies that were not covered by social insurance. Like poor relief, social assistance was a small residual program. In line with the Lutheran approach of one formalized outdoor relief system for all the poor, social assistance is a unitary and universal program.

Important differences between Germany and Scandinavia are due to the influence of a strong Catholic minority in Germany, which can be seen at the means test and the importance of the third sector. Lobbying of Catholic welfare associations and the influence of Christian Democrats were decisive when in the 1950s Germany’s social assistance legislation was drafted (Heisig 1995). The subsidiarity principle is firmly entrenched into the system. Therefore, the means test includes family members: if the family can support the needy individual, the state denies assistance (17). Another typical feature of German social assistance has been the prominent role of religious welfare associations as services providers and as political actors. In comparison, the third sector has been weak in the Scandinavian countries and it has focused on extremely marginalized groups, like the homeless and substance abusers. In Denmark, the government fully finances and controls these activities, so nobody conceives of it as third sector provision (18).

Long term and mass unemployment has brought about a re-activation of formerly dormant Lutheran elements of social assistance. Germany and Scandinavia introduced social assistance at a time of full employment, and policymakers firmly believed that the tiny program would turn into a completely negligible branch of their welfare states. Typical recipients were the elderly, families with children, single parents, and incapacitated people. Because these groups were “deserving”, they were not expected to work. The so-called “less eligibility principle” – social assistance has to be sufficiently low so that work is more “eligible” – was initially not included in the legislation, and though work requirements were part of the law, they were not applied. In the

(17) Today, parents have to provide for their children and *vice versa*; spouses have to provide for each other, even if they are not married. Until the 1970s, grandparents and grandchildren had to provide for each other as well.

(18) When I did interviews with the Danish government on activation of long-term social assistance recipients with multiple problems, I

asked whether third sector providers were involved. All interviewees denied this until we realized that even though the third sector *is* involved when it comes to severely marginalized groups, nobody frames this as “third sector activity” because the state finances and controls their activities.

1980s, however, social assistance became a major unemployment benefit for all those who were not covered by unemployment insurance, either because they had never worked (youth, immigrants) or because they had been unemployed for a very long time. Because these people were actually expected to work, subsequent social assistance reforms activated the old Lutheran characteristics of social assistance: testing willingness to work, requiring recipients to work in return for the benefit, enforcing job search, cutting benefits to make wage work more attractive, and sanctioning those who were unwilling to work.

The Scandinavian welfare state is often seen as the most advanced welfare state, particularly Sweden. Social assistance was extremely marginal in the past, due to comprehensive coverage with social insurance. However, these countries also never got rid of the poor law tradition, which today manifests itself as a highly corrective activation without the human capital enhancement-focus of traditional labor market policy for the “good” (insured) unemployed. Social assistance recipients have no or only limited access to the activation measures which recipients of unemployment insurance obtain. Vocational education, training and qualification are not (or only at an extremely small scale) available for recipients of social assistance. Nevertheless, the state does recognize a responsibility to provide generous benefits and work opportunities. Severely marginalized people who fail to comply with their duty to work may be punished with benefit cuts or suspensions but social assistance authorities do consider it their responsibility to re-engage them. Most importantly, municipalities are responsible of providing a basal level of assistance, even to those unwilling to work.

4.3 Societies with a Reformed Protestant Heritage

Because Reformed Protestants viewed state involvement in social welfare as incompatible with their social doctrine of self help and local mutual help, the welfare state neither started as early nor did it become as comprehensive as in the Lutheran countries. These countries did not introduce a national social insurance system. In order to cater to the most urgent exigencies, they set up a basal welfare level of social assistance very early, to be complemented by private insurance and non-statist welfare provision.

The United States is a very clear case of a Reformed Protestant social assistance system because, still today, it lacks a comprehensive social assistance network, a national health care system and comprehensive

insurance against unemployment. Similar to the Catholic countries, public assistance benefits were introduced step by step, so that the public assistance system is comprised of many different benefits, some of which are highly stigmatized and ungenerous (e.g. General Assistance, Temporary Assistance to Needy Families), while others are acknowledged and relatively generous (e.g. Supplemental Security Income). A uniform and universal minimum benefit as in the Lutheran countries is difficult to imagine in the United States (and likewise in the United Kingdom). “Welfare” initially excluded the “undeserving” poor – mainly the able-bodied unemployed and African-Americans. There is still today no social assistance guarantee for singles and couples without children.

Both advocates and opponents of recent United States welfare reform have identified the Protestant ethic as its guiding principle. The National Council of Churches has emphasized opportunity, individualism and the work ethic, as well as the importance of fighting fraud and gross inefficiency within the welfare bureaucracy (Steenland 2002). In his programmatic 1992 book *The Tragedy of American Compassion*, Olasky argued that there was a process of social decline in the 20th century, when welfare state builders turned away from an early American “understanding of compassion that was hard-headed but warm-hearted” and based on a Calvinistic understanding of a “God of both Justice and Mercy” (Olasky 1992, p. 8). This book has been very influential in the American Religious Right as a statement against state intervention and for individual self-help. The subsequent book was titled *Renewing American Compassion: How Compassion for the Needy Can Turn Ordinary Citizens into Heroes* (Olasky 1996), and it revokes a Calvinist understanding of faith-based charity – person-to-person administration by the churches, community leaders and ordinary citizens. As a result of Conservative pressure, the 1996 Personal Responsibility and Work Opportunity Act’s “charitable choice” provision significantly strengthened religious providers. This provision basically abolished the church-state division in the field of social assistance because the state pays and controls church based providers of welfare-to-work services (19).

Yet, why should the poor improve themselves if predestination implies that they are sinners anyway, regardless how hard they try to be good? Indeed, Calvinists simultaneously asserted that poverty was predestined and that the poor are responsible for their plight. A very important example for this at first glance ambiguous logic is the “Ame-

(19) Though it is questionable how sharp this division was in the past. See the contributions in Wuthnow 2002.

rican Dream” that justifies inequality (predestination) and makes the poor see only their individual shortcomings (individual responsibility, work ethic etc.). According to this logic, when a poor man makes the move from dishwasher to millionaire, his success shows that he was chosen from the beginning. The Calvinist morals behind the American Dream suggest the poor ought to blame themselves but also hope to be among the few who actually make it through hard work.

In line with the workhouse legacy, Anglo-Saxon welfare-to-work policy centers on the detrimental effects that welfare benefits are argued to have on the work ethic and on social values. Few use the word anymore, but policies are motivated by fears that a dangerous and deviant “underclass” could be fostered by an overly generous welfare system. Fighting benefit dependency, promoting individual responsibility for overcoming poverty, and helping people find jobs as quickly as possible are the major objectives of social assistance policy. The state’s role is limited to easing the transition into the (low wage) labor market. To this end, these countries have established relatively generous Making-Work-Pay policies – the Earned Income Tax Credit in the United States, and the Working Families Tax Credit in the United Kingdom. As a result, the Anglo-Saxon countries have been most successful in getting social assistance recipients into work.

Conclusion

Religion is but one explanation for why we deal with the poor as we do today. Historically, there is a complex interplay between social doctrines about poverty, poor relief, and other factors – like humanism and Enlightenment, mercantilism and capitalism, the worker’s movement and social democracy, large economic depressions and wars, to mention but a few. Nevertheless, Catholic, Lutheran and Reformed Protestant countries do even today have very different legacies of dealing with the poor. Table 2 summarizes some of their central characteristics in a stylized fashion.

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TABLE 2

Stylized features of the Catholic, Lutheran and Calvinist traditions

	Catholicism	Lutheranism	Calvinism/Reformed Protestantism
Poverty is...	God's ordeal	God's ordeal, but also a problem of laziness and immorality	God's punishment for being a sinner and a sign of not being chosen
Work	Work to survive. Work is a burden. If you have other means, work is not necessary	Profile of work is raised, work becomes a calling; striving for material profits beyond one's needs is reprehensible	Work rationally and restlessly to produce more than needed to survive to achieve the <i>certitudo salutis</i>
State of grace can be seen at...	Good works, poverty	Faith only	Hard work and economic success.
Sinning	Buy off one's sins through good works (almsgiving to the beggar)	<i>Gratia amissibilis</i> can always be re-gained by the rueful sinner but nobody can buy himself off by good works	Sins (incl. laziness) are unforgivable. Always live by the rules and work hard, including those who are not <i>electi</i>
Begging is...	Tolerated	Punished	Punished
State responsibility	Rejected	Accepted	Rejected
Role of private charity	Important	Unimportant	Important
Deserving-undeserving distinction is...	Unimportant	Important	Very Important
Individual/group oriented view of poverty	Group oriented; poverty is not stigmatized	Individualized; poverty is stigmatized	Individualized; poverty is stigmatized
Principles of poor relief	<i>Caritas</i> : Almsgiving without too much discrimination between the poor	All the poor should be supported, and the able-bodied should work; if they do not want to, they should be forced to	Workhouse test: correcting and exploiting the able-bodied; helping the unable
Institutional tradition until the 19th century	Hospitals for different groups of the poor, decentralized and private relief	Outdoor relief, financed from the common chest / poor tax, workhouses as deterrent, centralized public relief	Workhouse system, outdoor relief secondary, decentralized private charity

Approach to persistent poverty	Persistent poverty is relieved. Enclosure — and thus exclusion — of the poor in the hospital	Persistent poverty is a societal responsibility. Relief and integration through correction	Persistent poverty is an individual responsibility. It is a sign of not being chosen and a sinner
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Catholic social doctrine continued to view the beggar as closest to Christ. Therefore, so poverty did not carry stigma, and good works, especially almsgiving, guaranteed salvation. Catholic countries only half-heartedly regulated begging. However, notions of how to achieve salvation diversified in a world where life was still oriented towards life after death, and good works lost ground to salvation through faith alone in Lutheranism and to predestination in Calvinism. In Catholicism, poverty is a mark of grace; in Calvinism it is a mark of lacking grace; and in Lutheranism poverty itself says nothing about one's state of grace.

Luther promoted work from a pain to a "calling", a concept that Reformed Protestantism took much further in that rational and restless work became the most reliable signs of election. These changes in the Protestant societies generated a new view on beggars and opened a question: why should the Christian community support people who were not working, if work was a calling every Christian should follow? In both Lutheran and Reformed Protestant territories begging was then forbidden and punished.

Catholic poor relief remained a responsibility of the hospitals and private charity. Lutheran poor relief was predominantly organized as outdoor relief, to be financed out of the common chest and later on a poor tax. Reformed Protestant poor relief for the able-bodied was institutionalized in the workhouse. As to the institutions of poor relief, Catholic systems remained decentralized; Lutheran systems were highly centralized; and Reformed Protestant systems were somewhat but not systematically centralized. The Catholic hospitals systematized traditional *caritas*, which embraced a variety of needs, thus showing a relatively high level of social tolerance, even though it precluded a right to relief. Lutheran outdoor relief institutionalized a societal responsibility for supporting the poor that was guaranteed through formalized eligibility determination, and it sought to bring the able-bodied to work. The Reformed Protestant system did not institutionalize responsibility *for* but *of* the poor, enforcing work discipline and providing only meager relief.

Catholic subsidiarity and Reformed Protestant individualism and voluntarism both attribute a negative role to the state. In countries

under Catholic or Reformed Protestant dominance, poor relief was not secularized as early and as comprehensively as in the Lutheran countries, and private charity, families and mutual help remained important sources of support. Poor relief officials were mainly representatives of the clergy. Countries under Lutheran dominance, in contrast, secularized church property in the course of the Reformation and assigned a positive role to the state very early on. In accordance with Lutheran poor law, these countries established tax-based and centralized systems of poor relief. Poor relief officials were laymen and employed by secular authorities.

Only if there was a strong state-church conflict in which the state prevailed (France) could poor relief be secularized – but never as early and to the same extent as in the Lutheran countries, where national assistance was introduced at a very late stage in the process of welfare state building, to fill the last holes in the safety net. In line with the Lutheran tradition of universal outdoor relief, social assistance has formalized eligibility rules and generous benefit rates. Reformed Protestant countries were first to adopt national social assistance schemes, to provide a modest level of relief to most urgent exigencies where self-help failed, without restricting private insurance and non-statist welfare provision.

Returning to the questions in the beginning of the paper, the importance of these historical differences becomes clear when we look at patterns of social assistance today. In contrast to most OECD countries, Italy, Spain and Greece *lack* social assistance, because they lack a secular tradition of poor relief. In contrast, the Scandinavian and German social assistance systems are unitary, uniform and generous, because in Lutheran social doctrine, the secular authorities should deliver relief to *all* of the poor in a uniform way. French social assistance is as ungenerous as in the United States because, both in the Catholic and the Reformed Protestant poor relief tradition, the state is to step in as little as possible.

The fundamental tension in poor relief is that between granting economic support *and* ensuring that everybody who can work in fact does. Each tradition has solved this goal conflict differently, as not only the timing, structure, and generosity of social assistance schemes suggest, but also the welfare-to-work policies for long-term unemployed social assistance recipients. Countries with a Catholic legacy stress “welfare” in the sense of delivering money and services and generally lack a work objective (e.g. France, Italy). Countries with a Lutheran legacy try to both provide generous welfare benefits and to bring able-

bodied social assistance recipients into work, which often turns out to be public works outside the labor market (e.g. Sweden, Denmark, and Germany). Countries with a Reformed Protestant legacy unequivocally support and enforce “work first” as the best guarantor of economic and social inclusion (e.g. United States, United Kingdom).

Each strategy creates particular problems within the work-welfare trade-off: integration strategies historically rooted in Catholicism provide social assistance benefits or other local support but permanently exclude the long-term unemployed from work. Integration strategies rooted in Lutheranism prevent economic hardship and provide work but institutionalize an inferior kind of work outside the labor market. Integration strategies historically rooted in Reformed Protestantism promote (low wage) labor market integration at the expense of guaranteeing an economic and social minimum.

These juxtapositions of countries’ traditions are rather rough and they do not do justice to variations within each tradition and to the influence of religious minorities (20). But they do show that differences between countries’ poverty policy traditions are systematic, suggesting the need for a fuller historical exploration of links between denominational social doctrines and poor relief traditions. They also suggest that systematically accounting for confessional differences might enrich existing explanations of the welfare state.

Religion is one of the deepest layers of social reality, and it can influence reality very differently. The literature has identified many indicators to measure the “religious factor”, including Christian party strength, the power of churches and/or religious movements as direct actors, or the professed beliefs of individuals. Denominational social doctrines are less easy to trace but have for centuries shaped both perspectives on poverty and the institutions of poor relief, even when they became part of state poverty policy. In this vein, loss of secular power by the church does not equal loss of spiritual power; it does not mean that the already existing institutions and the principles they embody and perpetuate are abandoned; and, finally it does not mean that secular

(20) It is relatively easy to arrive at these three traditions. What is more difficult is to explain the nuances of difference within, and overlaps between, clusters. Proportions and regional differences in mixed denominational countries matter a great deal, as do differences within Lutheranism, Calvinism and Catholicism. To look at this, it would be necessary to consider the impact of minority denominations on the dominant religion, like the Free

Church influence in Sweden, that may explain the strong temperance movement in Sweden and the absence thereof in Denmark, or the impact of Calvinism on the Lutheran Church and Pietism on 19th century German social reformers. On the other hand, the impact of the dominant denomination on minority denominations is important, e.g. the influence of Calvinism on Lutheranism and Catholicism in the United States.

principles of welfare state provision are not now rooted in Christian postulates. Despite the immense changes the welfare state brought about, much of the national continuities in attitudes towards, and policies against, poverty can be traced back to religious roots.

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