

# **Australia's Disabling Income Support System**

Tracing the history of the Australian disability income support system 1908 to 2007:

Disablism, citizenship and the Basic Income proposal

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## ABSTRACT

The present study examined the historical basis of the Australian disability income support system from 1908 to 2007. Although designed as a safety net for people with a disability, the disability income support system within Australia has been highly targeted. The original eligibility criteria of “permanently incapacitated for work”, medical criteria and later “partially capacitated for work” potentially contained ideological inferences that permeated across the time period. This represents an important area for study given the potential consequence for disability income support to marginalise people with a disability.

Social policy and disability policy theorists, including Saunders (2007, Social Policy Research Centre [SPRC]) and Gibilisco (2003) have provided valuable insight into some of the effects of disability policy and poverty. Yet while these theorists argued for some form of income support they did not propose a specific form of income security for further exploration. Few studies have undertaken a comprehensive review of the history of disability income support within the Australian context. This thesis sought to redress these gaps by examining disability income support policy within Australia. The research design consisted of an in-depth critical historical-comparative policy analysis methodology. The use of critical historical-comparative policy analysis allowed the researcher to trace the construction of disability within the Australian disability income support policy across four major historical epochs. A framework was developed specifically to guide analysis of the data. The critical discourse analysis method helped to understand the underlying ideological dimensions that led to the predominance of one particular approach over another. Given this, the research purpose of the study centred on:

- i. Tracing the history of the Australian disability income support system.
- ii. Examining the historical patterns and ideological assumptions over time.
- iii. Exploring the historical patterns and ideological assumptions underpinning an alternative model (Basic Income) and the extent to which each model promotes the social citizenship of people with a disability.

The research commitment to a social-relational ontology and the quest for social change centred on the idea that “*there has to be a better way*” in the provision of disability income support. This theme of searching for an alternative reality in disability income support policy resonated throughout the thesis. This thesis found that the Australian disability income support system is disabling in nature and generates categories of disability on the basis of ableness. From the study, ableness became a condition for citizenship. This study acknowledged that, in reality, income support provision reflects only one aspect of the disabling nature of society which requires redressing. Although there are inherent tensions in any redistributive strategy, the Basic Income model potentially provides an alternative to the Australian disability income support system, given its grounding in social citizenship. The thesis findings have implications for academics, policy-makers and practitioners in terms of

developing better ways to understand disability constructs in disability income support policy. The thesis also makes a contribution in terms of promoting income support policies based on the rights of all people, not just a few.

## **KEYWORDS**

Social policy, disability, critical historical-comparative policy analysis, critical discourse analysis, disablism, Australian disability income support system, Basic Income model, social citizenship

## TABLE OF CONTENTS

ABSTRACT .....	i
KEYWORDS.....	iii
TABLE OF CONTENTS .....	iv
LIST OF FIGURES .....	vii
LIST OF TABLES .....	viii
STATEMENT OF ORIGINAL AUTHORSHIP.....	ix
ACKNOWLEDGEMENTS.....	x
LIST OF RELEVANT PUBLICATIONS RELATED TO THE STUDY .....	xii
<b>INTRODUCTION .....</b>	<b>1</b>
I.I Introduction .....	1
I.II Situating the Study .....	5
I.III Overview of Chapters .....	9
I.IV Chapter Conclusion: Situating the Study .....	12
<b>PART ONE: THE IDEOLOGY OF DISABLISM AND THE AUSTRALIAN DISABILITY INCOME SUPPORT SYSTEM</b>	
<b>CHAPTER ONE: A Social Theory of Disability and Disability Income Support Policy Constructions .....</b>	<b>17</b>
1.1 Introduction .....	17
1.2 Disability Constructions and Language .....	17
1.3 A Social Theory of Disability and Disability Policy.....	19
1.4 Modernity and Post-Modernity: Implications for Disability Policy .....	27
1.5 Disability and Income Support Policy .....	31
1.6 Chapter Conclusion .....	33
<b>CHAPTER TWO: Disability Income Support Policy in Australia: Contextualising Historical Debate in the 20<sup>th</sup> and 21<sup>st</sup> Centuries .....</b>	<b>35</b>
2.1 Introduction .....	35
2.2 Foundations of the Australian Income Support System .....	35
2.3 Broad Overview of the Australian Disability Income Support System.....	37
2.4 Income Support Policy and the Contentiousness of the Poverty Concept.....	41
2.5 “The Paupers Lot in Life”: Disability Constructs and the Argument for Income Support. .....	46
2.6 Chapter Conclusion .....	48

**CHAPTER THREE: The Use of Critical Historical-Comparative Policy Analysis and Critical Discourse Analysis Method to Explore Disability Income Support ..... 51**

3.1 Introduction.....	51
3.2 Use of Critical Historical-Comparative Policy Analysis .....	51
3.3 Method .....	55
3.4 Issues of Research Integrity.....	77
3.5 Chapter Conclusion.....	78

**INTRODUCTION TO CHAPTER FOUR AND CHAPTER FIVE: Tracing the History of the Australian Disability Income Support System, 1908 to 2007: The Emergence of the Disabled Bludger Construction ..... 81**

**CHAPTER FOUR: Epoch One: Plight of Invalidism and Epoch Two: Invalid Pension Moral Transition ..... 85**

4.1 Introduction to the Chapter.....	85
4.2 Epoch One - 1908-1940: 'Plight of Invalidism': Enactment & Implementation of the Invalid Pension .....	85
4.3 Epoch Two - 1941-1985: Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering) .....	115
4.4 Chapter Conclusion.....	141

**CHAPTER FIVE: Epoch Three: A 'Liberalising' Change and Epoch Four: The 'Disabled Bludger' ..... 143**

5.1 Introduction to the Chapter.....	143
5.2 Epoch Three - 1986-1995: A 'Liberalising' Change? <i>Activ[e]</i> ating the Disability Support Pension .....	143
5.3 Epoch Four - 1996-2007: The 'Disabled Bludger': A Shift from Plight of the Invalid and Genuinely Unemployed.....	170
5.4 Chapter Conclusion: Bringing Together the Themes from Chapter Four and Chapter Five.....	206

**PART TWO: THE POTENTIAL FOR A "BETTER WAY"? EXPLORING THE BASIC INCOME PROPOSAL**

**CHAPTER SIX: *Setting the Scene*. Social Justice and the Basic Income Model: Emerging Insights and Relevance of the Model for Comparative Analysis ..... 213**

6.1 Introduction.....	213
6.2 The Basic Income Alternative .....	215
6.3 The Treatment of the Disability Dimension and Basic Income in Income Support Policy Debates .....	217
6.4 Early Basic Income Proposals: Conceptual History.....	212
6.5 Contextual History of Australian Debates on Basic Income Proposals .....	224
6.6 Chapter Conclusion.....	225

<b>CHAPTER SEVEN: Social Citizenship, Non-Disablism and the Basic Income Proposal</b>	<b>227</b>
7.1 Introduction to the Chapter .....	227
7.2 Emerging themes of Social Justice, Non-Disablist Principles and Citizenship .....	228
7.3 Intellectual Challenges Relevant to the Basic Income Proposal and Non-Disablism.	269
7.4 Chapter Conclusion .....	282
<b>CHAPTER EIGHT: Conclusion: Future Considerations for Disability Income Support Policy...</b>	<b>285</b>
8.1 Introduction .....	285
8.2 Summary of Disability Income Support and Basic Income Insights .....	287
8.3 Potential for Future Disability Income Support Policy Research .....	294
8.4 Tentative Conclusions: <i>There has to be a Better Way</i> . The Potential for an Alternative Disability Income Support Model .....	299
8.5 Concluding Comments .....	300
<b>REFERENCES .....</b>	<b>303</b>
<b>APPENDIX ONE .....</b>	<b>365</b>
<b>APPENDIX TWO .....</b>	<b>381</b>
<b>APPENDIX THREE .....</b>	<b>387</b>
<b>APPENDIX FOUR .....</b>	<b>391</b>
<b>APPENDIX FIVE .....</b>	<b>427</b>
<b>APPENDIX SIX .....</b>	<b>437</b>



## LIST OF FIGURES

<i>Figure 1: The four theorists' typologies of welfare state regimes relevant to present study in comparative policy analysis, including dimensions not revealed</i> .....	53
<i>Figure 2: Disability Income Support Analytical Framework: Extension of four typological components to incorporate additional historical disability dimensions</i> .....	54
<i>Figure 3: Dimensions of critical discourse analysis from description to explanation (Fairclough, 2003; Gramsci, 1977, 1996)</i> .....	56
<i>Figure 4: Research "funnel" incorporating cyclical nature of the study's qualitative research process</i> .....	69
<i>Figure 5: 'Commonwealth'. Cartoon created by Cotton, H., 1872-1931. Reproduced courtesy of the National Library of Australia: <a href="http://www.nla.gov.au/pict/pic">http://www.nla.gov.au/pict/pic</a></i> .....	87
<i>Figure 6: 'Blind Beggar', Melbourne, Victoria. 'Image courtesy of Vision Australia Heritage Collection'. Available from: <a href="http://www.visionaustralia.org.au/info.aspx">http://www.visionaustralia.org.au/info.aspx</a></i> .....	109
<i>Figure 7: Image 'John Curtin: A fair go for all': Australian Labor Party election material: '1946 Repeats Itself: Chifley Spells Security' courtesy of the Chifley Research Centre <a href="http://www.laborhistory.org.au">http://www.laborhistory.org.au</a></i> .....	117
<i>Figure 8: Part of the Pryor collection of cartoons and drawings. Cartoon created by Pryor, Geoff. Reproduced courtesy of National Library of Australia: <a href="http://www.nla.gov.au/pict/pic">http://www.nla.gov.au/pict/pic</a></i> .....	131
<i>Figure 9: 'Happy days are here again' [Paul Keating singing to dole queue [picture]. Cartoon created by Moir, Alan. Reproduced courtesy of the National Library of Australia <a href="http://www.nla.gov.au/pict/pic">http://www.nla.gov.au/pict/pic</a></i> .....	145
<i>Figure 10: 'Paul Keating receiving a medal for 1.2% inflation while riding on the back of the unemployed' [picture]. Cartoon created by Pryor, Geoff. Reproduced courtesy of National Library of Australia <a href="http://www.nla.gov.au/pict/pic">http://www.nla.gov.au/pict/pic</a></i> .....	166
<i>Figure 11: Cartoon by Nicholson from "The Australian" newspaper: <a href="http://www.nicholsoncartoons.com">http://www.nicholsoncartoons.com</a>.</i> .....	176
<i>Figure 12: Cartoon by Nicholson from "The Australian" newspaper: <a href="http://www.nicholsoncartoons.com.au">http://www.nicholsoncartoons.com.au</a></i> .....	189
<i>Figure 13: Research rigour: Example of theoretical note</i> .....	376
<i>Figure 14: Research rigour: Example process note</i> .....	377

## LIST OF TABLES

Table 1 Key Time Periods and Emerging Themes .....	38
Table 2 Major Historical Epochs and Identified Patterns Framing the Study .....	60
Table 3 Selection Criteria and Definition .....	64
Table 4 Major Historical Epochs and Emerging Themes Underpinning the Australian Disability Income Support System.....	72
Table 5 Emerging Themes Underpinning Basic Income Model Comparison .....	76
Table 6 Major Historical Epochs and Distinctive Characterising Themes.....	81
Table 7 Summary of Identified Sub-Themes Characterising the Themes Across the Four Epochs.....	83
Table 8 Challenges to the Introduction of a Basic Income in Australia across the Four Epochs.....	225
Table 9 Summary of Identified Basic Income Sub-Themes for Theme 1.....	229
Table 10 Summary of Identified Basic Income Sub-Themes for Theme 2.....	229
Table 1.1 Research Design Structure for this Study of Disability Income Support .....	366
Table 2.1 Application of Data Collection Strategies for Historical Dimension.....	381
Table 3.1 Application of Data Collection Strategies for Comparison Dimension.....	387
Table 4.1 Major Historical Epochs and Distinctive Characterising Themes.....	391
Table 4.2 Snapshot of Policy Text Sources.....	392
Table 5.1 Major Historical Epochs and Distinctive Characterising Themes.....	427
Table 5.2 Policy Text Snapshot.....	428

## STATEMENT OF ORIGINAL AUTHORSHIP

*The work contained in this thesis has not been previously submitted to meet requirements for an award at this or any other higher education institution. To the best of my knowledge and belief, the thesis contains no material previously published or written by another person except where due reference is made.*

Signature: Jennifer M. Mays

Date: 22 October 2012

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## LIST OF RELEVANT PUBLICATIONS RELATED TO THE STUDY

Mays, J. (2005a). Employment and disability: Some emerging questions. In G. Wrightson (Ed.), *Creating a Culture of Full Employment incorporating the 7th Path to Full Employment Conference and 12th National Conference on Unemployment Proceedings* (pp. 243-253) Newcastle, Australia: The University of Newcastle.

Mays, J. (2005). Income support for people with a disability. In C. Bailey & K. Barnett (Eds.), *Social Change in the 21st Century 2005 Conference Proceedings*. Brisbane, Australia: Centre for Social Change Research, School of Humanities & Human Services, Queensland University of Technology. Retrieved from: <http://www.socialchange.qut.edu.au/>

Mays, J. (2006). Australia's disabling income support system. BIEN 11<sup>th</sup> International Congress: *Universalism Strengthens Development Conference*, 2-4 November, University of Cape Town, Cape Town, South Africa.

Mays, J. (2006). Feminist disability theory: Domestic violence against women with a disability. *Disability & Society*, 21(2), 147-158.

## INTRODUCTION

### *“Kick It Over”*

#### **Contextualising the Social Dimensions of Disability Income Support Policy and an Alternative, Basic Income Model**

Stay around don't play around  
This old town and all  
Seems like I got to travel on

A lot of people won't get no supper tonight  
Justice tonight

Runnin' and a hiding tonight  
Justice tonight

Remember to kick it over  
No one will guide you through armegideon time  
It's armagideon  
It's not Christmas time

A lot of people  
A lot of people use a calculator  
A lot of people won't get no supper tonight  
A lot of people sittin' down by the light

The battle is getting' hotter  
Armagideon time  
Armagideon

Remember to kick it over  
Armagideon time

A lot of people ain't got no supper tonight  
A lot of people got to stand out back

(Lyrics from Justice tonight/kick it over, The Clash, 1979, US Version)

### **I.I Introduction**

The issue of equity underpinning the provision of disability income support is central to this thesis and forms part of a long standing discussion in social policy and disability literature. Although different positions are held in terms of income support models and policy focus, a key element underpinning the position of writers who call for a socially just approach (such

as Barnes & Mercer, 2005, and Saunders, 2006, [SPRC]) is the need for egalitarianism in the pursuit of social citizenship of people with a disability. This is particularly so in terms of addressing issues of oppression and the consequences of poverty. The above lyrics by The Clash which suggested “*a lot of people won’t get no supper tonight, justice tonight*” sets the scene for this study, as the thesis examines the implications of the Australian disability income support system, using a framework grounded in social justice principles across four epochs. A central concern for this thesis, which is found in the lyrics, is the call for justice and fairness in alleviating poverty for people who are disadvantaged and, particularly for this study, redressing the poverty experienced by people with a disability who are in receipt of disability income support.

### **Egalitarianism: Social citizenship incorporating the dimension of social inclusion**

This thesis employs social citizenship<sup>1</sup> as an inclusive concept that incorporates the dimensions of social inclusion and justice. Income poverty has been recognised by disability social theorists (including Abberley, 2002; Barnes, 2007; Barnes & Mercer, 1997, 2003, 2005; Palmer, 2011) as one source of social exclusion for people with a disability. Prior to contextualising the notion of social citizenship, any examination of social policies surrounding disability income support requires some explanation of the concept of social inclusion. The notion of social inclusion is highly contentious given that it is a nebulous term (Bloch, 2008; Paz-Fuchs, 2007; Saunders, 2003, 2007, [SPRC]; C. Williams & Winderbank, 2001). However, recognising the value of the concept of social inclusion assists in pursuing alternative income support policies that can address marginalisation. This also helps to explore barriers which prevent people with a disability from attaining an adequate standard of living. Although internationally and nationally, income support policies are seeking to redress the issue of social exclusion, Bloch (2008), Lister (1990, 2004, 2008), Paz-Fuchs (2007) and the Organisation for Economic Co-operation and Development (2008, [OECD]) found that within advanced Western neo-liberal democracies, the inequalities and poverty gaps have widened rather than closed. Further, the concept of social inclusion has undergone many transformations within social policy income support spheres. The changing conceptualisation of the social inclusion term over time has become somewhat “de-radicalised” (Preston & Rajé, 2007; Stanley & Vella-Brodrick, 2009).

Even with the well-meaning intentions of policy-commentators, political leaders and community stakeholders, the concept of social inclusion has almost become devoid of the

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<sup>1</sup> The notion of a citizen in the thesis will be employed to denote both a person who is formally a citizen of a nation and a person who has been accepted by the Government to be a permanent resident. The term citizenship will be used to mean the formal status of being a citizen but will also apply to permanent residents. Citizenship, from the social relational position, argues for the achievement of social, civil, political and human rights and social inclusion of people with a disability in society, or everyday life (Duffy, 2006).



socio-political elements necessary for designing appropriate policy responses that help to alleviate poverty. Disability social theorists (including Clear & Gleeson, 2002) used similar understandings to Gramsci's (1977) of the concept, whereby social exclusion is linked to hegemony and capitalist systems which oppress people with a disability. For Lister (1990, 2004, 2008), social inclusion and social citizenship are inextricably linked to issues of citizenship and poverty. The connection between social inclusion and social citizenship is highly relevant given that people with a disability need not only to have opportunities to engage in the struggle for social, political, economic and cultural rights, but also to have access to resources, including a decent income (Lister, 2008; Oliver, 2009).

While some writers, such as Gannon and Nolan (2006) and Saloojee (2003), distinguish between social citizenship and social inclusion, for the purpose of this thesis, social citizenship is an all-encompassing concept which incorporates Lister's (1990, 2004, 2008) notions of social inclusion and poverty in the pursuit of income support policies that are supported by an egalitarian society.

The concept of social citizenship sets the scene for arguing for an egalitarian society in which an inclusive income support is available for all. For example, Thomas Paine, during the late 1700s, called for an egalitarian approach in which different pension payments, such as the Old-Age Pension, were established in terms of a right, rather than based on charitable and deserving poor ideals (Standing, 2002). The relevance of Paine's writings to this thesis is in the capacity for developing income support policies that call for the redistribution of wealth and the upholding of rights and justice, particularly in terms of collective benefit. Redistribution through progressive taxation provides one such mechanism which, as Galbraith (1996) recognised, allowed for the "more equitable distribution of income ... as a fundamental tenet of modern public policy in the good society" (p. 65). Raventós (2007) highlighted the need for transparency in the moral commitment for inclusive and just disability income support policy.

Wilkinson and Pickett (2009) suggested that an unequal society affects people across all income levels, rather than solely at the poverty level (p. 190). They highlighted that the focus of study into income distribution should be on the unintended consequences of ideological dimensions underpinning income support policies. Thus, guided by Wilkinson and Pickett the following thesis statement underpinned the study:

*This thesis examines the extent to which the Australian disability income support model, based on targeting, reinforces and perpetuates disablism. It further explores the degree to which the Australian disability income support system potentially contradicts the principles of social citizenship for people with a disability who receive income support.*

## **Contextual background to the study**

Contemporary Western Industrial societies, such as Australia, have pursued income support policies based on a range of welfare regime types framed in terms of their ideological position (Esping-Andersen, 2003; Goodin & Smitsam, 2000; Schröder, 2009). The inherent ideological persuasions underpinning disability income support policies have had a profound effect upon the way in which disability is constructed and perceived by political leaders and the general community. In line with the consequences of the construction of disability in disability income support policy is the tendency for minimalist approaches to policy responses to be adopted by Australian Governments (Hartman, 2002; McGrath-Champ & Searle, 2005; Stilwell, 1994) no matter how worthy their intentions to provide decent income support to people with a disability. Often the original intent of disability income support policies becomes so watered down, that there are few just outcomes for people with a disability (Oliver, 2009).

Thus, research into the area of disability income support policy emerged from this researcher's passion for social justice, equity and non-disablist policies together with an inherent belief in the value and worth of all people. Research articles, particularly Gibilisco (2005), Palmer (2011), Rioux (1994), Saunders (2002a, 2002b, 2005a, 2005b, 2005c, 2007, [SPRC]) and this researcher (see Mays, 2003, 2006), pointed to the higher incidence of poverty among people with a disability when compared with people who do not identify as having a disability. They also suggested the need for some kind of income support provision to assist in maintaining an adequate level of subsistence for people with a disability. However, while these contributions provided valuable insights into the disabling effects of disability and poverty, they did not propose a specific income security model for exploration. Few studies have undertaken a comprehensive review of the history of disability income support within the Australian context. This thesis seeks to redress these gaps by examining disability income support policy within Australia, and the alternative Basic Income model based on universal principles. This study also acknowledges that, in reality, income support provision reflects only one aspect of the disabling nature of society, which requires redressing.

Saunders (2005a, 2005b, 2005c, 2006, 2007, [SPRC]) provided justification for this study in his research on income support for people with a disability, and poverty consequences by suggesting the need to explore the relationship between income support, poverty and ideology. He contended that gaps exist in this type of policy research as a result of the tendency for many social policy analysts to over-emphasise practice-oriented research on social services for people with a disability. Saunders also found that policy research can treat income support and disability as distinct entities, without examining the relationship between ideology and poverty implications. This gap in policy research has implications for the thesis,

in that an exploration of disability income support policy and the connection with ideology and poverty is required.

### **Disability income support policy and the need for egalitarianism**

The onslaught of neo-liberal policies which have dominated the past thirty years of disability income support policy have done little to promote a socially just society where all citizens are treated fairly. Rather, dominant market ideals and traditional conceptualisations of disability become divisive tools for marginalising the very vulnerable people that the policies are “supposed” to support. Welfare policy is a powerful tool which can influence and shape ideology. From the outset, the researcher explicitly draws on a social theory of disability and Gramsci’s (1977) analysis to frame the study of disability income support policy.

### **Engendering a disability policy commitment based on social citizenship**

The researcher engages in the debates framing Australian disability income support policy (including alternative models) in order to explore the site of oppression (deriving from non-inclusive policies) for people with a disability in receipt of disability income support. An overview of the thesis, including a justification of the research aims and methodological framework, is provided. This is followed by a brief synopsis of each chapter in the thesis, namely: Part One: *The ideology of disablism and the Australian disability income support system* and Part Two: *The potential for a “better way”? Exploring the Basic Income proposal*. A critical examination of the history of research in these areas and identified gaps in the body of knowledge is undertaken. The chapter also explores and develops the research question.

## **I.II Situating the Study: Research Focus, Purpose and Objectives**

Drawing on the notion of disablism provides a basis for examining the historical patterns and ideological dimensions underpinning the Australian income support to people with a disability from 1908 to 2007.

### **Research focus and purpose**

Although acknowledged as an important element of social policy research a rigorous analysis of the ideology underpinning disability policy has not necessarily occurred in the case of disability income support policy. This study therefore provides a different standpoint in the examination of the Australian targeted disability income support system and the reason for its dominance in the political social policy landscape. Few alternative models have been proposed or enacted. The present study focuses on historical patterns and ideological features of disability income support policy and as such responds to the concerns outlined by the disability social theorists Barnes and Mercer (2005) and Oliver (1989, 2009).

Barnes and Mercer (2005) noted that “few social theorists have pursued their analyses [of disability benefits and services] in ways that enlighten the circumstances of experiences of disabled people” (p. 539). Thus analyses should encapsulate the exploration of ideological dimensions. More than two decades ago, Oliver (1989) highlighted this very point. Oliver recognised the need for engaging with the notion of ideology in disability policy research. He argued that not all social policy analysis or development has incorporated an exploration of the function of ideological dimensions (p. 7). He went on to say:

although in recent years it has been given a much more central focus ... disability policy has not been subjected to any rigorous analysis of its ideological underpinnings in the same way that many other social problems have been de-constructed and even re-constructed. (p. 7)

This above point continues to be relevant today as few studies on the Australian disability income support system have comprehensively examined the ideological assumptions that influence policy responses over time. Oliver (2009) later argued that examining ideological dimensions helps engagement in the pursuit of alternative strategies for the betterment of society.

The emphasis on disability income support policy centres on the understanding that people with a disability have had a long history of being reliant on disability income support and excluded from the labour market. Even when changes to disability income support systems occurred, often the ideological consequences of the policy changes tended to be overlooked. These considerations of intended and unintended consequences for people with a disability in receipt of disability income support helped to frame a relevant research question for the present study. Further, the Australian model of disability income support has long been associated with targeted types of income support. Thus, the study addresses the primary research question:

- *What underpins the Australian disability income support system and leads to the dominance of the targeted income support system for people with a disability over alternative models?*

In tracing the historical developments and ideological assumptions, the study identifies *the points at which significant policy constructions of disability were introduced* and the relevance of an *alternative model* to the existing Australian disability income support system.

Specifically the purpose of the study entails:

- i. Tracing the history of the Australian disability income support system.
- ii. Examining the historical patterns and ideological assumptions over time.

- iii. Exploring the historical patterns and ideological assumptions underpinning an alternative model (Basic Income) and the extent to which each model promotes the social citizenship of people with a disability.

In order to achieve these aims, the study uses critical historical-comparative policy analysis methodology. The critical discourse analysis method allows the examination of disability policy text to extrapolate policy rhetoric.

### **Theoretical Framework**

There is an extensive body of knowledge on the Australian targeted income support system. Some of the literature is supportive while other texts are critical of the Australian income maintenance system. For example, Brown (2011) and Saunders (2004a, 2004b) from the Centre for Independent Studies [CIS] have long supported the use of a targeted approach to income support within Australia. In contrast, Castles (2001), Cook (2006), Engels (2006), and Saunders (2006, [SPRC]) have provided critiques on the implications of the Australian targeted income support system. Social policy analyses on income support are underpinned by two contrasting approaches with distinct ideological premises around the way resources are distributed and allocated (C. Alcock, Payne & Sullivan, 2004; Cook, 2006; Dean, 1999; Engels, 2006; Gil, 1992; Lund, 2006; McClelland, 2006; Pollard, 1992; A. Pratt, 1998, 2006; J. Pratt, 2006; Saunders, 2005a, 2005b, 2005c, [SPRC]; Tomlinson, 2000a). C. Alcock et al. (2004) stated that when addressing poverty, governments adopted different models of income support. Given that the dominant Australian model of income support has historically been based on targeting<sup>2</sup>, an alternative model with similar policy objectives, yet contrasting principles needed to be adopted (Gil, 1992; McClelland, 2006; Palmer, 2011).

The study maintained logical consistency by employing an analysis of comparative conceptual models. Comparative conceptual models are acknowledged methods within the social policy body of knowledge. While other models of income support, such as the Swedish social democratic or German models (Goodin, 2001; Standing, 2002), could have been adopted for comparison with the Australian targeted approach, the Basic Income model was employed in the study as a comparison. The Basic Income model allows for maintaining the integrity of the social policy logic and research design, based on the key ideological distinctions between the Australian disability income support system and the alternative, Basic Income. For example, the Australian disability income support system and Basic Income have differing ideological positions. Yet both embrace the moral principles of citizenship and participation. The Australian disability income support system and the

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<sup>2</sup> Targeting within social policy research refers to the process of identifying and homing in on the people who are deemed (by the government authority) to be most in need or most vulnerable to poverty (C. Alcock et al., 2004; Cook, 2006; McClelland, 2006). Stringent eligibility criteria and poverty indicators assist in making administrative determinations of “who is most in need”, hence the categorisation of pension payments, according to factors such as age and disability (C. Alcock et al., 2004).

alternative Basic Income model operationalise the principles in clearly distinct ways (C. Alcock et al., 2004; P. Alcock, 2008; Cook, Pollard, 1992; Lund, 2006; A. Pratt, 1998, 2006; J. Pratt, 2006). It is these nuances that allow for an exploration of the provision of income support within a country by examining the Australian targeted disability income support system and the alternative universal Basic Income model.

Developments in the discussion of Basic Income, such as Offe (2004) and Raventós (2007), demonstrate the increased legitimacy of examining such a model to contrast with the existing Australian disability income support system. Few Basic Income proponents (contra is Murray, 2008 and Standing, 2005) supported the inclusion of disability dimensions and the social theory of disability within Basic Income analyses. This thesis argues that for an alternative model to be truly inclusive, some exploration of the relevance of the disability dimension is required.

Basic Income applied as a comparative model maintains the logical coherence of the research design. The Basic Income model, in its purest sense, remains ideologically distinct from the Australian targeted disability income support system. Further justification for the selection of Basic Income as a suggested alternative can also be found in the works of Bessant, Watts, Dalton and Smyth (2006), Goodin, Headey, Muffels and Dirven (2000), Standing (1999, 2002) and Tomlinson (2000b). Adopting a similar stance to these policy theorists (for example, Goodin et al., 2000; Tomlinson, 2000b), Raventós (2007) argued that the merits of Basic Income derive from the notion that the provision is a universal scheme. Chapter Six discusses the relevance of Basic Income as an alternative model in greater detail.

### **Boundaries of the study focus**

The focus of the thesis is on disability income support within the context of the Australian income support system. Consideration was given to the differences within Australia, across payment provisions, in terms of benefits and allowances. In addition to the Australian disability income support system (disability pension payments from 1908 to 2007), other income support payments<sup>3</sup> were implemented by the Government of the day to assist people with a disability (Bessant et al., 2006; Gil, 1992; Smyth, 2006; Whiteford, 1998; Whiteford & Angement, 2001, 2002). There is no doubt as to the significance and influence of these payments on the Australian income support system. However, in this research project, only minor reference to benefits and allowances is made.

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<sup>3</sup> In broad terms, these provisions included, the service pension (permanently unemployable veterans); tuberculosis allowance; sickness benefit; handicapped child's allowance; sheltered employment allowance; workers' compensation; road accident compensation; and occupational superannuation (Jordan, 1984).

## **Significance of researching disability income support policy: Contribution to the field**

This thesis contributes to new research in social policy by exploring income support to people with a disability. Within Australia, the first Federal income support legislation for people with a disability was introduced in 1908 and enacted as the Invalid and Old-Age Pensions Act (Daniels, 2006). Administration of the Commonwealth Invalid and Old-Age Pensions Act commenced in 1909 for Aged Pensions and in 1910 for Invalid Pensions (Bessant et al., 2006; Daniels, 2006). The commencement of the Commonwealth Invalid and Old-Age Pensions Act in 1908 was significant in that the legislation represented the first platform, following Federation in 1901, for the establishment of an income support system within Australia. On the international level, Australia was one of the first countries to introduce a nationwide government-funded income support system, apart from the English Poor Laws of the 1600s and 1800s and Bismarck Welfare Policies during the 1880s, in Germany (Evans, 1978). Countries such as Germany looked to the Australian model for the development of similar responses to welfare relief (Bessant et al., 2006). The study provides a further contribution to the wider body of knowledge through its exploration into income support to people with a disability, and historical material (disability) dimensions within the context of disability income support and alternative models (Basic Income).

The study also contributes to the existing body of knowledge by developing an increased understanding of the historical basis of income support for people with a disability and generates a comparison of the current targeted income support system with an alternative: the Basic Income model. Such an understanding derived from the study provides an original contribution in the areas of income distribution, social policy and disability theory as it seeks to increase knowledge of the nature of the Australian income support system in relation to people with a disability. This research extends existing knowledge of social policy income support to incorporate disability by determining the relevance of each model's approach. In order to trace the historical patterns and ideological dimensions over an extended period of time, the study covered the period from 1908 to 2007. Policy and practice implications emerge from the study concerning the way disability is constructed and conceptualised in disability income support. A better understanding of the influence of ideological dimensions provides the means for proposing alternatives.

## **I.III Overview of Chapters**

A key feature of the thesis is the analysis of the Australian disability income support system and the comparison of this Australian model with the Basic Income proposal. This historical and comparative analysis is developed within each of the two sections of the thesis (Part One and Part Two) and their component chapters. Part One deals with the Australian disability income support system and Part Two with Basic Income.

## **PART ONE: THE IDEOLOGY OF DISABLISM AND THE AUSTRALIAN DISABILITY INCOME SUPPORT SYSTEM**

*Chapter One: A social theory of disability and disability income support policy constructions* provides a theoretical discussion of historical and social constructions of disability in disability social policy literature, particularly in relation to income support policy. It reviews the traditional theories and social theory understandings of disability and contextualises them in relation to hegemonic material relations. The chapter gives an account of dominant disability discourse in order to establish the relevance of using an historical materialist framework for examining disability income support policy.

*Chapter Two: Disability income support policy in Australia: Contextualising historical debate in the 20<sup>th</sup> and 21<sup>st</sup> centuries* extends the theoretical framework underpinning the research outlined in Chapter One and traces the history of disability income support systems within Australia during the 20<sup>th</sup> and early 21<sup>st</sup> centuries from 1908 to 2007. It examines the wider body of literature on the Australian disability income support system and develops a critical historical review to draw out key themes. The historical examination includes an exploration of key concepts, such as citizenship, social participation, productivity, hegemony and solidarity. This extended theoretical framework is contextualised within the broader Australian targeted system of income support. This chapter conceptually scopes four main historically significant eras relevant to disability income support policy to establish the methodological justification of the approach. These historical time periods are the First Epoch (1908 to 1940): Development, enactment and implementation of the Commonwealth Invalid and Old-Age Pensions Act 1908; the Second Epoch (1941 to 1985): Significant changes to disability income support, following a period of stability in the Invalid Pension; the Third Epoch (1986 to 1995): Major policy shift led to changing the Invalid Pension to Disability Support Pension (1991); and the Fourth Epoch (1996 to 2007): Significant changes to the Disability Support Pension. The chapter also explores the concept of poverty and its relationship to disability income support policy.

*Chapter Three: The use of critical historical-comparative policy analysis methodology and critical discourse analysis method to explore disability income support.* The key insights emerging from the theoretical scoping undertaken in Chapter One and Chapter Two frame the methodological and analytical approach to the study. The research design strategy was informed by a guiding structure (Crotty, 2003) which provided justification for the ontological, epistemological, theoretical, methodological and method positions adopted in the study. The study draws on critical historical-comparative policy analysis methodology to discern historical patterns and compare the Australian disability income support system with the alternative Basic Income model. Critical discourse analysis as a method helped to identify the historical patterns and ideological dimensions underpinning the relevant policy documents associated with Australian disability income support policy and the alternative



Basic Income model. The research design, research methods and analysis approach are examined and outlined while ensuring the research logic aligns with the theoretical framework. The chapter details the development of a “textual corpus of data sources” (collection of policy documents) and how the textual data domain areas of policy, dominant media and alternative public discourse were used to guide the selection of texts for analysis. Finally, issues of research integrity, ethical issues and rigour are detailed.

*Introduction to Chapter Four and Chapter Five: Tracing the history of the Australian disability income support system, 1908 to 2007: The emergence of the disabled bludger construction* introduces the examination of the Australian disability income support system across the four major historical epochs. The introductory section also provides a brief introductory overview of the themes occurring across the four major historical epochs.

*Chapter Four and Chapter Five: Tracing the history of the Australian disability income support system, 1908 to 2007: The emergence of the disabled bludger construction.* Chapters Four and Five describe the findings from the analysis of the Australian disability income support system from 1908 to 2007. The historical constructions of the disability income support system within each epoch are analysed using the Disability Income Support Analytical Framework and the corresponding four major historical epochs. Chapter Four details the findings from Epochs One and Two. Chapter Five presents the findings from Epochs Three and Four. Within each epoch a descriptive chronology of events surrounding the enactment and administration of disability income support and the policy trajectory involving important periods of social change that impacted upon the disability income support system are provided. The chapters reveal the dominant themes that consistently feature in disability income support policy which, in turn, has perpetuated the ideology of disablism. They also expose the inherent problems with the current targeted model of Australian disability income support. Further, the chapters provide a discussion as to why disablism continues to be an inherent feature underpinning the Australian disability income support system and fails to be addressed by incoming governments. Chapter Five provides a concluding summary, which draws together the key insights emerging from the findings of both chapters and across each epoch.

## **PART TWO: THE POTENTIAL FOR A “BETTER WAY”? EXPLORING THE BASIC INCOME PROPOSAL**

*Chapter Six: Setting the scene. Social justice and the Basic Income model: Emerging insights and the relevance of the model for comparative analysis* comprises a review of the literature on the Basic Income model in relation to disability income support policy. It explores the relevance of Basic Income as an alternative to targeted approaches to disability income support. It briefly traces fundamental tenets underpinning a Basic Income model of income support, including current developments on the Australian and international levels.

The chapter also critically examines some of the historical basis of Basic Income alternatives, such as guaranteed minimum incomes proposed by Milner (1920), and positions the model's relevance as a useful comparison with the Australian disability income support system. Thus, the chapter provides a useful outline of the rationale underpinning the choice of Basic Income model against other possible alternatives, such as the "right to work" approach. Chapter Six also situates some of the written account of the initial analysis of Basic Income within the Australian context. This chapter sets the scene for the following chapter.

*Chapter Seven: Social citizenship, non-disablism and the Basic Income Proposal: A critical examination of the intellectual challenges surrounding Basic Income relative to disability income support policy* explores the Basic Income model in relation to the Australian disability income support system. Emerging from the examination of the Australian disability income support system was the need for analysing the Basic Income model to reveal the strengths and weaknesses of the policy approach. Using the four major historical epochs outlined previously and the Disability Income Support Analytical Framework, the chapter traces the history, key principles and policy objectives underpinning the Basic Income model compared with Australian disability income support. The same Disability Income Support Analytical Framework is applied to maintain logical consistency of the study.

*Chapter Eight: Conclusion: Future considerations for disability income support policy* brings together the findings from Chapters Four and Five and Chapter Seven to draw some tentative conclusions around the nature of the Australian disability income support system. The chapter expounds on the key conclusions drawn from the study and examines the implications for disability income support policy. The chapter makes recommendations for further research development. It contributes to extending the ideas in the proposal of an alternative income support model that promotes the social citizenship of people with a disability. An initial analysis of the Australian disability income support system yields some important features which point to the relevance of exploring an alternative model of income support. It is expected that the deeper level analysis presented in the thesis will draw out a comprehensive picture for future discussion.

#### **I.IV Chapter Conclusion: Situating the Study**

The Australian disability income support system is the safety net originally intended to prevent the consequence of poverty for people with a disability. A study of the Australian disability income support system is required in order to understand its history and the ideological dimensions that influence the provision of disability income support over time. Even when governments have the best intentions, there are always unintended consequences in disability income support policy. An in-depth exploration clarifies why it is that the current expression of targeted disability income support remains the dominant

model. This understanding helps to build the foundations for examining an alternative model (Basic Income) within policy spheres. Exploring the intellectual challenges central to these policy fields contributes to a better understanding of the way income support systems can promote or restrain the social citizenship of people with a disability. Clearly, such knowledge might help to build an alternative income support system were a government to become interested in taking such a course of action.



# **PART ONE**

## **THE IDEOLOGY OF DISABLISM AND THE AUSTRALIAN DISABILITY INCOME SUPPORT SYSTEM**



# **CHAPTER ONE**

## **A Social Theory of Disability and Disability Income Support Policy Constructions**

My own concern has always been to develop a theory that is policy-relevant. In particular, I have been concerned to promote policies that will address and tackle the institutionalized discrimination that is faced in the disabling society. (Oliver, 2009, p. 9)

### **1.1 Introduction**

The concept of disability in dominant policy responses reflects medical, individual and charitable assumptions. The construction of disability in disability income support policy has implications for people with a disability in terms of social citizenship. Where income support policies may espouse the language of fostering the citizenship of people with a disability, they may in effect operate counter-intuitively. This chapter presents insights into the historical and social constructions of disability in disability social policy literature, particularly in relation to income support policy.

Individual theories of disability and the counter movement (social model) understandings of disability are examined using the social theory of disability as a significant reference point. There is an emerging body of work on disability social theory and social policy discourse. These studies, such as P. Milner and Kelly's (2009), provide important insights into the disability construct in relation to social policy and citizenship. This chapter details the dominant disability discourse and establishes the relevance of using historical materialism for exploring disability income support policy. Included within the examination is the initial scoping of Gramsci's (1977) theory of hegemony in order to link disability and social policy. The discussion outlined in this chapter aims to draw out important theoretical insights toward the development of a coherent theoretical and analytical basis for the study. The disability construct is located in the context of income support policy. Particular attention is paid to the changing nature of key concepts, such as citizenship, social participation, productivity and solidarity.

### **1.2 Disability Constructions and Language**

The changing concept of disability and use of language require a specific mention at this point. The present study employs the concept "people first" and uses the term "people with a disability". Adopting the *people first* terminology in this study represents a shift away from the pejorative use of terms such as "subnormal", "invalid", "imbecile" and "idiot", historically embedded in Western industrial policies and practices. Currently, it is understood that the concepts ascribed to disability in the early parts of the 20<sup>th</sup> Century, such as invalid,

handicapped, mentally deficient, feeble-minded and mentally retarded are historically situated terms. However, the concepts were underpinned by ideological inferences that generated a devalued social status for people with a disability.

Differences in terminology existed across different countries. The *people first* perspective acknowledges that the Australian context represents but one socio-political landscape for examining disability from a social theory standpoint. However, the preferred term “disabled people” is employed in Britain by the disability rights movement and academics such as Barnes (2002, 2007) and Morris (1996). These disability theorists suggested that the term “disabled people” is used to reflect the social model approach. From this stance people are disabled by society and the term “people with a disability”, as Barnes (2002) and Morris (1996) stated, tend to align with the individual model in which a person has the disability. Yet, recent developments have challenged the simplistic division in disability language. Disability social theorists, such as Goggin and Newell (2005), Shakespeare (2006a) and C. Thomas (1999, 2002, 2004a, 2004b, 2007), agree that variation in the terminology occurs across the disability literature, and suggest the need for a socio-contextual awareness in the application of the terms.

### **Standpoint of people first: A personal commitment**

Adopting a *people first* stance aligns with the researcher’s own commitment to critical social science epistemology and disability social theory. The present study operates on the assumption that disability is taken to be a socio-political construct. That is, the causes of disability are social in nature, origin and expression. The researcher’s stance is in line with disability writers in Australia (such as Gibilisco, 2003; Gleeson, 1999; Goggin & Newell, 2005) who similarly use the position of *people with disabilities*. A critical approach, such as the one employed in the present study, recognises the power differentials and conflict between groups within society. The study grounds the argument in the notion that disability is a consequence of social oppression and structural inequities (Abberley, 1998).

In a similar vein to the works of Abberley (1987, 1998), Barnes and Mercer (2003), Gibilisco (2003, 2005), Gleeson (1999), Russell (2001a) and C. Thomas (1999, 2004a, 2004b, 2007), this study seeks to extend disability social theory by drawing on principles underpinning the critical approaches. From this stance, connections between dominant conceptualisations of disability can be linked to the social consequences of oppression and disadvantage. This is not to say that some form of impairment or disability condition is not experienced by people. Indeed, various authors (such as Hughes, 2009a, 2009b; Shakespeare, 2006b; Tremain, 2001, 2005; Turner, 1996, 2001, 2003; G. Williams, 1998, 2001) examine the connection between the social model and medical/biological models of disability in order to ontologically balance the tension between disability as oppression and disability in terms of “bodily difference”. Rather, from the social theory standpoint underpinning this study, disability



needs to be understood in terms of its social construction, cultural interpretation and material basis, as opposed to dominant individual-functional or charitable conceptualisations.

Regardless of the subtle intricacies between the terminology, each position (“people first” and “disabled people”) highlights the tendency for prevailing traditional “official” policy discourses to become instruments of power, which reinforce historically embedded stereotypes of disability (Barnes & Mercer, 2003; Oliver, 2009). As Barnes and Mercer (2003) noted, “in our view, widely used English words such as ‘cripple’, ‘spastic’ and ‘idiot’ have lost any semblance of ‘technical’ meaning and simply become terms of abuse or ridicule” (p. 17). Thus, the use of the “people first principle” within Australia and the present study reflects a commitment to counter the contrasting traditional dominant explanations of disability.

### **Disability constructions and disability studies**

Historically, the disability concept within sociological and social policy arenas tended to link the term to notions of illness or a deficit. While there is a range of conceptual examinations that frame disability theorising<sup>4</sup>, the dominant conceptualisations of disability centre on individual-functionalist, personal tragedy, bio-medical eugenicist and charity theories. The social model of disability challenged the prevailing understandings of disability. Disability social theorists, such as Abberley (1987), Barnes and Mercer (2004) and C. Thomas (1999, 2004a), suggest the need to develop a social theory of disability to guide the research and analysis of disability policy.

### **1.3 A Social Theory of Disability and Disability Policy**

Dominant responses to disability policy and practice have drawn heavily on the individual-functionalist, personal tragedy, bio-medical eugenicist and charity theories which produced connections between disability and deficit. The key reference point for analysis, policy direction and service provision was on individual pathos, that is, the perceived “deficiencies” and “dysfunctions” of a person (Abberley, 1987; Barnes, 1996, 2002; Barnes & Mercer, 2001, 2003, 2005; Gleeson, 1999; Peters, Gabel & Symeonidou, 2009). Barnes (1996, 2002) identified that the terminology contained within policy reflected the imposed norms of the dominant group in society in relation to people with a disability. As such, an individual-functionalist approach to understanding disability establishes disability as an individual deficiency. The concept of disability, hence, attained a “taken for granted” distinction in which disability became defined against established conventions of normalcy, illness and states of being (Abberley, 1987; Barnes 1996; Newell, 1999; Oliver, 2009; Peters et al., 2009; C.

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<sup>4</sup> Examples include naturalistic, biological and geneticist, anthropological or religious traditions examining conceptualisations of disability, as noted by a range of disability writers including Braddock and Parish (2001), Davis (2006a, 2006b), de Poy and Gilson (2004), Hughes (2009a, 2009b), Wilson (2006), and Shakespeare (2006a).

Thomas, 1999, 2004a, 2004b; G. Williams, 1998). Of interest to the present study is the way disability has been constructed in disability income support policy. This is particularly important in terms of discerning whether policy responses concerning Australian disability income support have drawn on deficit-based and charity theories to construct policy.

Disability social theorists<sup>5</sup> contested the dominant theories of disability and argued for the concept to be employed as a socio-structural construct which reflects the structural forms of oppression that people with a disability have experienced. Abberley (1987, 1998, 1999) and his earlier work on the nature of disability has provided a significant influence on the development of the social theory of disability. For Abberley (1998), the concept of disablism is juxtaposed with sexism and racism to embody the historical dimensions associated with the experience of disability. From this position, structural barriers prevented the participation of people with a disability in all aspects of social life. Thus, disability is a consequence of unequal social policies and practices which disadvantage people with a disability (Abberley, 1998). Disablism is reflected in exclusionary practices across varying levels of society, including socio-cultural, institutional, or interpersonal dimensions. This form of disablism operates to subordinate people on the basis of their impairment (Barnes & Mercer, 2003). Restrictions act to prevent people with a disability from engaging in the social life of the community and activities such as working (Barnes & Mercer, 2003). Similar major developments in the social theory of disability, critical to this study, can be identified in the works of Barnes and Mercer (2003), Morris (1991), Newell (1999), Oliver (1990, 1998, 2009) and C. Thomas (1999, 2004a) who provided critiques on the dominant explanations of disability and argued for the social construction of disability in research.

Relevant to the present study is the way society can be structured to reflect ideological forms of oppression, particularly in the entrenchment of disabling policies, practices and institutional arrangements. Disability from the social theory position is connected to capitalist society, whereby there is an “automatic devaluation” of an individual’s labour power on the basis of their impairment (Gibilisco, 2003, p. 139). The danger in over-emphasising disability as an individual deficit is that the explanations cover up the fact that the unequal structures generate distinctions between able-bodied and disabled groups.

Adopting the stance that disability can be defined as a social-relational phenomenon, Gleeson (1997), Oliver (1998, 2009) and C. Thomas (1999, 2004a, 2004b), argue for starting from a position that takes into account the material position of people with a disability within a specific capitalist epoch. The key conceptual link useful for the present study is the way the

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<sup>5</sup> A range of disability social theorists include, Abberley (1987, 1998), Barnes (1996, 1998, 2002), Barnes and Mercer (2001, 2003, 2005), Barnes, Oliver and Barton (2002), Barton (1994, 1998a, 1998b), Charlton (2006), Drake (2002), Finkelstein (1980), Gibilisco (2003), Gleeson (1999), Morris (1991, 1996), Oliver (1989, 1990, 1998, 2006, 2009), Priestley (1998), Russell (2001a), Shakespeare (1993, 1994), Sheldon (2009), C. Thomas (1999, 2004a, 2004b, 2007), Thomas and Corker (2002) and G. Williams (1998, 2001).

disability concept in social policy is connected to the prevailing ideologies and historical-material conditions of society.

### **The social model as a “heuristic device” for challenging oppressive disability policies**

The social model of disability is distinct from the social theory of disability. A social model of disability helps to situate disability within the broader social structures of society. From this basis, a historical-materialist perspective can be adopted to develop a social theory of disability concerning disability income support policy. Peters et al. (2009) suggest that the social model is a tool for raising awareness about the oppression of people with disabilities. They also highlight that the social model is action-oriented as opposed to a social theory. Barnes (2002), C. Thomas (2007) and Oliver (2009) point out that the social model represents a “heuristic device” for interpreting disability implications, yet it does not form a social theory of disability. Thus, a social theory is developed through the incorporation of historical and contextual dimensions for examining disability income support policy (Oliver, 2006).

The present study recognises that the social model has been criticised for inadequately explaining the gender and cultural dimensions of disability (Grech, 2009; Shakespeare, 2006b; Terzi, 2004; C. Thomas, 1999, 2004a, 2004b) and failing to consider its relevance for people with a mental illness and people who have an intellectual impairment (Chappell, 1998; Dewsbury, Clarke, Randall, Rouncefield & Sommerville, 2004; Gabel & Peters, 2004; Hughes, 2009). Other disability theorists (Corker & Shakespeare, 2002; Erevelles, 1996; Scott-Hill, 2002; Simmons, Blackmore & Bayliss, 2008; Tremain, 2001; Wilson & Beresford, 2002) have used post-modern and post-structural interpretations of the social model to move beyond dualisms which they believe have not been accounted for in the social model. Shakespeare (2006a) argues for a new model which he refers to as the interactionist model. He views the interactionist model as combining elements of both the social model and medical model. However, despite these criticisms, the social model does have relevance in terms of the distinctions it makes between the terms impairment and disability (Barnes, 1998; Oliver, 2009). As Barnes (1998) and Oliver (2009) assert, the connection between the myths produced in society surrounding bodily perfection and the “able-bodied ideal” with material forces in society help to understand the way the disability concept can operate to generate societal prejudice against people with disabilities.

The impairment/disability dichotomy remains important for disability researchers drawing on the social model. Impairment for Barnes (1998), and similarly for C. Thomas (1999, 2004a), is taken to be a social product, rather than a fixed essentialist state interpreted in terms of “inherent, abnormal and biological” attributes of the human body. Thus, impairment defined by the Disabled People’s International movement in 1982, and from a social model stance

refers to “the functional limitation within the individual caused by physical, mental or sensory impairment” (Barton, 1994, 1998a, 1998b; Morris, 1991, 1996; Oliver, 1990, 2009; C. Thomas, 1999, 2004a, 2004b; G. Williams, 1998, 2001). As C. Thomas (1999) explains:

The social model asserts that it is not the individual's impairment which causes disability ... and it is not the difficulty of individual functioning with ... impairment which generates the problems of disability. Rather, disability is the outcome of social arrangements which work to restrict the activities of people with impairments by placing *social barriers* [emphasis in original] in their way. (p. 14)

Oliver (2009) acknowledges that the social model of disability only goes so far in developing understandings of the disabling nature of society, whereas a social theory of disability helps to generate new theory. Yet, the utility of the social model of disability is in the action component whereby a proposal for an alternative to the traditional dominant disability income support policies can be put forward. From this stance, the social model of disability helped to politicise the concept and increase awareness of the struggles (both personal and political) experienced by people with a disability (Oliver, 2009). This helps the present research to undertake a materialist account of the social construction of disability in relation to Western industrial capitalist society and thus to generate a social theory of disability concerning disability income support policy (Gleeson, 1999; Joiner, 2006; Oliver, 2009; C. Thomas, 1999, 2004a, 2007).

### **Historical materialism**

Clear and Gleeson (2002), Oliver (2009), Russell (2001a, 2001b) and C. Thomas (1999, 2004a) provided a strong argument for using historical materialism in disability policy studies. To establish the position of historical materialism, Clear and Gleeson (2002) argue that focusing solely on ideology without considering material conditions of society does not account for the broader social forces that operate within society to marginalise people with a disability. They propose that historical materialism allows for sensitivity to the connections between socio-material conditions and ideological formations within society. As discussed in the previous section, the oppression of people with a disability is historically politically, materially and culturally contingent. Ableism, according to Clear and Gleeson (2002), becomes “a product of the material realities of capitalism, including its system of commodity of labour and its dominant cultural and discursive forms” (p. 42). From this position, the critical point is that the transformation of society from feudalism to capitalism has led to the labour potential of individuals being measured against norms of average productivity standards in conjunction with notions of worth (Clear & Gleeson, 2002; Gleeson, 1999; Oliver, 2009; Peters et al., 2009; C. Thomas, 1999, 2004a).

Historical materialism provides a conceptual approach useful in examining the representations of disability across different historical epochs and the relationship of these to

the means of production. Class analysis is a central concept for historical materialism, as it forms the starting point for theorising. The underpinning assumption contends that an individual's class position remains dependent upon their relationship to material and productive forces (Barbalet, 1983; Charlton, 2006; Lorimer, 1999; Mays, 2003; Podosetnik & Spirkin, n.d.; Shaw, 1983, p. 209; Singer, 1980; Worsley, 1990). Yet, historical materialism is more than purely a class analysis. Barnes and Mercer (2005), Clear and Gleeson (2002), Gibilisco (2003), Gleeson (1998, 1999), Gramsci (1977), Marston (2004); Russell (2001a, 2001b), C. Thomas (1999, 2004a, 2004b), and Torfing (2005) all state that rather than solely use a class analysis, other dimensions, such as disability, age and locality, are required to extend social policy. For Barnes and Mercer (2005) and Oliver (2009), a relevant social theory of disability applies historical materialism to situate the disability dimension within the context of the relationship of disability to the mode of production and the broader political economy.

Oliver (2009) recognised the role of the political economy in generating the category of disability. He argued that:

Political economy ... suggests that all phenomena (including social categories) are produced by the economic and social forces of capitalism itself.... Hence, the category disability is produced in the particular form it appears by these very economic and social forces.... The economy, through both the operation of the labour market and the social organization of work, plays a key role in producing the category disability and in determining societal responses to disabled people.  
(p. 91)

Yet, Oliver's (2009) work goes only so far in developing a social theory of disability that responds to disability income support policy. In order to extend on this further, the researcher turned to Gramsci's (1997) use of historical materialism to explore disability and hegemony.

### **Disability and Gramsci's (1977) theory of hegemony**

Gramsci's (1977) notion of hegemony is useful for examining the nature of disability within the context of disability income support policy. Disability theorists who applied the theory of hegemony, such as Gleeson (1999), Oliver (2009) and C. Thomas (1999, 2004a, 2004b), examined the assumptions surrounding the category "disability". Their ideas are highly useful for analysing the nature of social oppression for people with disability and the way hegemonic forces operate within society during specific historical epochs. Ideology in the present study is not used in a pejorative sense (Tomlinson, 2000a, 2000b). The study is not employing a pejorative conception of ideology. The concept of hegemony represents a relevant theoretical approach that captures the historical and material dimensions of disability income support policy (Fairclough, 2003, 2005, 2009; Månson, 2000, p. 131; Marston, 2004, p. 18; Mays, 2003, 2006). Of significance to the present study is Bocock's

(1986) assertion that for Gramsci “hegemony, when successfully achieved, is unnoticeable in everyday political, cultural and economic life” (p. 76).

Gramsci’s (1977) conception of hegemony has been instrumental in shaping the ideas surrounding the extension of what Gleeson (1999) and C. Thomas (1999, 2004a, 2007) refer to as the historical materialist understanding of disability. Gibilisco (2003), Gleeson (1999), Russell (2001a, 2006), Oliver (2009) and C. Thomas (1999, 2004a) stated that the theory of hegemony is required to produce transformation in the social theory of disability. These ideas have, thus, been central to this thesis. Disability theorists, such as Gibilisco (2003), Oliver (2009) and Russell (2001a), use the term hegemony in relation to disability oppression to facilitate an understanding of the interrelatedness of disability to the material conditions of society. These authors also acknowledged the role played by material conditions and discursive practices that led to people with a disability being excluded. Gibilisco (2003) further advances that the hegemonic forces, by promoting distinctions between “abled and disabled”, established ableism as the norm in society. Thus, in part, the purpose of this thesis is to examine the extent to which income support provisions created and reproduced particular policy positions containing ableist assumptions. Gramsci’s (1977) theory of hegemony is central to understanding the way that disability and social reality are constructed through processes of social policy and language.

A particular feature missing in contemporary policy research on disability income support (such as, Humpage, 2007) is not only historical patterns underpinning disability income support, but also the way in which ideological dimensions have influenced policy-making. This point is particularly noteworthy regarding the effects of social policy changes on those groups which become the target of policy changes, such as people with a disability reliant on income support. Bessant et al. (2006), Marston (2004), and Marston and C. McDonald (2008) concluded that traditional social policy analyses have tended to ignore the function of ideology in shaping disability policy.

Historical contradictions underpinning the Australian disability income support system have not been examined. The gaps in disability income support literature point to the need for a study that incorporates historical materialism and the concept of hegemony in analysing the nature of the Australian disability income support system.

### **Gramsci’s (1977) theory of hegemony, disability and media constructions**

Gramsci’s (1977) theory of hegemony is also a powerful tool for examining media and the construction of disability income support policy. Media, from Gramsci’s (1977) position, becomes a powerful tool in shaping public perceptions of disability. Barnes and Mercer (2003) suggested the “able-bodied” assumptions promoted categories of disabledness in disability income support policy and associated media representations. Barnes and Mercer

(2003) and L. Thomas (2001) found a connection between media representations and negative disability constructs. The power of imagery is drawn by disability theorists of the historical portrayals of disability in the media, including the *arts* (so-called “freak value” in festivals, circuses and village fairs) (Bogdan, 1996; Davis, 2006a, 2006b; Garland, 1995; Garland Thomson, 2009; Gerber 1996); *literature* (Battye, 1966; Snyder & Mitchell, 2001; Sontag, 1991), *newspaper, news and printed media* (Ciot & Hove, 2010; Haller, 2003; Radtke, 2003), *cinema, film and television* (Davidson, Woodill & Bredberg, 1994; Edgerton, Marsden & Nachbar (Eds.), 1997; Ellis, 2004; Longmore, 2004; Norden & Wolfson, 2000; Ross, 1997; Schwartz, Blue, McDonald, Giuliani, Weber, Seirup, Rose, Elkis-Albuhoff, Rosenfeld & Perkins, 2010; Strinati, 1995), and *advertising* (Hevey, 1992; Meekosha & Dowse, 1997). Notably, the findings of these disability studies highlighted the prejudicial and distorted representations of disability in these media. Representations identified included *charity notions, personal tragedy, objects of pity or ridicule* (as in “super cripple”, “crippling images”, “wonder cures”), *romanticisation, medicalisation* (“corporeal deviants”, maladjusted, invisible, saintly or asexual), or *wound/monstrous/abject constructions* (Barnes & Mercer, 2003; Hughes, 2009b). These depictions are highly concerning given the propensity for media to generate distinctions of normalcy based on able-bodied ideals.

While some disability studies explicitly draw on textual analysis to examine films (for example Darke, 1994 and Ellis, 2004), few studies specifically explore disability representations contained in printed news and radio media around disability income support policies. The increased interaction between governments and media in promoting particular policy stances requires further examination. This point has particular relevance in the exploration of disability income support policy given the role that social policy has in shaping and informing public opinion (Connor, 2007; Hall, 1997a, 1997b, 2005; Hall, Critcher, Jefferson, Clarke & Roberts, 1978; Hall, Jefferson, Clarke & Roberts, 2006; Iyengar & Kinder, 1987; Iyengar & Valentino, 2000; Larsen, 2006; Schudson & Waisbord, 2005). Where disability theorists, such as Quibell (2004), do analyse constructions of disability in policy and the media, they have not necessarily explored the arena of disability income support within Australia, particularly over time. Barnes and Mercer (2003) pointed out that hegemonic media constructions of disability through written reports of disability income support policy can perpetuate marginalising imagery of people with a disability. Clearly, when researching disability income support policy, analysing media articles as well as disability income support policy is required. Given these considerations, this study will incorporate an analysis of media (printed news and radio) relating to disability income support policy. Exploring media discourses helps to understand the meaning-making role of media in producing particular disability constructions and the way hegemonic ideas can shape policy direction and public opinion (Schudson & Waisbord, 2005).

## **Historical materialism, social citizenship and disability policy**

The foundations of citizenship and the understandings surrounding the notion of citizenship are important to this study on disability income support policy. As Barnes and Mercer (2003) and Oliver (2009) point out, social citizenship is fundamental to disability social theory in terms of arguing for an egalitarian approach to disability policy. Perhaps the most influential writer concerning social policy has been T. H. Marshall (1950 cited in Marshall & Bottomore, 1992) and his original conception of the term: citizenship. Marshall (1950) argues that “citizenship is a status bestowed on those who are full members of a community. All who possess the status are equal with respect to the rights and duties with which the status is endowed” (p.28). Incorporated within this explanation were the civil, political and social rights, which for Marshall remained critical to the advancement of democratic society.

Although Marshall’s (1992, 2000) conceptualisation of citizenship provides a foundation for exploring disability income support policy, it is the later works by disability social theorists, such as Barnes and Mercer (2003), Beckett (2006a, 2006b), Duffy (2006), Gleeson (1999), P. Milner and Kelly (2009), Lister (2004, 2008) and Morris (2005), who generate a platform for using the concept of citizenship. Social citizenship is used in this study to mean an egalitarian society that promotes the social justice, solidarity and contribution of people with a disability in all aspects of life. For people with a disability to enjoy social citizenship, collective redistributive mechanisms must be provided for them to exercise these rights. The idea of a collective redistributive mechanism has important implications for this study in the examination of existing and relevant alternative disability income support policy models.

Barnes and Mercer (2003), Beckett (2006a, 2006b), and Morris (2005) note the different uses of citizenship and participation concepts in different disability income support policies, whereby the concepts can operate counter to the social model’s aims. From the liberal notion of citizenship, an active citizen is one who is self-reliant and therefore self-supporting. Morris (2005) pointed out that the danger in promoting active citizenship is the tendency for the state to pull back on the provision of funding, which in turn, leads to increased pressure on informal supports. Barnes and Mercer (2003) argued for extending social policy by using a historical materialism perspective. For Barnes and Mercer, incorporating the concept of social citizenship into disability policy research helps to prevent the marginalisation of people with a disability.

Abberley (1999, 2002, 2006), Barnes and Mercer (2005) and Oliver (2009) highlight that the application of historical materialism would situate disability at the forefront of social policy, particularly disability income support policy. The use of historical materialism would assist in generating a social theory of disability for an egalitarian disability income support policy. As Abberley (2002) contends, “we need to develop theoretical perspectives that express the standpoint of disabled people, whose interests are not necessarily served by the standpoints



of other social groups, dominant or themselves oppressed, of which disabled people are also members” (p. 136). Barnes and Mercer (2005) captured the crux of Abberley’s (2002) argument towards enhancing the social citizenship of people with a disability through social policy. In summing up Abberley’s (2002) ideas, Barnes and Mercer (2005) found that “existing social theories do not provide an appropriate framework for the development of policies that will give disabled people equity in terms of either paid employment or living standards” (p. 533). Such a position allows for situating disability conceptions within the context of social policy analyses (Barnes & Mercer, 2005).

#### **1.4 Modernity and Post-Modernity: Implications for Disability Policy**

In developing a social theory of disability useful for examining disability income support policy, as discussed in the previous section, the researcher draws on historical materialism based on the works of disability social theorists and Gramsci’s (1977) theory of hegemony. Thus, Foucauldian (2000) and other post-modern and post-structuralist perspectives will not be used in the present study. This is not to say that post-modernist and post-structuralist discourse approaches, particularly those studies drawing on the works of Foucault, have not made important contributions to the existing body of knowledge on disability social policy.<sup>6</sup> For example, Simmons et al. (2008) provide a post-modern approach to extend disability studies and special education practice, using two contrasting theoretical perspectives (Deluzo-Guattarian ontology and Bourdieusian analysis). This study acknowledges the contribution made by post-modern and/or post-structural discourse analyses of policy. However, for the purpose of this study, historical materialism in the classical tradition of modernity reflects the most appropriate approach to examining disability income support policy. The proposed approach for the study helps to uphold the universalities central to inclusive disability policy responses rather than to over-extend the diversity principle.

P. Atkinson and Delamont (2005) stated that “it is important to avoid reductionist views that treat one type of ... approach to analysis as being the prime source of social or cultural interpretation” (p. 822). Thus, a modernist approach to this study can provide the theoretical basis for analysing disability income support policy across different time periods. Social theory involves “perpetually searching for new and interconnected ways of understanding power and oppression and the ways they shape everyday life and human experience” (Kincheloe & McLaren, 2005, p. 306). This thesis, by drawing together theoretical insights from historical materialism and Gramsci’s (1977) theory of hegemony, denotes an alignment with modernist perspectives as the most relevant approach to examining the Australian

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<sup>6</sup> Disability modernist and post-modernist theorists such as, Corker and French (1999), Corker and Shakespeare (2002), Davis (2006a, 2006b), Fulcher (1989), Lupton (1995), Meekosha (1998), Morris (1991), Munford and Sullivan (1997), Quibell (2004), and Yeatman (1990), have advanced our understanding of the interrelationship between disability as a construct and discourse. Most notably, Quibell (2004) applied a Foucauldian post-structural framework in her study on intellectual disability policy discourse and media constructions in service contexts.

disability income support system and comparing these with an alternative model (Basic Income).

Taylor-Gooby (1993) noted that, if not treated carefully, post-modern stances can operate as an “ideological smokescreen” (p. i) whereby the “language of particularism and diversity ... may obscure ... reversals for the most vulnerable groups in a cloud of detail [and could] ignore the wood through enthusiasm for bark-rubbing” (p. 3). This study, by adopting a modernist application, seeks to reduce the propensity for what Taylor-Gooby (1993) calls the “ideological smokescreen” tendency found in some post-modernist and post-structuralist analyses. The value of the modernist standpoint underpinning this study is in the way it provides critical insight into the historical, social and political dimensions of Australian disability income support social policy (Bessant et al., 2006; Thompson, 2003).

Disability studies have been subject to similar post-modern and post-structuralist analysis. Simmons et al. (2008) and Shakespeare and Watson (2001) promoted the use of post-modern approaches to analyse the social aspect of disability, rather than draw on the social model. Shakespeare and Watson (2001) considered the social model to be “outdated” given its emphasis on the binary distinctions between impairment and disability. For Shakespeare and Watson (2001), the binary distinctions reduce disability to a biological determinism. Therefore, to redress the gaps in the social model, they proposed that disability is a part of the social aspect of impairment. Oliver (2009), however, regarded the post-modern and post-structuralist projects as “hav[ing] failed to provide any socially useful knowledge or insights that could be used in improving policy or service development for disabled people and their [post-modern] emancipatory potential remains shrouded in the mists of their own verbiage” (p. 9). Oliver advanced that the distinction between disability and impairment is highly relevant for understanding the disabling nature of society. C. Thomas (2004a) argued for the extension of the social model through social-relational understandings to develop a social theory of disability incorporating historical materialist understandings. As C. Thomas recognised, the social model of disability on its own does not constitute a social theory of disability. She argued for a social theory of disability from a modernist approach, given that:

A social relational understanding of disability offers fertile ground for theoretical, empirical, and policy-related work in disability studies.... It is in this direction that we should be travelling. A direction that takes us away from fruitless debates ensnared in ‘restricted activity’ definitions of disability and hooked up in supposed pros and cons of the social model of disability. (p. 581)

The points made by Oliver (2009) and C. Thomas (2004a) suggested the need for a modernist approach to developing a social theory of disability in relation to examining disability income support policy. It is these connections between research on disability

income support and the use of the social theory of disability grounded in historical materialism that is particularly fitting for this study.

### **The disability concept, employment participation and individual capacity**

Income support policy researchers (such as Grover & Piggott, 2005; Humpage, 2007, 2008) often explore the nature of employment in relation to disability. The central feature of their research is the connection between employment participation and individual capacity. That is, there is a clear distinction between those persons who are considered able to contribute productively and those persons who are considered unable to contribute productively.

In his previous works, Oliver (1998) alluded to the power of the disability dimension and the connection to notions of productive capacity and the political by noting that:

It seemed fairly clear that the mode of production played a crucial role in that with the rise of capitalism and the coming of individualised wage labour in factories, impaired people were at a severe disadvantage.... Impaired people became a particular problem ... because ... [they] could not be integrated into the workforce [and] they still had to be controlled. (p. 28)

Gleeson (1997) and Oliver (2009) highlighted the role of capitalism during the change from feudalism in generating a specific expression of disability where disability became tied to productive power and so-called 'ability'. This is not to say that the notion of disability did not solely manifest with the advent of capitalist society. Research into the disability construct during feudal society, medieval society and early Graeco-Roman periods have been comprehensively conducted by disability writers, such as Barnes, Mercer and Shakespeare (1999), Bragg (1997), Edwards (1997), Eyler (2010), Fiedler (1978), Gianfalla (2010), Gleeson (1997) and C. Thomas (1999). These writers pointed to the concept of disability in terms of religious conceptions, 'freaks' and personal tragedy.

Relevant to this study, however, is Gleeson's (1997) and Oliver's (1998, 2009) assertion that the emergence of capitalism and the relegation of people with a disability to institutions paralleled the legitimization of the power and authority of the medical profession. Oliver (2009) viewed this as a perpetuation of notions of deserving and undeserving persons. Classifications of people with an impairment became associated with those who "can't work" and those "who won't" (Mays, 2003). Thus, people with an impairment were labelled as a "sick invalid" and then relegated to institutions. C. Thomas (1999, 2004a) emphasised this position by acknowledging that Oliver's (2009) analysis "does suggest that the social oppression of those identified as impaired by those identified as non-impaired in capitalist society might have at its sustaining foundation their disadvantaged position in, and material exclusion from, material production" (p. 130).

A case in point is found in the work of Szasz (1970) who examined the treatment of people with a mental illness in the United States of America and Russia. By drawing distinctions between the United States of America and Russia, Szasz (1970) explored the different ideology underpinning the way mental illness was conceptualised in social policy. Understanding the point made by Szasz (1970) helps to discern the different approaches to disability income support policy and the way disability has been constructed over time. Szasz looked at the way each country treated the construction of the category mental illness and whether there was a connection to disablism (Mays, 2003). One of the key themes emerging from Szasz's (1970) study relevant to this thesis is the way constructions of disability across different contexts can operate either to support people with a mental illness or, in contrast, to subjugate them. For instance, Australian social policy theorists Argyrous and Neale (2000, 2003) drew distinctions between the "disabled" (medical and socio-economic concept) and "labour market disabled" (disability status tied to the labour market) in their arguments to support the need for addressing macro-economic structural unemployment.

Argyrous and Neale (2000) examined the connection between high rates of unemployment of people with a disability, and the limited access to the labour market of people with a disability. In exploring the participation rates of people with a disability in the labour market and recipient rates of the Disability Support Pension, Argyrous and Neale questioned the "validity of official unemployment rates and policies" (p. 14). They argued that these rates are reactionary to the government's fiscal policies and inflation targets as "one of the most important signals of the economy's tendency to 'overheat' is the official rate of unemployment" (p. 14). This problem, they suggested, was a result of the conceptualisation of labour force participation and its reliance on "neoclassical preconceptions" involving labour market participation (p. 14). For example, determinations of labour market status for people with a disability are tied to individual deficiencies. McAli (2006) explores the implications of the Australian welfare-to-work policies (under the Howard Government) for people with a disability. For McAli, the focus was on examining the changing nature of employment policy and identifying strategies to the pathway of people with a disability into the workforce. Other Australian social policy writers, such as Binstead, Banks, de Lautour and Lim (1997), Connor, Gordon, Banks and Saunders (1997, [SPRC]), English (1995), Marchant (1995), Poulton and Creed (1995), Watson, Holzl and Galzebrook (1995) and Winter and Charlesworth (1997), examine the participation of people with a disability in labour market programs and employment during the 1990s. These analyses tended to rely on micro-level explanations of labour market participation of people with a disability who were in receipt of the Disability Support Pension.

These studies above inform the thesis insofar as generating understandings of the connection between disability income support policies and employment policies. Yet, substantive historical analyses of the Australian disability income support system and

comparison with an alternative model, such as the Basic Income proposal have not been studied in detail. Few studies within the Australian context have highlighted the implications of ideological constructions surrounding disability in relation to income support policy. These gaps in the literature suggested the need for studying an appropriate income support system for people with a disability to extend the existing body of knowledge. Further examination is required of the patterns of changes over time in relation to the Australian disability income support and the underlying ideological assumptions surrounding these changes. Clearly, such an examination would assist in identifying a universal model of income support for people with a disability.

## **1.5 Disability and Income Support Policy**

Increasingly, on the international context, there is a growing body of literature<sup>7</sup> related to the relationship among the disability concept and social policy. For example, Coudroglou and Poole (1984) examined the issue of income support for people with a disability from the United States perspective. They compared the American model with British and Swedish models to identify key aspects of income support systems and social policy implications. Hedlund (2000) examines the construction of disability in Swedish income support systems. Hedlund identifies tensions between the social and biological conceptualisations of disability within Swedish social security programs. Hedlund's work is useful in understanding some of the language constructions underpinning disability income support policy. Yet, further research would generate deeper insights into the ideological basis of specific income support systems.

Schneider, Simons and Everatt (2001) placed greater emphasis on examining the British context of the National Minimum Wage in terms of the implications for people with a disability. They suggested that further changes to the income support system were required to address issues such as employment needs, imposition of work incentives and productivity entry requirements affecting people with a disability. Priestley (2000) and Priestley, Riddell, Jolly, Pearson, Williams, Barnes et al. (2010) explore the connection between the medical model of disability, social policy development for people with a disability, and their experience of marginalisation. However, Priestley and Priestley et al. (2010) examine these features from the context of British social policy development and cited a brief mention of New Labour's "guarantees of a minimum disability income" and the abolition of the "all work test" replaced by "new employability test". Priestley (2000), Priestley et al. (2010) and Schneider et al. (2001) examine the connection between disability, income support and work, particularly in terms of productivity.

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<sup>7</sup> For example, Abberley (1998, 1999), Barnes (1996, 1998, 2002), Barnes and Mercer (2001, 2003, 2005), Barnes et al. (2001), Bernell (2003), Borsay (2005), Oliver (2009), Priestley (2000), Rummery (2002), Scott-Hill (2002), Shakespeare (2006a), Thomas and Corker (2002), Tremain (2001) and Young (1990, 2000).

Australian social policy theorists, such as Cook (2004), Galvin (2004), Gleeson (1997, 1999), Jordan (1984), Kennedy (1984), Kewley (1980), Mendelsohn (1979), Mendes (2003, 2005, 2008), Sherry (2002), Smyth (1994) and Whiteford and Angement (2001, 2002), have gone some way in tracing the history of the Australian income support system. Recent studies on disability income support policy, by Burrows (2005), Daniels (2004, 2006) and Humpage (2007) have, in part, attempted to address gaps in current understandings of Australian disability policy. However, additional research is required to extend the knowledge of disability income support, particularly given that few studies specifically focus on the policy developments and subsequent effects of the ideology underpinning the Australian disability income support system.

Jordan (1984) and Kewley (1980) traced the historical developments of Australian disability income support in relation to other income support systems. The value of Jordan's (1900-1984) and Kewley's (1900-1975) work for this thesis lies in their detailed descriptive account of the legislative, policy and programmatic developments. Yet Jordan and Kewley did not undertake a thorough analysis of the ideological dimensions influencing the Australian disability income support system. From the findings of Jordan (1984) and Kewley (1980), a range of questions emerged, which need further research. Jordan (1984) provided a series of alternative approaches, one of which incorporated a guaranteed minimum income. Kewley (1980) recommended a deeper analysis of Australian disability income support to allow for understanding the philosophy underpinning the development of disability income support policy. Such a study would go some way to understanding the way particular models of income support remain dominant over time.

Subsequent research developments on disability income support (for example, Burrows, 2005; Cook, 2004; Daniels, 2004, 2005; Humpage, 2007, 2008; Quibell, 2004) remain somewhat fragmented and concentrate upon broader contextual features or socio-legal-economic dimensions. Further, these studies capture snapshots in time. This can be seen in the works of Burrows (2005), Cook (2004) and Humpage (2007). Burrows (2005) adopts a socio-legal (justice) position, to examine the historical changes in the Australian income support for people with disabilities, from 1945 to 2004. In focusing on the historical transformations and contemporary changes impacting upon disability income support provision, Burrows (2005) and Cook (2004) both neglect the ideological implications inherent in social policy underpinning the Australian disability income support provision.

Humpage (2007) explores the Disability Support Pension changes during the time of the Howard Government (1996-2007). Yet, to date no comprehensive tracing over a 100-year timeframe of the Australian disability income support system has been attempted. Even fewer theorists have developed a distinctive disability policy analysis incorporating an in-depth exploration of the ideological tenets underpinning the Australian disability income

support system. Thus, such a study would go some way to addressing the implications for disability income support concerning the tensions between dominant models with traditional ideological bases and possible alternative universal models.

## **1.6 Chapter Conclusion**

In this chapter, the concept of disability has been established in terms of *disability as oppression* based on the earlier works of Abberley (1987) and later works of Barnes and Mercer (2003) and Oliver (2009). It has been argued that the notion of disability as oppression aligns with historical materialism for developing a social theory of disability and Gramsci's (1977) theory of hegemony to understand the nature of disability income support policy. Close alignment with the historical treatment of the disability category provides insight into the way disability is constructed within disability income support policy. To date, studies have not explored the historical and ideological dimensions of disability income support policy, particularly in relation to Australia. The social theory of disability based on historical materialism and Gramsci's (1977) theory of hegemony will be used in the present study to examine the Australian disability income support system and an alternative.

Thus, historical and ideological dimensions shaped the Australian disability income support system. This study is interested in the way in which ideology and language interconnect to maintain dominant responses to disability income support policy. The next chapter (Chapter Two) explores in greater detail the history of the Australian disability income support system and develops the central rationale for the approach of this thesis.





## **CHAPTER TWO**

### **Disability Income Support Policy in Australia: Contextualising Historical Debate in the 20<sup>th</sup> and 21<sup>st</sup> Centuries**

Given the importance of keeping inequality down, we need to find ways of ensuring that greater equality is more deeply rooted in the fabric of our societies and less vulnerable to the whim of successive governments. We need to address the concentrations of power at the heart of economic life. (Wilkinson & Pickett, 2009, p. 248)

#### **2.1 Introduction**

The connection between the disability concept and oppression is important for this study, as disability is situated in the context of a political economy of the welfare state which generates the income support policies that can marginalise people with a disability. The previous chapter on a social theory of disability and disability income support policy constructions provided a brief scoping of the theoretical framework underpinning the research. This chapter further develops the theoretical framework by contextualising disability within the Australian income support system during the 20<sup>th</sup> and early 21<sup>st</sup> centuries from 1908 to 2007. Such an exploration of historical features provides a foundation for examining emerging themes associated with disability income support policy. Within this 100-year time period, four major historical epochs relevant to Australian disability income support are identified. Defining historical epochs provides a basis for the methodological approach and primary documents used for analysis. The chapter also includes an exploration of the notion of poverty and its relationship to disability income support policy.

#### **2.2 Foundations of the Australian Income Support System**

Historically, the Australian welfare state emerged as a response to address social and economic disadvantage for people experiencing poverty (Kennett, 2001; Taphouse, 2001). The Australian welfare state is, and has always been, situated within the context of a capitalist political economy. The welfare state remains a key structure for organising and delivering the social policy and programmes designed to promote the welfare of people (Goodin et al., 2000; Marston & C. McDonald, 2008; C. McDonald & Marston, 2005). Philanthropic and charitable systems sought to provide assistance to the “most needy” persons in society, such as people classified as widows, the poor, single mothers, the aged, and the infirm or incapacitated (Taphouse, 2001). Consequently, charitable welfare relief focussed on establishing definitions, which rewarded appropriate types of behaviour and specific circumstances, as a means of determining the eligibility and entitlement of those persons receiving welfare assistance.

Parallel to charity-based welfare relief, from the 1900s, an increased role by the government in power occurred in the planning and implementing of specific social policy responses (via income support) to address poverty and disadvantage. Kennett (2001, p. 120) points out that the focus of the Australian welfare state was on the provision of “minimum income security” through means-tested and targeted pensions, for those people most in need, as opposed to a universal income support system. Thus, as C. McDonald and Marston (2005) argue, the political economy of the welfare state within Australia comprises a residualist approach to welfare provision, in that it is highly targeted and excludes those persons deemed to be outside approved criteria (Blaxter, 1976; Kennett, 2001; Taphouse, 2001). These ideological distinctions require further examination to determine the way in which the targeted Australian disability income support model became the dominant approach.

### **Legacy of the English Poor Laws relative to Australian disability income support policy**

The Australian model of welfare distribution was, in effect, a reflection of the English Poor Laws of the 1800s, which similarly established conservative notions of eligibility for assistance for those people deemed to be in “need” of poverty alleviation (Blaxter, 1976; Evans, 1978; Stretton, 1996; Taphouse, 2001; Tomlinson, 2000a). The English Poor Laws of the 1800s (Victorian era) defined people in terms of their capacity to participate in the labour market. Earlier manifestations of the Poor Laws of the 1600s sought to assist those persons who were not working “through no fault of their own” (Geremek, 1994, p. 889). This clause denoted the concern for welfare provision only to the deserving poor. Adopting conservative notions of “worthy and unworthy”, social policies that sought to address poverty contained assumptions that unemployment and destitution were consequences of an individual’s “shortcomings and moral failings” (such as, “idleness”), rather than resulting from unequal structural conditions (Blaxter, 1976; Evans, 1978; Stretton, 1996; Taphouse, 2001). The important point for the present study is in the examination of the ideological dimensions of the Australian disability income support system and the connections to the assumptions underpinning the English Poor Laws of the 1600s and 1800s.

Issues surrounding the assumption of idleness are recorded in de Gerando’s (On Public Charity, 1839) work (Cited in Goodin, 2001). The assumption of idleness is drawn out in the expectation that able-bodied citizens would not remain idle. de Gerando (Cited in Goodin, 2001) explained that:

When an able-bodied pauper is not employed, or when he [*sic*] is not employed to his full capacity, he [*sic*] must be given help in the form of work, and only in that form.... If society must assist the unfortunate, it owes nothing to the idle. The pauper who refuses work he [*sic*] is able to do, when that work is offered to him, has no right to receive as aid what he could have derived from his labour.

Not only does he then have no right to be helped, but all other aid must be refused him. (p. 189)

The above excerpt captured the distinction between able-bodied and disabled, and its strong relationship to productive and non productive citizens. Also highlighted is the inference that policies should embed incentives to prevent idleness. As noted in Chapter One, de Gurando's stance operates in direct contrast to the social model of disability, which purported that the disability concept is tied to the capitalist mode of production. Capitalism advances through the generation of social forces that promote the principles of a societal system based on increased competition, individualisation and monopolisation (Argyrous & Neale, 2000; Gleeson, 1998; Oliver, 1998; Russell, 2001a). Galvin (2004) points out that part of developing a social theory of disability involves acknowledging this link between historical understandings and contemporary conceptualisations of disability and work. Where the social model of disability is useful for raising awareness of the connections, it is this social theory of disability standpoint adopted in the present study which assists in the examination of disability income support policy, as outlined in the previous chapter.

The critical point for this study is the way that work is organised around the principles of profit maximisation, and leads to the exclusion of specific groups from the labour market, particularly people with disability. Oliver (2009) contends that broader social policy research has been unsuccessful in embracing the disability dimension and the historical material understandings of the way disability is situated within society. He argued that historical social research "failed to provide information that has been useful to the policy-making process and has contributed little in improving the material conditions under which disabled people live" (p. 108). Oliver supports the need in social research to develop a social theory of disability that accounts for historical materialism and the hegemony of disability in relation to disability income support policy.

With this backdrop, the discussion alludes to the need for some form of income support policy for people with a disability who have historically been excluded from the labour market. However, the points raised in this section also demonstrate the need to examine the ideological underpinnings of disability income support policy. The historical basis of the Australian disability income support system situated within the broader political economy of the welfare state remains an important feature that is central to this thesis. An initial exploration of the Australian disability income support system provides a basis for framing the critical examination of disability income support policy.

### **2.3 Broad Overview of the Australian Disability Income Support System**

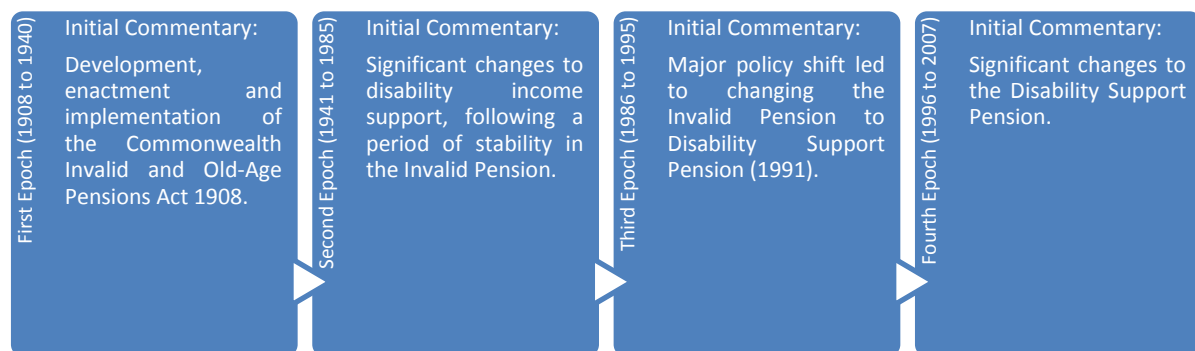
Four historical periods from 1908 to 2007 were identified to generate a snapshot of significant points in time. Scoping four historical eras assists in refining this study. Harris

(2008) recognises that during particular eras there are competing ideas and discourses. However, the snapshots often reveal the dominant hegemonic discourses. He referred to this process as “conjunctural settlement” in which there is “a combination of events and ideas in which the interests represented by different discourses are subordinated by a specific configuration of dominant discourses [and ideas] for a period of time” (p. 663). Thus scoping major historical eras helps to identify “historical moments” and reveal the implications of policy changes (Harris, 2008, p. 663).

### Major historical eras relevant to Australian disability income support policy

Table 1 (below) provides an overview of these key periods of time and initial emerging commentary. The four major historical eras have been chosen because each era reflects a particular policy change and specific discourse significant to disability income support policy (Harris, 2008). For the First Epoch (1908 to 1940) the debates reflected developments surrounding the Commonwealth Invalid and Old-Age Pensions Act 1908. The Second Epoch (1941 to 1985) captures legislative, policy and administrative changes to disability income support policy following a period of relative stability in the Invalid Pension. The Third Epoch (1986 to 1995) reflects changes from the Invalid Pension to the Disability Support Pension in 1991. The Fourth Epoch (1996 to 2007) represents a time of significant changes to the Disability Support Pension in line with broader government of the day policy.

**Table 1 Key Time Periods and Emerging Themes**



Further development and refinement of the time periods occurred during the research process (these developments can be seen in Chapter Three).

#### **First Epoch (1908 to 1940): Development, enactment and implementation of the Commonwealth Invalid and Old-Age Pensions Act 1908**

The key features of the First Epoch centred on the development, enactment and implementation of the Commonwealth Invalid and Old-Age Pensions Act 1908 and the non-contributory nature of the provision. The Commonwealth Invalid and Old-Age Pensions Act 1908 was designed to provide people with a disability and older persons with an income

maintenance benefit (Beresford, 1996; Daniels, 2004, 2006). Several policy analysts (Daniels, 2004; Kennett, 2001) have noted that the Commonwealth Invalid and Old-Age Pensions Act 1908 reflected a historically relevant form of income support, given that the provision was non-contributory. Although social policy writers have explored the relevance of disability income support, further examination is necessary to extrapolate the ideological assumptions underpinning the Australian disability income support system.

### **Second Epoch (1941 to 1985): Significant changes to disability income support, following a period of stability in the Invalid Pension**

The Second Epoch featured expansionism in relation to social policy during the early parts of the epoch, and changing government ideology regarding income support policy by the late 1970s due to the influence of global forces. The period between 1941 and 1985 has been explored by numerous policy commentators (Mendes, 2005, 2008; Saunders, 1999, [SPRC]; Tomlinson, 2000a, 2000b, 2001a, 2001b, 2004). However, their discussions have captured the broader income support policy context, rather than specific disability income support policy. Tomlinson (2004), for example, examined the implications of income support policy in relation to the post-Second World War period, in which governments of the day were committed to increasing the safety net. Mendes (2005, 2008) made a similar point by outlining the safety net features of income support policy. Mendes (2008) noted that governments were concerned with producing a strong economy to support the expansion process.

Similar transformations to broader social policies that impacted upon disability income support policy were encountered on the global level. The changes to income support within Australia occurred in response to broader prevailing structural changes on an international level, such as deregulation of finance and trade, increased globalisation of financial markets and increased international competition (Bill, Cowling, Mitchell & Quirk, 2004; Boreham, Dow & Leet, 1999; Langmore & Quiggin, 1994; Stilwell, 1994, 2002; M. Western, Baxter, Pakulski, Tranter, J. Western, van Egmond, Chesters, Hosking, O'Flaherty & van Gellecum, 2007; Wheelwright, 1994). For the present study of disability income support policy, these policy changes, such as the emphasis on strong economy, represent an important consideration in terms of the way in which particular ideological approaches transform and become entrenched policy. It is the ideological dimensions that require deeper "below-the-surface" exploration to draw out potential consequences of disability income support policy changes.

### **Third Epoch (1986 to 1995): Major policy shift leading to changing the Invalid Pension to the Disability Support Pension (1991)**

The Third Epoch incorporated the key features of changing the Invalid Pension to the Disability Support Pension (1991) and increased acknowledgement of disability rights in disability income support policy. Policy analyst Cook (2004) states that the broader

transformational changes on the international arena significantly influenced disability income support policy. She notes that the transition generated changes to the eligibility for disability income support. The broader transformations impacting upon disability income support policy occurred simultaneously with the shift toward emphasising the participation of people with a disability in society (particularly during the de-institutionalisation process). However, parallel to the broader structural policy changes, the disability social movement advocated for the recognition of disability rights (Galvin, 2004; Quibell, 2004). From a disability rights stance, the notion of “invalid” was considered outdated and pejorative. The implications of the changes to the Invalid Pension through the introduction of The Disability Support Package Legislation in 1991 (Argyrous & Neale, 2000, 2003; Beresford, 1996; Daniels, 2004; Howe & Burbidge, 2005; Kennett, 2001; Sherry, 2002; Stretton, 1996) requires further exploration in order to reveal the ideological tensions between these differing income support policy positions.

#### **Fourth Epoch (1996 to 2007): Significant changes to the Disability Support Pension**

The Fourth Epoch featured additional changes to disability income support policy with a greater emphasis on moving from macro policy responses to micro-level responses. Policy analyst Tomlinson (2000a) reports that, in a similar vein to the previous era, the recommendations for disability income support changes contained within policy documents were consistent with broader global socio-economic trends. Changes to accountability measures and improving the effectiveness of income support systems were similarly being adopted in other Western industrial countries, such as the United States of America and the United Kingdom (Bloch, 2008; Goodin, 1988, 1992, 2001, 2002; Goodin et al., 2000; Henman & Perry, 2002; Paz-Fuchs, 2007; Stretton, 1996; Tomlinson, 2000a; M. Western et al., 2005). Moses and Sharples (2000) and Schooneveldt (2004) found that the ideology behind the government response to changing income support did not necessarily reflect the reality of people’s lives. These authors, along with Humpage (2007), examined the compliance requirements central to income support policy and the impact upon income support recipients (McClelland, 2002; Moses & Sharples, 2000; Schooneveldt, 2004). M. Western et al. (2007) identified significant changes in government policy responses to income support during this era. Thus, given that policy justifications take on ideological nuances, some further analysis of the assumptions becomes paramount in understanding the implications for people with a disability in receipt of disability income support.

#### **Comment**

The implications of the changes to the Australian disability income support system over time form the basis for the analysis underpinning this study. Clearly, historical changes to, and the associated ideological implications of, the income support provisions for people with a disability require further analysis and extrapolation. Such an analysis would assist in

generating richer insights into why the traditional targeted form of disability income support is the dominant model of income support provision within Australia.

Any research grounded in income support policy, such as the present study, necessitates a brief scoping of the history of poverty and methods for alleviating poverty. This is because the original intent of disability income support measures centred on the notion that they would go some way in alleviating the effects of poverty for people with a disability. However, as noted in the social policy and disability studies literature (such as Abberley, 1999, 2002; Palmer, 2011; Saunders, 2003, 2005a, 2005b, 2005c, 2007, [SPRC]; Saunders & Naidoo, 2009, [SPRC]; Saunders, Naidoo & Griffiths, 2008, [SPRC]), the experience of financial hardship and poverty consequences have been a key feature in the lives of people with a disability, particularly people in receipt of disability income support. Harding and Szukalska (2000, cited in Brotherhood of St Laurence, 2005a) explain that:

As the life circumstances of Australians change, due to such factors as ... unemployment and ageing, many become dependent upon the Australian social security system ... being dependent upon government cash benefits is still the single key characteristic shared by those in poverty in Australia. (p. 1)

The relevance of the Harding and Szukalska's (2000) commentary is that people who live in poverty are also reliant on some form of subsistence by which to live, such as the income support system. They noted that poverty can result from barriers, such as lack of access to employment, and other dimensions such as age or disability. Different individuals experience greater or lesser poverty depending on whether the Commonwealth accepts that the level of impairment qualifies for income support, and if so, which form of support. The Disability Support Pension is paid at 25 per cent of the average wage, which equates with the current Henderson Poverty Line, whereas, the unemployment benefits are paid at 40 per cent of the Henderson Poverty Line (Brotherhood of St Laurence, 2007). It is not within the scope of the present study to provide an in-depth examination of the history of poverty research, conceptual issues and poverty trends for whole populations. Social policy researchers, such as Gruen (1995), Johnson (1996), Palmer (2011), Saunders (1994, 1995, 2005b, 2005c, [SPRC]), Saunders and Naidoo (2009, [SPRC]), and She and Livermore (2009), have undertaken comprehensive theoretical analyses of these issues. The following section now turns to the issue of poverty. The section explores the historical basis of poverty implications and establishes the relevance of poverty concepts to the Australian disability income support policy.

## **2.4 Income Support Policy and the Contentiousness of the Poverty Concept**

Conceptualising what constitutes poverty can be difficult in that there is a multitude of different ideas concerning poverty, as in absolute, relative and socio-spatial poverty. The

range of competing ideological stances exacerbates the difficulties of defining poverty. For example, the Commonwealth Government's official inquiry into poverty measurement in 1981, was instigated to assist the government to determine an appropriate level of income support (Social Welfare Policy Secretariat, 1981). The approach employed by the Social Welfare Policy Secretariat rejected the use of Henderson's 1975 (Commonwealth of Australia, 1975a, 1975b) definition of poverty, underpinned by universal principles, and challenged its applicability by proposing a "conventional approach" (Gleeson, 1998; Social Welfare Policy Secretariat, 1981). Conservative ideological notions become apparent in features such as the assumed "cost to taxpayers" in the provision of income support, and the rejection of universal approaches (Social Welfare Policy Secretariat, 1981, pp. 10-11).

Similar ideological arguments arise in the differing approaches to measuring poverty. Poverty measurement is a highly contested area of social policy research, made even more apparent under a government adhering to policy regimes which value the pre-eminence of cost cutting, budget surpluses and reduced public expenditure over social policy objectives (Fincher & Wulff, 1998; Palmer, 2011; Saunders, 1999, 2005a, 2005b, 2005c, 2006, 2007, [SPRC]; Saunders & Naidoo, 2009, [SPRC]; Saunders, Naidoo & Griffiths, 2008, [SPRC]). The key guiding dimension drawn on in income support policy research into poverty is related to the concepts of income and in/adequacy (King, 1998) and later works by universal social policy theorists (such as Standing, 2002, 2011) on income security and income insecurity.

### **Henderson Poverty Line**

Notably within Australia, the Henderson Poverty Line developed by Professor Ronald Henderson in the early 1970s, while containing some liberal ideals, drew on principles of universalism and provided the most comprehensive and useful poverty measurement tool (Brotherhood of St Laurence, 1980, 2000a, 2000b, 2000c, 2007; Commonwealth of Australia, 1975a, 1975b). Saunders (1999, [SPRC]) explained that Henderson's key focus in the Henderson Report into Poverty, 1975, was on "identifying the nature and extent of poverty due to inadequate income, in the sense of income being low relative to need" (p. 55). For the first time within Australia in relation to policy research on poverty, a connection between the extent of poverty, income levels and primary problems (such as inadequate job opportunities and income support levels) was generated and a corresponding measuring tool developed for making determinations around the setting of income support levels.

The contribution of the Henderson Poverty Line was significant in that the dimension of "primary poverty is measured by comparing the actual level of disposable income, adjusted for need, with a poverty line expressed in monetary terms" (Saunders, 1999, p. 57, [SPRC]; Saunders & Smeeding, 2002, [SPRC]). The central unit of analysis for poverty estimates was the income unit which was analysed on the basis of the family grouping's shared income or



pensions/benefits (Saunders, 1998, p. 57). Thus, this tool measured the amount of money required by families to maintain an adequate, yet basic, standard of living, particularly to meet essential living costs and collective needs (Brotherhood of St Laurence, 2000a, 2000b, 2003, 2007; Saunders, 1999, 2005b, 2005c, 2007, [SPRC]; B. Stanton, 1973).

Relevant to the present study, Saunders (1999, 2005b, 2007, [SPRC]) further pointed out that Henderson's contribution was significant in terms of the argument for a guaranteed minimum income and the innovation of the conceptual framework, which distinguishes direct taxes, transfer incomes and benefits from "market income" (p. 13). Saunders highlighted that Henderson's work continues to influence research on poverty in relation to income support policy. For example, the Brotherhood of St Laurence (2005a, 2005b, 2005c, 2007) draw on and update the Henderson Poverty Line to reflect current social conditions for measuring the adequacy of income security payments. The Henderson Poverty Line is also applied by the Brotherhood of St Laurence to assess the incidences of poverty within Australia. Because of its conceptual comprehensiveness and underpinning universal principles, the Brotherhood of St Laurence also uses the poverty line as a mechanism for proposing updates to income support rates. Similarly, the Melbourne Institute of Applied Economic and Social Research (2010, [MIAE&SR]) use an updated version of the Henderson Poverty Line to set a benchmark for poverty line estimates.

Notwithstanding, the Henderson Poverty Line is not without its critics, most notably Saunders (2004a, [CIS]), Saunders and Tsumori (2002, [CIS]) and Tsumori, Saunders and Hughes (2002, [CIS]). D. I. Stanton (1980) provided a comprehensive critique of the Henderson Poverty Line and offered alternative approaches to poverty reduction. Critiques of the Henderson Poverty Line centred on issues about the arbitrary nature of the measurement, including its failure to capture some of the structural changes of poverty in society, such as changing economic policies and family living arrangements. Saunders (1998, [SPRC]) noted that:

The poverty measurement debate is important because, without a poverty line, it is not possible to identify the extent of primary poverty. Without that, discussion of the causes of poverty can only take place at an abstract level, far removed from the practical experience of everyday. (p. 69)

From this examination, the implications of the Henderson report and definition of poverty in terms of primary poverty (income levels or adequacy of income support) is a useful definition and will be applied throughout the present study.

Saunders (2007, [SPRC]) later explored the relevance of the Henderson Poverty Line. He noted that the tool did not fully encapsulate the indicator of "direct living standards" which were perceived to be an important component in measuring poverty in relation to disability

income support. Highly useful to this study is the incorporation of actual poverty and deprivation indicators into a study of income support policy found in the works of Saunders and Naidoo (2009, [SPRC]), Saunders and Wong (2009, [SPRC]), Saunders, Naidoo and Griffiths (2008, [SPRC]). Saunders et al. (2008, [SPRC]) contend that a recent *national* (Dawkins, Gregg & Scutella, 2002; A. Harding, Lloyd & Greenwell, 2001; Lister, 2004; Saunders, 2005b [SPRC]; Saunders & Naidoo, 2009, [SPRC]; Saunders & Wong, 2009, [SPRC]) and *international* (Arthurson & Jacobs, 2004; A. Atkinson, 2007; Berthoud, Bryan & Bardarsi, 2004; Boarini & d'Ercole, 2006; Bradshaw, 2004; Burchardt, Le Grand, & Piachaud, 1999; Combat Poverty Agency, 2002; Klasen, 2000; Levitas, 2000; Pantazis, Gordon & Levitas, 2006; Willits, 2006)<sup>8</sup> feature of poverty literature and government responses to poverty centred on the changing nature of the concepts, as well on deprivation and marginalisation.

Saunders and Wong (2009, [SPRC]) and Saunders et al. (2008, [SPRC]) argue that deprivation and marginalisation are connected to notions of poverty and can be useful in extending an analysis of income support policy. However, their central argument is about shifting away from using poverty lines as a sole measurement of poverty. Rather than totally disregarding poverty lines, the social policy theorists suggest that poverty lines remain an important analytical tool for measuring poverty and disadvantage (both within and across countries). However, these policy theorists contend that benchmarks for poverty rates required additional measures, such as measuring deprivation, to assess the actual scope of disadvantage (Saunders et al., 2008, [SPRC]). In many parts of the developing world, absolute poverty is widespread, whereas in developed countries, it is more a question of relative poverty. The Henderson Poverty Line uses indicators and estimates associated with relative poverty (MIAE&SR, 2010). These insights help to develop a comprehensive understanding of poverty measures and the implications of ideological tendencies inherent in disability income support policy.

### **Poverty, disability and income support policy**

Gleeson (1998) identified four key elements of poverty relative to people with a disability, including employment exclusion and exploitation, income deprivation, social service inadequacy and physical inaccessibility. The Henderson Poverty Line, Gleeson suggested, was instrumental in advancing the notion that disability and poverty were connected to socio-economic conditions (as in employment status and restricted labour market participation). Gleeson stated that Henderson's Policy recommendations in 1975 contained two important

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<sup>8</sup> These studies use the terms social inclusion and social exclusion. The re-transformation of the social exclusion concepts takes into account complexities in which exclusion results from "a lack of interconnectedness" (Saunders et al., 2008, p. 178, [SPRC]). As noted in the Introduction Chapter, for the purpose of the present study, social inclusion forms part of the concept of social citizenship. The researcher applies the term marginalisation in keeping with the disability and social citizenship literature.

premises: firstly, that the distinction between pensioners (people with a disability) and beneficiaries (people who were deemed “ill”), be maintained in income support categories, given that disability is linked to socio-economic conditions and a permanent state; and secondly, that the Commonwealth provide “a pension with a generous income test” as an incentive for work. Gleeson added that Henderson’s progressive approach was based on the perspective that stringent income tests for determining eligibility tended to operate as “employment disincentives” for people with a disability. It is these ideological assumptions concerning incentives relative to disability income support policy that are of relevance to the present study.

Gleeson (1998) points out the influence of the Henderson report on increasing awareness of the complexity of the social and economic disadvantage of people with a disability. However, he further recognised that Henderson’s long-term vision of economic security and social participation for people with a disability had not been realised. Despite the implementation of poverty alleviation initiatives by both State and Federal Governments, Gleeson (1998) identifies that poverty for people with a disability remained a significant social problem within Australia. The issue of poverty for people with disability has been quantified by disability social theorists and disability social policy writers such as Oliver (2009), Palmer (2011), Saunders (2007, [SPRC]), Saunders and Naidoo (2009, [SPRC]), and Saunders et al. (2008, [SPRC]). Similarly the OECD (2007, 2008, 2010) has provided detailed statistical evidence which points to the correlation between the incidence of disability and poverty, financial hardship and unemployment within Australia and across other OECD countries. Numerous inquiries have been conducted by the Commonwealth Government including the inquiry into poverty by the Commonwealth Government (1975a, 1975b) and the Senate Committee Inquiry and Report into Poverty and Financial Hardship (Commonwealth of Australia, 2004), which indicated support for the assertion of the connection between poverty and disability. Internationally, the OECD (2010) has reported on quantitative studies to develop an evidence-base concerning the issue of poverty and disability and draw attention to the financial hardship experienced by people with a disability. Clearly, further examination helps to develop a better understanding of the implications of the Australian targeted disability income support system and an alternative model.

### **Individual-functional theories of poverty and disability income support**

Theories that establish individual causes of poverty in terms of a genetic, moral or personality defect (for example, idleness, “crippled” and shiftlessness) tend to pathologise particular groups, specifically people in receipt of income support. Poverty and its counterpart unemployment are not only a consequence of capitalism, but also a result of broader unequal social conditions. Indeed, academic arguments connecting poverty to individual deficiencies have been well documented and can be traced as far back as 1908 and 1914 (for example Parmalee, cited in Fairchild, 1917). However, the concern for poverty

relief, and “alms and beggars” dates back even further, when considerations of welfare and the English Poor Laws (1601 and 1800s), Medieval Society and the Roman Republican era are taken into account (Ayer, 2004; Geremek, 1994; Polanyi, 1945).

Individual-functional theories (Abbott, cited in Marris, 2001) suggested that individual actions contribute to poverty, and thus individuals are responsible for experiences of financial hardship. A media article by Thornton (2000) highlighted the discursive strategies used by the government in power to individualise poverty consequences. He wrote of the report entitled *Behavioural Poverty* by Lucy Sullivan (2000, [CIS]) who argues “the poor have only themselves to blame for their plight”. The report attacks people on income support because they “live squalid, unhealthy and anti-social lives” (Sullivan, cited in Thornton, 2000). Thus, poverty becomes embedded in a moral argument framework in which poverty is ideologically constructed as an individual character deficit. The ideological power of the rhetoric potentially absolves the government of any obligation to provide welfare (Ayer, 2008), the exception being welfare relief provision to the “genuinely needy”. It is these features which require further explication, particularly in relation to disability income support policy. The adoption of individual-functional theories in disability income support debates may not account for the limited empirical basis of such policy positions and excludes alternative models from the policy agenda.

## **2.5 “The Paupers Lot in Life”: Disability Constructs and the Argument for Income Support**

The connection between poverty and disability is widely recognised and well documented in the disability and income support literature, including quantification by the Department for International Development (2000, [DFID]), Elwan (1999), Mont (2007), the International Labour Organization [ILO] (O'Reilly & the International Labour Office, 2007) and the United Nations (2006, 2008). The United Nations (2006, 2008) identified that approximately 10 per cent (approximately 650 million) people world-wide have a disability. O'Reilly and the International Labour Office (2007) in an ILO report highlighted that of these 650 million people with a disability, 426 million live below the poverty line. Theorists and welfare organisations<sup>9</sup> also highlight that people with a disability tend to experience a higher incidence of poverty and unemployment than people without a disability. This, they advance, is related to a range of historical features underpinning society, including inaccessible and inflexible work environments. In advancing the argument further, Beresford (1996) suggested that the restricted access of people with a disability to employment opportunities can be linked to broader prejudices, such as notions of unreliability attached to people with a

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<sup>9</sup> Theorists and welfare organisations include Abberley (1987), the Australian Council of Social Services (2006, [ACOSS]), Barnes (2002, 2007), Beresford (1996), Brotherhood of St Laurence (2005a, 2007), Clear and Gleeson (2002), Danek (1992), Gleeson (1997, 1998), Gibilisco (2003, 2005), Goffman (1963), Priestley (2000), Saunders (2005a, 2005b, 2005c, 2006, 2007, [SPRC]), She and Livermore (2009), and Townsend (1979).

disability. Gibilisco (2003) similarly highlighted the financial insecurity experienced by people with disabilities in the Australian political economy. This assertion of the link between poverty and disability experiences is supported in the findings of numerous studies, including Mont (2007), O'Reilly and the International Labour Office (2007, [ILO]), the Australian Senate Committee Inquiry and Report into Poverty and Financial Hardship (Commonwealth of Australia, 2004) and the United Nations (2008).

The Senate Committee Inquiry and Report into Poverty and Financial Hardship (2004) revealed the strong connection between poverty and disability. The report revealed that the pervasiveness of poverty for people with disabilities is primarily related to socio-economic conditions such as labour market conditions and low incomes (Commonwealth of Australia, 2004). The hearings yielded rich data and narratives on the experience of poverty by people with a disability. This data has been elaborated on in Epoch Four of the findings chapter, Chapter Five, in this thesis.

Perhaps most saliently in her submission to the Committee, Mrs Allan<sup>10</sup> summed up what poverty means in real terms by asserting that conventional wisdom tends to “accept” that people with a disability will live in poverty (p. 363). She further revealed that she subsisted on the “disability support pension.... [but] I never imagined [I would have to resort to] ... eat[ing] Weetbix regularly for my dinner, so that I could stretch the budget [to afford to pay for other things like rent, electricity]” (p. 265). Mrs Allan is recounting the insecurity of having to pay for standard utilities by cutting back on such essential items as food. She further noted that the financial struggle becomes a part of everyday reality. In this example, rather than enhance social determination and dignity, the necessity of being reliant on disability income support has exacerbated poverty consequences.

In contrast, Sherry (2002) noted that many people with a disability have participated, and continue to participate, in paid employment. While many disability writers, such as Russell (2001a) and Gibilisco (2003, 2005), would support this assertion, they also pointed out that the types of employment tend to be insecure or highly casualised labour with little or no remuneration. As such, people with a disability tend to maintain a meagre existence in paid work while simultaneously drawing from a disability pension. For Gibilisco (2003), one means to ameliorate poverty consequences is via the provision of “collective assistance” from the Commonwealth. He added that modern strategies of income support policies emphasise liberal justice principles at the expense of social justice principles. Gibilisco's criticism echoes the contentions made by Russell (2001a) who argued that global neo-liberal reforms have impacted on redistributive strategies for disability income support.

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<sup>10</sup> Committee Hansard 28.7.03, pp. 1015-1016 (Mrs Allan). (Commonwealth of Australia, 2004).

This section has identified that disability social theorists, such as Gibilisco (2003) and other researchers (such as O'Reilly and International Labour Office, 2007), have long argued for some form of income security and the examination of poverty consequences for people with a disability. This is particularly important in that governments can fall back on traditional policy responses that do not necessarily lead to improvement in the lives of people with a disability, rather than seeking policy alternatives in the interests of the wider public (Anderson, 1971, 1979; Bessant et al., 2006; Dalton et al., 1996; Heidenheimer, Heclo & Tech Adams, 1990; Hicks and Esping-Andersen, 2005; Smyth, 2006). The discussion of the Australian disability income support system in the 20<sup>th</sup> and early 21<sup>st</sup> centuries, including the exploration of poverty implications, has pointed to the need for examining disability income support policy over time. In order to conduct the present study, a theoretical framework was developed, which provided some basis for capturing the principles of social policy analysis for income support.

## 2.6 Chapter Conclusion

This chapter has examined the foundations of the Australian income support system in order to contextualise the historical debates in the 20<sup>th</sup> and 21<sup>st</sup> centuries concerning disability income support policy. Major historical eras central to Australian disability income support were scoped to develop an initial understanding of the broad developments. The First Epoch (1908 to 1940) captured key developments central to the development and implementation of the Commonwealth Invalid and Old-Age Pensions Act 1908. The Second Epoch (1941 to 1985) reflected legislative, policy and administrative changes to disability income support policy following a period of relative stability in the Invalid Pension. The Third Epoch (1986 to 1995) represented a change from the Invalid Pension to the Disability Support Pension in 1991. The Fourth Epoch (1996 to 2007) reflected a time of significant changes to the Disability Support Pension in line with broader government of the day policy. Exploring the concept of poverty in relation to disability income support assisted in further contextualising the purpose of the present study.

This study entails tracing the historical patterns and ideological assumptions underpinning the Australian disability income support system from 1908 to 2007 and exploring an alternative model. The present study examines the primary research question of *what underpins the Australian disability income support system and leads to the dominance of the targeted income support system for people with a disability over alternative models?* In order to do this, a comprehensive examination of the dominant Australian disability income support model is undertaken using a critical historical-comparative policy approach and critical discourse analysis. The same approach is used to explore the principles underpinning the alternative Basic Income model. In doing so, the thesis aims to trace the historical patterns and ideological assumptions of the Australian disability income support system to understand the way in which disability income support has been constructed over time. The thesis also

seeks to explore the extent to which an alternative model (Basic Income) promotes the social citizenship of people with a disability.

The study identifies the ontological position of historical materialism, combined with critical social science epistemology to allow an examination of disability income support policy within Australia. Thus, the next chapter details the critical historical-comparative policy analysis methodology, together with critical discourse analysis method, used for exploring textual data sources, such as policy documents and speeches, which are central to disability income support policy. The researcher also scopes some the issues of research integrity in terms of ethical considerations and research rigour underpinning the research approach.





## CHAPTER THREE

### The Use of Critical Historical-Comparative Policy Analysis Methodology and Critical Discourse Analysis Method to Explore Disability Income Support

#### 3.1 Introduction

Scoping the literature assisted in framing the methodological approach and methods relevant for the conduct of the study. This chapter details the research strategy and design central to meeting the study's aims. The study used critical historical-comparative policy analysis methodology to develop the Disability Income Support Analytical Framework for guiding analysis. The chapter outlines this application of critical historical comparative policy analysis and then describes the critical discourse analysis method adopted. (For a comprehensive account of the research strategy and methodology refer to Appendix One). The chapter also sets out the domain areas of texts for data collection and the approach to data analysis. Considerations of research integrity, ethical issues and rigour are subsequently outlined.

The following thesis statement reflected the aims of the study:

*This thesis examines the extent to which the Australian disability income support model, based on targeting, reinforces and perpetuates disablism. It further explores the degree to which the Australian disability income support system potentially contradicts the principles of social citizenship for people with a disability who receive income support.*

#### 3.2 Use of Critical Historical-Comparative Policy Analysis

In the initial methodological scoping, the researcher drew on existing welfare state regime contributions by social policy theorists<sup>11</sup> to develop a preliminary guiding framework for analysis. The use of welfare state regime typologies is not expected to be definitive or exhaustive in the present study. There is no single welfare state regime which can be depicted due to the propensity for variations and mixes across several regimes within any given country (Bessant et al., 2006; Cook, 2004, 2006; Esping-Andersen, 2000, 2003; Graham, 1977; Sharkansky, 1979). Thus, some form of typology was required to analyse the Australian welfare state in relation to disability income support policy. It is also for this reason

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<sup>11</sup> For example, several traditional theorists who have devised welfare state regime models for comparative policy analysis, incorporated, in chronological order, Titmuss (1974, 1976) (*residual welfare model, industrial achievement performance, institutional redistributive*); Mishra (1981, 1999) (*residual and institutional*); Castles and Mitchell (1991) (*liberal, conservative, non-right hegemony and radical*); and Huber and Stephens (2001) (*liberal, Christian democratic, social democratic and wage earner*). Other notable typologies included Hicks and Kenworthy (2003) and Swank (2002).

that the researcher developed the Disability Income Support Analytical Framework relevant to the aims of the study, that is, for examining across time and model dimensions.

### **Developing the Disability Income Support Analytical Framework to Guide Analysis**

From here, the researcher identified the existing contributions from Esping-Andersen (1990, 2000), Goodin et al. (2000), Standing (2002), and Tomlinson (2000a, 2000b, 2003) useful for the present study. Each of these four theorists (Esping-Andersen, 2000; Goodin et al., 2000; Standing, 2002; Tomlinson, 2000a) used a common set of core components that can be applied to the present study. The common set of core components incorporated, *liberal/neo-liberal (libertarian)*, *conservative/neo-conservative (corporatist)*, *social democratic* and *Socialist-Marxist ideology (social solidarity)* ideology, which help to classify and organise diverse types of welfare state regimes (Bessant et al., 2006). Standing's (2002) additional components consisted of *combined contractual exchange* and *social solidarity paradigm* (compassionate conservatism/Third Wayism) and *citizenship rights paradigm* (economic democracy).<sup>12</sup> Tomlinson's (2000a) contribution included *feminist ideology* and *racism*. The terms ideology and paradigm were used interchangeably by the social theorists.

The researcher drew on these four typologies (Esping-Andersen, 2000; Goodin et al., 2000; Standing, 2002; and Tomlinson, 2000a) to develop a typology for the analysis of disability income support. The results of this development are indicated in Figure 1. Also notable in Figure 1 are the dimensions (historical and disability dimensions respectively) that have not been incorporated into existing welfare state regime typologies.<sup>13</sup> It is these historical and disability dimensions that are of particular significance to the present study.

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<sup>12</sup> Standing (2002) used the term paradigm, rather than ideology, to capture the range of ideologies contained within the welfare state regime.

<sup>13</sup> In the later works of Hicks and Esping-Andersen (2005), they found that not all comparative analyses using welfare state regime typologies incorporated historical developments and ideological dimensions. Arguing for the inclusion of historical and ideological components, Hicks and Esping-Andersen contended that "classifications ... become ahistorical and may very easily miss out on important shifts and historical volatility... the basic logic of social policy within one regime may change character from one era to the next" (p. 521).



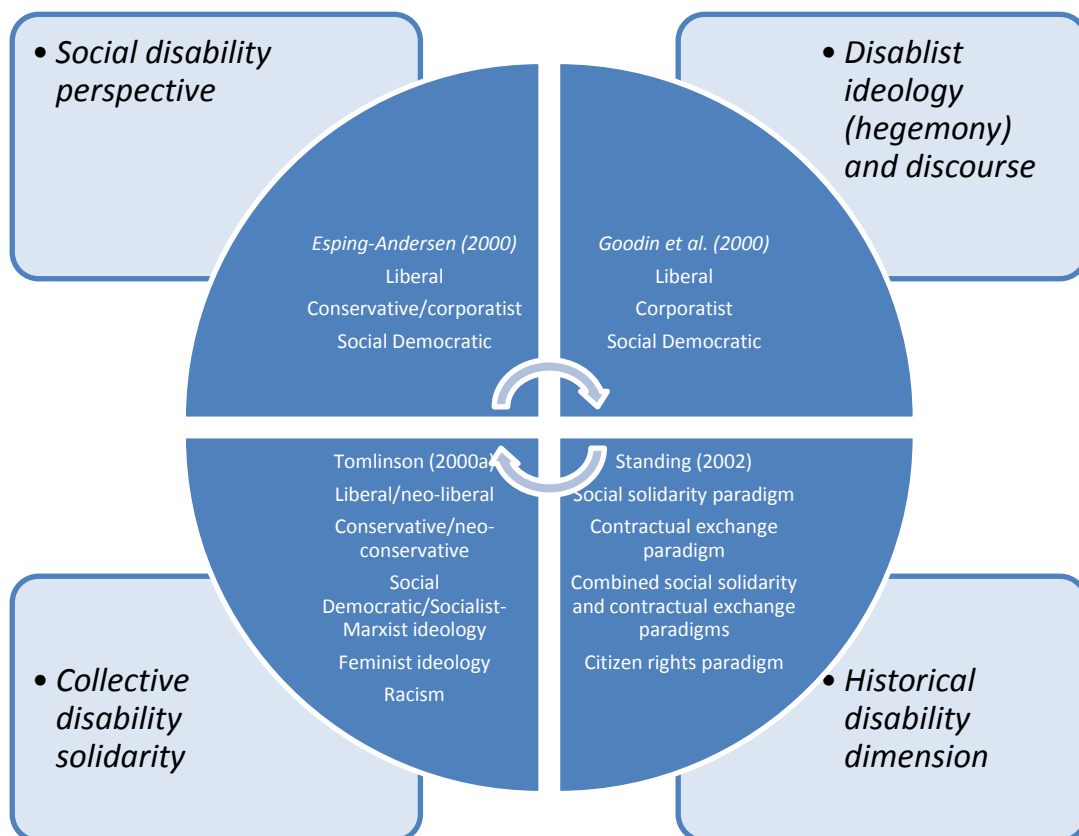
**Figure 1:** The four theorists' typologies of welfare state regimes relevant to present study in comparative policy analysis, including dimensions not revealed

<sup>a</sup> Standing (2002) devised overarching components of welfare state regime typologies which comprised *Social solidarity paradigm* (social democracy); *Contractual exchange paradigm* (libertarianism); *Combined contractual exchange and Social solidarity paradigm* (compassionate conservatism & Third Wayism); and *Citizenship rights paradigm* (economic democracy).

### Disability Income Support Analytical Framework: Incorporating additional historical disability dimensions

Following the identification of gaps in the existing contributions by social theorists (Esping-Andersen, 2000; Goodin et al., 2000; Standing, 2002; Tomlinson, 2000a), the researcher used their framework as a starting point for the comparative analysis of disability income support policy. However, the initial frame for analysis, generated by the researcher, needed to incorporate *social disability perspective*, *disablist ideology (hegemony) and discourse*, *historical disability dimension* and *collective disability solidarity*, drawn from the previous chapters.

Figure 2 below, illustrates the Disability Income Support Analytical Framework and exemplifies this extension of the four components as an initial frame for analysis developed by the researcher. As shown in Figure 2, the first section (inner circle) from a clockwise direction, demonstrates the core components underpinning the welfare state regime typologies of the policy theorists, Esping-Andersen (2000), Goodin et al. (2000), Standing (2002) and Tomlinson (2000a). These four categories are themed in terms of *liberal/neo-liberal (libertarian)*, *conservative/neo-conservative*, *corporatist*, *social democratic* and *Socialist-Marxist (social solidarity)* ideologies. The second section (portrayed in the outer frames) of Figure 2 is a matrix depicting the relationship between the core components of the welfare state regime typology and subsequent contribution of components incorporated into the present study's typology. This researcher's conceptual dimensions are: *social disability perspective*, *disablist ideology (hegemony) and discourse*, *historical disability dimension* and *collective disability solidarity*.



**Figure 2:** Disability Income Support Analytical Framework: Extension of four typological components to incorporate additional historical disability dimensions

To date, considerations of historical disability dimensions and disablist ideology in income support policy tend to be de-emphasised or alternatively over-generalised. However, as demonstrated in Figure 2, there is a need to further extend welfare state regime typologies to incorporate the *social disability perspective*, *disablist ideology (hegemony) and discourse*, *historical disability dimension* and *collective disability solidarity*. Such a contribution extends

current theorising of disability income support policy to generate insights into the representation of disability in disability income support policy.

In summary, the Disability Income Support Analytical Framework developed from the critical historical-comparative methodology (Refer to Appendix One for greater detail) provided a theoretical framework to guide analysis. The way Disability Income Support Analytical Framework is applied in analysis is detailed later in the analysis section of the chapter. The next section outlines the method used in the study to collect and analyse data.

### **3.3 Method**

In researching disability income support, policy texts are key data sources for interpretation and explanation. Given this consideration together with the overarching qualitative nature of the study, the researcher employed critical discourse analysis to examine the textual data sources relevant to disability income support.

#### **Critical discourse analysis method**

Critical discourse analysis is an accepted method for social policy and disability research.<sup>14</sup> Additional support for the qualitative nature of this study, particularly the historical aspect incorporated into critical discourse analysis comes from Reisigl and Wodak (2009). Legitimacy for the method has been further established given the tendency for traditional policy research to neglect discursive (language) and socio-material aspects of policy or policy problems (P. Atkinson & Delamont, 2005; Bessant et al., 2006; Brodtkin, 1993; Connor, 2007; Fairclough, 2001a, 2001b; Frølund Thomsen & Andersen, 2000; Hall, Critcher, Jefferson, Clarke & Roberts, 1978, 2006; Larsen, 2006; Marston, 2000, 2004; Peräkylä, 2005; Riggins, 1997; Thompson, 2003; Torfing, 2005; Willis, 2007). Consistent with the purpose of the study, Fairclough's (2003)<sup>15</sup> social dimension of discourse analysis and Gramsci's (1977, 1996) theory of hegemony are used to develop a deeper exploration of the historical and ideological dimensions of disability income support policy.

#### **The pragmatics of applying Fairclough's (2003) discourse analysis and Gramsci's (1977) theory of hegemony**

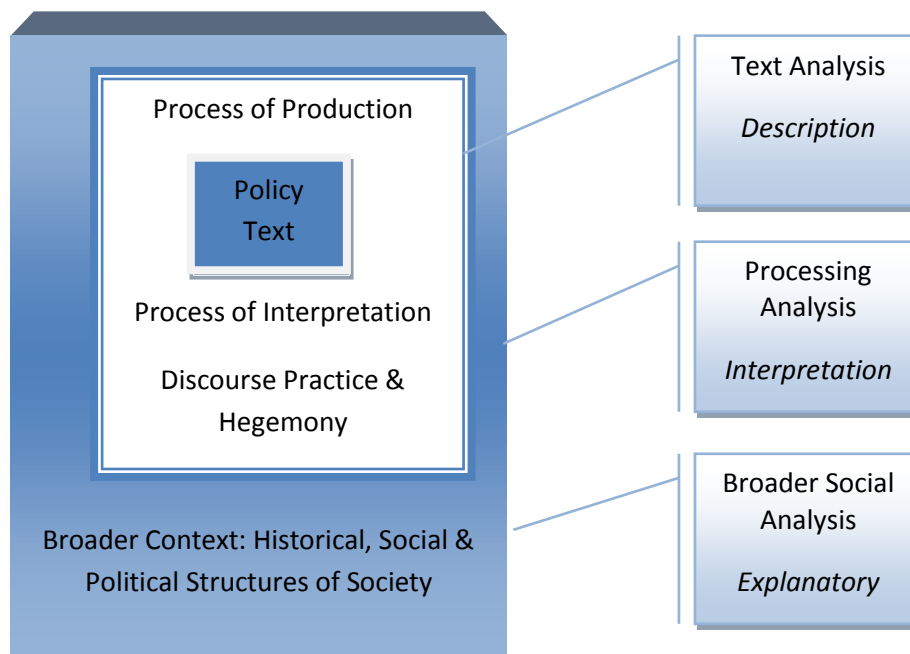
This section now turns to the pragmatics of using Fairclough's (2003) method of critical discourse analysis in conjunction with Gramsci's (1977, 1996) theory of hegemony. Figure 3 below captures the essential dimensions of critical discourse analysis drawn from Fairclough

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<sup>14</sup> For example, see Bessant et al. (2006), Connor (2007), Fairclough (1992, 1995, 2000, 2003, 2009), Hastings (1999), Marston (2001, 2004), Quibell (2004) and Wodak and Meyer (2009).

<sup>15</sup> To frame his argument, Fairclough (2003) drew on the Wittgenstein (1955, 2001) presupposition of no singular philosophical analytical method. Discourse analysts, for example, van Dijk (1993, 1997a, 1997b, 1998) previously argued for an inclusive use of discourse analysis, that is, applying critical discourse analysis in its totality, whereby linguistics (grammar, syntax and lexicon) is the predominant component. Advancements by Fairclough (2003) extended the application of the critical discourse analysis method to policy research.

(2003) and Gramsci (1977, 1996) and applied in this study. Most notably in this depiction is the way disability income support policy texts are situated within policy production, interpretation, discourse practice and hegemony and the broader historical and socio-political structures of society.



**Figure 3:** Dimensions of critical discourse analysis from description to explanation (Fairclough, 2003; Gramsci, 1977, 1996)

### Policy Text and Process of Interpretation

For the study, the application involves detecting the social problem aligned with the research question, and the *emergence and constitution* of discourses and processes surrounding disability income support policy (Fairclough, 2009; Fairclough, Jessop & Sayer, 2004; Reisigl & Wodak, 2009). In doing so, the researcher examined the origins and constitution of disability income support policy texts, such as policy reports, that refer to issues surrounding disability pensions. In this study, the researcher is interested in exploring emergent *discursive themes* (hegemonic dialectical relations of texts) and *discursive formations* (semiotics containing genres, discourses and style) in relation to the *social relations of power and ideology* that can be explicated (Fairclough, 2009; Reisigl & Wodak, 2009; Thompson, 2003; van Dijk, 1998; Vidich & Lyman, 2000).

The researcher was interested in identifying these patterns to explicate the constructions of disability together with the implications of these constructions. Thus, the researcher explored the texts for properties of discourses (signifiers) which are used to transmit meanings and legitimate particular social constructions of reality (Fairclough, 2009; Reisigl & Wodak, 2009). The *orders of discourse* are important in that they reflect the way language is structured and organised to produce meaning (Fairclough, 2009). For example, some disability income

support policy discourses may be ordered around dominant mainstream interests or, in contrast, capture marginal and alternative discourses (Fairclough, 2009). Exploring the orders of discourse generates insight into the way language has operated historically to make people with a disability “objects of policy”, through policy processes (Dalton et al., 1996; Davidson, 1992; Fairclough, 2001a, 2001b, 2009; Jessop, 2002, 2004, 2007; Martin, 2002; Marston, 2004; Oliver, 2009; Richardson, 2007; Riggins, 1997; Thompson, 2003; Torfing, 2005).

### **Policy Text and Policy Production**

The exploration helps to draw out the “meaning of categories”, textual regularities and the dialectical relations between semiotics and social practices used in legitimising disability policy texts and shaping social reality (Fairclough, 2003; Gramsci, 1977). For example, in this study, examining disability income support policy texts helps to detect the meanings ascribed to the concept of disability by the Commonwealth and the way administrative bodies (Departments) interpreted and justified their activities associated with the provision of disability income support, such as the criteria applied when assessing eligibility for disability income support (Fairclough, 2009; Stone, 1984). Exploring the meanings of categories helps to draw out the complexities associated with the creation of disability categories by the Commonwealth. This detection also assists in identifying the underpinning policy rationale used to support “moral distinctions” between groups, that is, distinctions among disability classifications and people assessed as not having a disability (Stone, 1984).

### **Discourse Practice and Hegemony (Broader Context)**

The *ideology and structure* (hegemony) component of critical discourse analysis involved the researcher examining orders of discourse and forms of intertextuality to discern the relationship between discursive practices and power. The researcher looked for instances in which orders of discourse were used to potentially reify the interests of the government in relation to disability income support policy within the context of broader social conditions (Fairclough, 2003; Gramsci, 1977, 1996). Here, the researcher looked for features which exemplify discourse practice and hegemony to understand why it is that some hegemonic features remain constant during significant periods of changes in policy language (Berg, 2007; Connor, 2007; Denzin & Lincoln, 2005; Fairclough, 2001a, 2001b, 2003, 2005, 2009; Hall, 1997a, 1997b, 2005; Howarth, 2000; Marston, 2000, 2004). This explication helps to identify the way some ideas become dominant and endure across the epochs. As the premise suggests, there is a connection between ideological components of text,<sup>16</sup> material

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<sup>16</sup> Also referred to as the “ideological work of texts” where policy language operates to shape a common-sense worldview (naturalisation of hegemonic values) of social reality, which is uncritically accepted and in turn reflected as objective truths (P. Atkinson & Delamont, 2005; Chouliaraki & Fairclough, 1999; Connor, 2007; Fairclough, 1992, 1995, 2003; Fairclough & Wodak, 1997; Wodak & Meyer, 2009).

society and social agency<sup>17</sup> (Kincheloe & McLaren, 2005). For example, the connection between ideology, policy texts and society is highly relevant for tracing dialectical interrelationship between government as “income support provider” and people with a disability as “recipients” (Bessant et al., 2006; Fairclough, 2003; Fairclough & Wodak, 1997; Kincheloe & McLaren, 2005; Leach, 1993). This process also included exploring the unintended consequences of particular courses of action concerning disability income support policy taken up by the Commonwealth Government.

In summary, applying the critical discourse analysis method with critical historical-comparative policy analysis methodology (Disability Income Support Analytical Framework, refer to Figure 2, Section 3.2) helps to examine the use of language in disability income support policy production and legitimation. For this study, it involves making transparent the hidden structures underpinning the broader system in which the Australian disability income support system and Basic Income model are situated. The approach to critical discourse analysis offered by Fairclough (2003) and Gramsci (1977) helps to discern the social relations of power and hegemonic discourse within and across differing time periods (Fairclough, 2003; Kincheloe & McLaren, 2005; Reisigl & Wodak, 2009). The next section turns to the procedures applied in the study.

### **Aligning the logic of discourse analysis and historical materialism**

The previous section’s assumptions do not suggest that there is an easy alliance between using discourse analysis within a historical materialist frame. Some post-modern researchers (such as Davis, 2006a, 2006b) argue that discourse analysis by emphasising the language of policy texts as a key aspect of power derives from a post-modernist stance (Davis, 2006a, 2006b; Fairclough, 2000; Foucault, 2000; Simmons et al., 2008; Wetherell, 2001). Indeed within discourse analysis research, it is an ongoing contention between the two positions (modern and post-modern/post-structural). Numerous debates (such as Glynos and Howarth, 2008 and Martin, 2002) have explored these issues around the “notion of subjectivity”, the history of ideas, and the meanings ascribed to discourse in the process of policy production from either a modernist or post-modernist stance.

For this study, Fairclough’s (2000) and Geras’s (1983), notion “arbitrary fixed” essence constitutes an appropriate approach, in which some degree of divergence in human nature is identified. This point also draws in Stråth’s (2007) position on an abridged version of historical analysis techniques for the study of disability income support policy discourse. This study employs the term “arbitrary fixed essence” to account for some degree of divergence in human nature, rather than reduce discourse and hegemony to fixed essences. By allowing for some degree of variance in the study, the researcher can link back disability policy

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<sup>17</sup> In saying this, the assumption does account for the impact of individual agency, psychological factors and “intents of the actor” in policy discourse (Bessant et al., 2006; Connor, 2007; Fairclough, et al., 2004).



discourse (micro analytical components) with the broader social and political structures of society and policy (macro analytical components) (Bocock, 1986; Fairclough, 2003; Marston, 2004).

Similar struggles in locating Gramsci's (1977) theory of hegemony within modernist standpoints, yet accounting for intertextuality, have been dealt with by Bevir (2000), Glynos and Howarth (2008), and Laclau and Mouffe (2001). Glynos and Howarth (2008) put forward that maintaining a study's ontological commitment requires an appreciation of political logics. This, they argue, allows for upholding the historical origins and formation of social relations, structures and language while recognising the sites of contestation and variance. Fairclough (2000), Geras (1983), Glynos and Howarth (2008), and Martin (2002) provide the most salient approach that does not reduce this study to fixed essentialism. These researchers contend that human life is textually mediated and theoretical categories need to account for such variance. For this study, Fairclough's (2003) critical approach to discourse analysis when incorporated with Gramsci's (1977, 1996) theory of hegemony helps to position this study in line with the logic of a modernist historical materialist approach.

Similarly, disability social theorists such as Abberley (1987), Barnes and Mercer (2003) and C. Thomas (1999) have responded to these issues in their analyses and identified that, although there are multiple constructions of disability, there are some universal antecedents which have influenced disability policy, such as exclusion from employment. Given these suggestions, the researcher argues that Fairclough's (2003) approach to discourse analysis together with the use of Gramsci's (1977, 1996) theory of hegemony remains appropriate for this study.

## **Procedures**

### **Research Boundaries**

Critical to the research project was the development of temporal (time) and model comparison boundaries for the study and data collection. Developing boundaries around disability income support policy allowed for containment of the data and upholding conceptual equivalence during the collation phase (Neuman, 2006). Specified boundaries were necessary to ensure correspondence between the measures of similar constructs (such as continuities or discontinuities underpinning administrative changes in disability pensions) and major time periods, across differing historical epochs (Bessant et al., 2006; Fairclough, 1995, 2003, 2009; Kincheloe & McLaren, 2005).<sup>18</sup> Further, to maintain conceptual equivalence, Charmaz (2006) and Fairclough (2003) suggested that texts need

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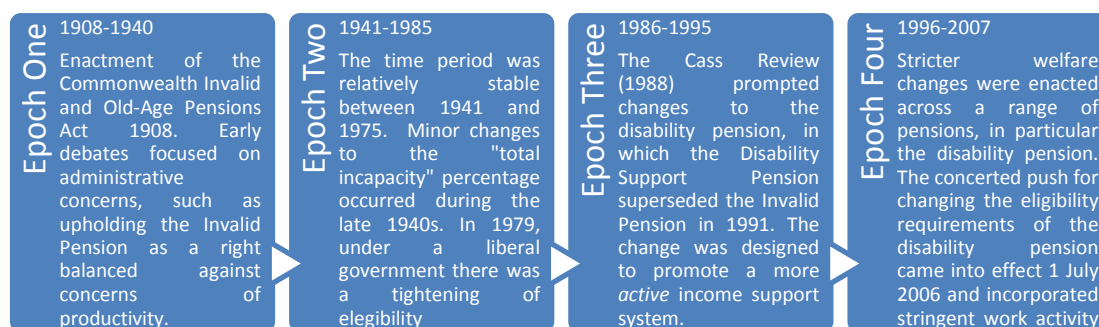
<sup>18</sup> Fairclough (1995, p. 135) argued that the consideration of temporal dimensions in critical discourse analysis assists in identifying qualitative nuances and historical implications for understanding contemporary conditions.

to be situated in relation to their context, particularly for discerning underpinning historical and contemporary patterns in the data. From here, the researcher defined the boundaries for the historical and comparison dimensions of the study.

#### i. Historical dimension: Defining specific historical epochs

The study involved tracing the historical evolution of the Australian disability income support provision and associated discourses across differing historical epochs from 1908 to 2007. The researcher acknowledges that in textual research not every specific detail can be traced, due to its inherent complexity (Bessant et al., 2006; Harris, 2008). Thus, the setting of time boundaries helped the researcher to engage with the policy textual data sources. Four specific time periods were chosen on the basis that each time period represented a significant administrative, legislative and policy change relevant to disability income support policy. Table 2 below builds on Table 1 in Chapter Two, and outlines the distinct historical time periods and identified patterns derived from each period developed by the researcher.

**Table 2 Major Historical Epochs and Identified Patterns Framing the Study**



Given that the historical component of the study captured the historical dimension from 1908 to 2007, placing a time limit for defining epochs and ending data collation at October 2007 was critical to the project. First, practical considerations, such as research project management, dictated the need for an end point in data collection. Second, the period between 2001 and 2007 represented a most significant contemporary policy change to disability income support, given that it formed part of the broader welfare changes instigated by the government in power. Finally, a change of federal government leadership occurred during November 2007.

Given the prescribed boundaries of the research strategy, it made sense not to include an examination of the disability income support policy of then incoming government. Any attempt to undertake a complete analysis of the policy implications would not be possible as it is outside the scope of the present study. In alignment with the historical dimensions

boundaries, the study incorporated a comparison of two models of income support relevant to disability policy.

## **ii. Comparison dimension: Income support model comparison**

Different income support systems contain varying ideological assumptions around the way disability income support payments are distributed (C. Alcock et al., 2004; Hicks & Esping-Andersen, 2005). The selection of the Basic Income model as a comparison is not by chance. In order to maintain logical consistency of the study, each model, the Australian disability income support system and the Basic Income model, needed to comprise a similar conceptual starting point. That is, both of these models of income support start with similar policy principles (for example, citizenship, equity and participation) (Fairclough, 2003; Gil, 1992; Grew, 1980). Various policy theorists, such as Bessant et al. (2006), Gil (1992), Goodin et al. (2000) and Tulloch (1979), referred to this reference point as measurement equivalence. Yet, each model contains points of divergence, such as ideological distinctiveness, relevant for comparison. For example, the Australian system is based on targeting, whereas Basic Income is based on universalism.

The researcher used the same four major historical epochs to identify texts that were relevant to Australian disability income support policy and Basic Income policy across time. Australia has never implemented a universal Basic Income model. However, this is not to say that the idea of universal income support has not been debated in Parliament since the inception of the Invalid/Disability Support Pension. The researcher examined data across each of the four epochs and sought elements of Basic Income depicted in legislation, parliamentary debates and administration. The researcher then compared the ideological dimensions and discourses associated with both of these models. These considerations further helped to orient the researcher to locating relevant textual data sources associated with the Australian disability income support model and the Basic Income model.

## **Data Collection**

Data collection occurred over a four-year time span, from January 2004 to October 2007. Having identified Disability Income Support Analytical Framework for analysis and the use of critical discourse analysis method, the researcher commenced collection of the relevant textual data sources for analysis. The use of textual data sources represented an unobtrusive inquiry relevant to the present study for generating a comprehensive range of data sources (Berg, 2007; Booth, Colomb & Williams, 2008; Ezzy, 2002; Lee, 2000; Prior, 2003; Scott, 1990).

Procedures were required to contain the amount of data collected. The following section details these procedures. Although each procedure is depicted in a linear fashion, often, and

in line with qualitative research, the process occurred in a non-linear, cyclical way (Connor, 2007). The researcher started by scoping textual data domain areas, and then using manual and digital strategies to access documents. Text descriptors helped to refine the manual and digital search strategies (Neuman, 2006). The initial search yielded an abundance of potential data sources. Thus, a purposive sampling strategy for data collection helped to refine the textual historical and comparative dimensions. This refinement helped to build an Australian disability income support textual corpus and a separate Basic Income textual corpus for data analysis (Charmaz, 2006; Flick, 2009; Lee, 2000; Scott, 1990).

### **Textual data domain areas**

The researcher scoped three domain areas to locate textual data materials and increase the trustworthiness and confirmability of the data analysis (Ezzy, 2002; Flick, 2009; Miles & Huberman, 1994, 2002; Patton, 1990). These three textual data domain areas consisted of:

- *policy* (technocratic and non-technocratic, and written or transcribed documents),
- *dominant mainstream media* (direct and indirect), and
- *alternative public discourse* (alternative viewpoints captured in policy submissions).

Thus, the range of textual data domain areas allowed for the inclusion of alternative data sources, such as alternative public discourse (Fairclough, 2003; Lemke, 1995), rather than privileging official documents as the only “authoritative and legitimate source” (Schudson & Waisbord, 2005, p. 357). This inclusion of alternative public discourse domain was in line with Lemke’s (1995) principle of “intertextuality” to support data dependability. In the study, media texts were read alongside and in relation to other policy and alternative public discourse domain texts to gain an understanding of multiple voices (Connor, 2007; Richardson, 2007). These data domain areas were applied to both the *historical dimension* (Australian disability income support system) and *comparison dimension* (Basic Income model).

### **Strategies to access documents: Manual and online digital techniques with text descriptors**

During this phase of data collection, the researcher used manual and online digital strategies to identify documents that would be applicable for the *historical dimension* (Australian disability income support system) and *comparison dimension* (Basic Income model) data sources. This data collection strategy provided consistency to the data sources (Lee, 2004) and involved accessing publicly available policy documents through manual and online digital means. The researcher accessed the university library, other academics and online digital systems (for example, the Internet; search engines; archive repositories [BIEN, BIGA]; and Gateways) (Charmaz, 2006; Flick, 2009; Kellehear, 1993; Lee, 2000; Prior, 2003; Scott, 1990).

Given that the study aim emphasised disability income support policy, the researcher used the manual and online digital strategies, to remove any unrelated documents (such as health, education or corrections policy documents). Text descriptors were applied to further refine the document search. These text descriptors included, disability, Invalid Pension, disability support pension, citizenship, invalidism and welfare changes.<sup>19</sup> Each source was sorted in line with the textual data domain areas and dated according to the corresponding historical dimension (epochs). For example, an online search of Parliamentary Hansard generated written records of official speeches (Appendix Two, Table 2.1, and Appendix Three, Table 3.1, for an example application of data collection strategies and data sources). The value for the researcher in using parliamentary speeches and questions on notice is that these documents have been previously transcribed and reflected “naturalistic” data whereby parliamentary speeches occurred within the natural setting, independent of the recording process (Charmaz, 2006; Flick, 2009).

The researcher used the textual data domain areas and historical epochs further to capture key snapshots in time whereby significant legislative, policy and administrative changes were occurring concerning the disability income support system. Hence, the essence of parliamentary debates reflecting the nature of the changes could be captured. During this phase, the researcher also noted variation among concepts such as *disability* and their changing form over time (Flick, 2009). Disability was not a prevalent term applied during the early parts of the 20<sup>th</sup> Century. Rather, concepts such as “handicapped” and “invalid” were widespread in official documents. An understanding and recognition of the changing nature of terms was critical to capturing key disability policy documents during data collection.

In some instances, the researcher found that “access to an archive does not necessarily entail access to every [italics added] collection within the archive” (Hill, 1993, p. 22). For example, during data collation, several searches on the Australian Parliamentary Library website, yielded links to data sources that had particular restrictions attached and were deemed restricted to “Ministers, Staff and Library Staff only”. Hence, although potentially relevant to the study, these “restricted” documents were, in effect, unavailable to the researcher (Flick, 2009; Hill, 1993; Lee, 2000).

#### **Purposive sampling combined with historical discourse research criteria for identifying textual data sources**

Once the broad sample of documentary sources was identified, a purposive sampling strategy combined with historical discourse analysis sampling criteria was employed to manage and limit data collection. It is beyond the scope of any research project to use all of

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<sup>19</sup> Additional text descriptors applied to the manual and online search included: Australian disability income support; citizenship, universal Basic Income, disability pension, disabilities, disadvantage, guaranteed minimum income, participation, poverty alleviation, social justice, targeting and welfare and dependency.

the data sources on income support policy. Purposive sampling integrated with historical discourse analysis criteria, used with the data domain areas and major historical epochs was particularly useful for this study in terms of identifying specific data sources which exemplified disability policy and capturing snapshots in time that reflected significant periods of legislative, policy and administrative changes (Berg, 2007; Charmaz, 2006; Denzin & Lincoln, 2005; Ezzy, 2002; Flick, 2009; Lee, 2000; Lemke, 1995; Willis, 2007). The purposive sampling strategy and historical discourse analysis criteria applied in this study were drawn from critical discourse analysis approaches suggested by Fairclough (2003) and Reisigl and Wodak (2009).

Purposive sampling for this study involved the use of selection criteria to sort through the documents and identify relevant sources for data analysis. The sampling selection criteria for sampling each of the selected texts centred on the texts' degree of *authority*, *authenticity*, *credibility*, *theoretical applicability*, *accessibility*, and *function*. Table 3 outlines the sampling selection criteria and definition of each one used for informing data source selection.

**Table 3 Selection Criteria and Definition (Fairclough, 2003)**

Sampling Selection Criteria	Definition
<b>i. Authority</b>	Data source is trustworthy and supported by relevant authority
<b>ii. Authenticity</b>	Data source is valid in origin and holds genuineness
<b>iii. Credibility</b>	Data source is accurate and convincing
<b>iv. Theoretical applicability</b>	Data source is relevant to disability income support policy issues
<b>v. Accessibility</b>	Data source is publicly available and accessible, i.e. via Internet
<b>vi. Function</b>	Data source has a specific function in shaping policy debates

For the historical discourse analysis aspect, the following five selection criteria proposed by Reisigl and Wodak (2009) were applied alongside the sampling selection criteria outlined in Table 3, together with the data domain areas and major historical epochs to add to the rigour of the study:

- *Specific political units* (nation state), that is, the policy texts locality in Australia or the wider Basic Income community.
- *Specific time period*: The texts location in a specific major historical epoch relevant to *significant discursive events*.

- *Specific social and political actors*: The authors or main actors, such as politicians, policy researchers, activists and media reporters who write or respond to disability income support policy texts.
- *Specific discourses and semiotics*: The texts discourses and semiotics relating to disability income support policy, political debates, parliamentary speeches and media.
- *Specific policy fields of political action*: The texts location in terms of policy processes and implementation, such as disability policy legislation changes (Reisigl & Wodak, 2009, p. 98).

These abovementioned sampling selection criteria (Table 3 and historical discourse analysis criteria) have similarly been used by Fairclough (2003, 2009), Hammer (2002), Lemke (1995) and Reisigl and Wodak (2009) in their studies. For example, in this study an online search of the BIGA (Basic Income Guarantee Australia) website revealed the Jordan (1984) policy text on the Invalid Pension. The researcher used the six sampling selection criteria (Table 3) and the five historical discourse analysis criteria to determine if the Jordan (1984) policy text represented an appropriate data source for analysis.

When measured against the criteria of authority and authenticity, the Jordan text reflected a trustworthy and valid source as it was a key policy document published by a relevant authority: the Federal Government within a specific political unit (Australia). The credibility of the document was established through the text author's position of policy researcher (specific social actor) in which he used authentic documents (such as media articles and archived Hansard transcripts of parliamentary speeches) (specific discourses and semiotics) as a basis for the text analysis of the Invalid Pension from 1908 to 1984 (specific time period). Theoretical applicability was derived from the document's direct relevance to disability income support policy, thus also meeting the criteria of specific policy fields containing specific disability policy discourses and semiotics. Ease of access was secured as the document was publicly accessible through online means. The researcher then ascertained the function criteria of the policy text. The Jordan text had a significant role in shaping the political debates involving the Invalid Pension and alternative proposals, such as guaranteed minimum income (specific discourses and semiotics).

The sampling selection criteria of *authority*, *authenticity*, *credibility*, *theoretical applicability*, *accessibility* and *function* were used with the historical discourse analysis criteria (Reisigl & Wodak, 2009), the text descriptors, data domain areas and major historical epochs to identify selected data sources for analysis. Each policy text identified and chosen was subjected to the same sampling selection criteria process. The researcher, in line with other critical discourse analysts (Fairclough, 2003, 2009; Reisigl & Wodak, 2009; Taylor, 2001),

recognised that this sampling selection process can be time-intensive. However, it functioned to uphold the logic and integrity of this study (Taylor, 2001).

As is shown in Appendices Four and Five, the researcher used the same logic for the *historical dimension* (Australian disability income support system, see Appendix Four) and *comparison dimension* (Basic Income model, refer to Appendix Five). Applying the same rules and data collection techniques assisted in increasing data trustworthiness and confirmability of the findings (Ezzy, 2006; Fairclough, 2000, 2009; Reisigl & Wodak, 2009; Taylor, 2001). The selected data sources were compiled and recorded in tables to contain the textual corpus.

### **Historical dimension (Australian disability income support) textual corpus**

Appendix Four contains a list of the main sources of all of the documents collected in the textual corpus for analysing the *historical dimension* (Australian disability income support system). The result is three hundred and one documents listed in Appendix Four. Within this appendix are five key textual primary data sources that covered the data domain areas, which included Jordan (1984), Kewley (1980) and Heathershaw (1935)<sup>20</sup> to capture the first two epochs; the Cass Review (Cass, Gibson & Tito, 1988) to capture the third epoch; and Newman (1999), the McClure Report (Reference Group on Welfare Reform, 2000) and the Senate Inquiry into Poverty (Commonwealth of Australia, 2004) for the fourth epoch. Refer to Appendix Four for major epochs with characterising themes (Table 4.1), policy text snapshot (Table 4.2) and the whole set of selected documents. Of these five key textual data sources, all represented primary data sources. The other primary data sources incorporated Parliamentary Hansard (Commonwealth Government), political speeches, government reports, ministerial correspondence by policy commentators and media articles. Secondary data sources, included journal articles, policy articles, and fact-sheets (Fairclough, 2003). (Refer to Appendix Four).

The Jordan (1984) and Kewley (1980) texts were important primary data sources concerning information relevant to the first and second epochs. These two policy documents also provided important secondary data on early Parliamentary Hansard, political speeches (for example Fisher, 1926) and media articles of the time, that the researcher would otherwise have encountered difficulties obtaining. In particular, the researcher used Jordan (1984) to access directly quoted Hansard and directly cited media articles from the first and second

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<sup>20</sup> Heathershaw, J. T. (1935). *The Invalid and Old Age Pensions Act 1908-1935*. Canberra: AGPS. The "Instructions Issued for the Guidance of Deputy Commissioners of 1935" was also known as the 'Brown Book' and outlined guidelines for administration of the Act by Deputy Commissioners.



epochs (for example, excerpts of direct quotes from *The Age*, Melbourne, 16 December 1910) which are contained within the Jordan report.<sup>21</sup>

Although distinctions between primary and secondary data sources can appear somewhat blurred in this study, this is, in fact, misleading. In this study, the researcher has explicitly differentiated between primary and secondary data sources, a key requirement for authenticity identified by Marwick (1970, 2001). Further, the researcher did not use Jordan's (1984), Kewley's (1980) or other authors' (such as Cass et al., 1988) analyses of the data. Rather, the researcher relied on directly quoted Parliamentary Hansard or directly cited media excerpts within these texts that were otherwise unavailable to the researcher. These primary sources contained direct quotations of parliamentary speeches, which in turn became extracts to represent common themes of a particular epoch (Marwick, 1970, 2001). These document sources, that is Jordan (1984), Heathershaw (1935), and Kewley (1980), are highly relevant policy data given that each data source provided primary and secondary data relating to disability income support policy (Fairclough, 2003, 2009; Reisigl & Wodak, 2009). Further, Jordan (1984) and Heathershaw (1935) were considered insiders of social security, having access to specific archival records while Kewley (1980) who was an academic external to the government provided a historical account drawn from direct excerpts from Parliamentary Hansard speeches.

For later epochs, the texts (for example, Cass et al., 1988) were supported by dominant mainstream media document sources, such as state and national broadsheets. The rationale for using broadsheets centred on accessing broadsheets, such as the *Canberra Times* which is perceived to be a progressive newspaper as opposed to popularist tabloid newspapers (Lemke, 1995). The Jordan (1984) and Kewley (1980) texts provided substantial direct quotations that can be used as media excerpts for analysis.

### **Comparison dimension (Basic Income) textual corpus**

Appendix Five contains the list of the data sources compiled in the textual corpus relevant for analysing the *comparison dimension* (Basic Income model). As can be seen in Appendix Five, there are forty-six documents recorded for the comparison dimension (Basic Income). Within Appendix Five are fifteen key policy texts for analysis. Jordan (1984); Kewley (1980); Milner (1920) and Tulloch (1979) covered the first epoch. For the second epoch, the selected texts were the Australian Government Commission of Inquiry into Poverty (Commonwealth of Australia, 1975a, 1975b, the 1975 Henderson Poverty Line); Commonwealth of Australia,

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<sup>21</sup> During data collection and write-up the researcher found that restrictions applied to various manual digital archival media records (such as the *Sydney Morning Herald*). For example, the *Sydney Morning Herald* repository (at the time of write-up) started in 1947, thus limiting researcher access to some data records. Time and cost factors were considered in terms of accessing historical data records (Fairclough, 2003, 2009).

Priorities Review Staff (1975c, “Possibilities for social welfare”); Jordan (1984); Kewley (1980); and Tulloch (1979). In line with the logic used in the historical dimension, the researcher differentiated between primary and secondary documentary sources (Marwick, 1970, 2001). The Jordan (1984) and Kewley (1980) texts represented both primary and secondary data sources. Similar to the historical dimension textual corpus, it was the official Parliamentary Hansard and media direct quotations within these texts which were of interest to the researcher. Given this, the researcher relied on the data contained within the policy texts (secondary data sources), rather than the analyses or discussions advanced by Jordan (1984) and Kewley (1980). In doing so, the rigour and logic of the study could be upheld (Fairclough, 2003; Marwick, 1970, 2001; Taylor, 2001).

The primary data sources for the third epoch comprised the Cass Review (Cass, Gibson & Tito, 1988); the Social Policy Research Centre (1989) Reports and Proceedings; and Victorian Council of Social Service [VCOSS] and Good Shepherd (Eds.) (1995) Conference Proceedings. For the fourth epoch, the sources, Raventós (2007); Standing (2002); Tomlinson (2000a); and Van Parijs (1997, 2000, 2002) were chosen. The Van Trier (1995) text provided useful data spanning each epoch. (See Appendix Five for the complete set of selected documents). During the course of finalising data analysis and write-up, Lo Vuolo and Raventós (2009) and Standing (2009) published documents relevant to Basic Income, which provided significant analytical information relevant to the Basic Income model. In keeping with the same logic within these data sources (such as Standing, 2002), the researcher did not rely on the analyses of these research authors. Rather, it was the data within these text sources as secondary data sources that was of interest to the researcher (Marwick, 1970, 2001).

Similar to the historical dimension, media document data sources, such as state, national and international broadsheets were selected from broadsheets, such as *Waikato This Week* (New Zealand) or the *Green Left Weekly* (Australia), as opposed to popularist tabloid type newspapers (Lemke, 1995). See Appendix Five for major historical epochs with characterising themes (Table 5.1), policy text sources snapshot (Table 5.2) and complete set of documentary sources.

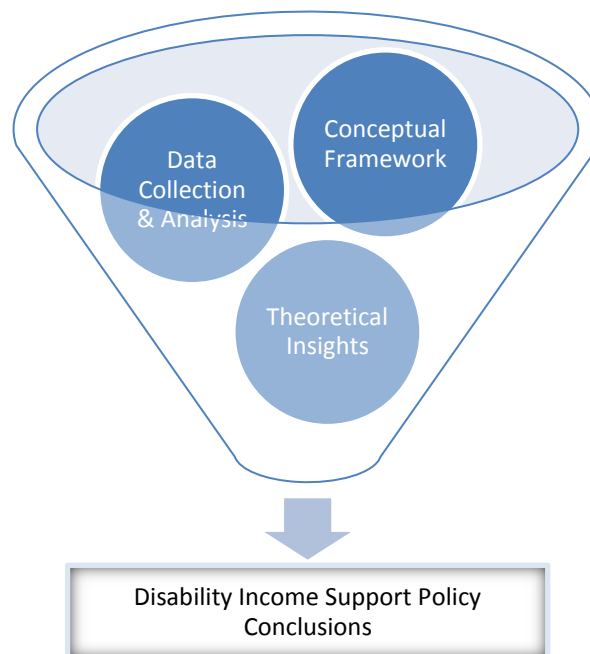
### **Data Analysis**

For the present study, data collation and data analysis represented a dynamic and interactive process involving simultaneously moving between collected data sources, theory (Disability Income Support Analytical Framework) and data analysis (Ezzy, 2002; Fairclough, 2003; Flick, 2009; Miles & Huberman, 1994, 2002; Reisigl & Wodak, 2009). The following section details the data analysis approach used by the researcher, which involves data analysis as part of an iterative process; the use of the Disability Income Support Analytical Framework and critical discourse analysis to guide analysis; analysis part one: thematic

analysis of Australian disability income support policy; and analysis part two: comparison analysis of Basic Income.

### **Data analysis: An iterative process**

Figure 4, informed by Ezzy (2002), Fairclough (2003, 2009), Miles and Huberman (1994), and Reisigl and Wodak (2009), shows the cyclical process of qualitative research (including data collection and data analysis), which occurred in the present study. As can be seen in Figure 4, the development of the Disability Income Support Analytical Framework and critical discourse analysis approach (represented as the conceptual framework), interacted with data collection and analysis and theoretical insights phases. The researcher then engaged in a process of synthesising the data and drawing out meaning from the analysed data. During this iterative process, notations were made for developing file notes, and systematising the data analysis process (Fairclough, 2001a, 2001b, 2003; Flick, 2009; Lee, 2000; Srivastava & Hopwood, 2009). By doing this, the researcher modified emerging concepts and generated higher-order theoretical insights (Charmaz, 2006; Ezzy, 2002; Fairclough, 2003, 2009; Flick, 2009; Srivastava & Hopwood, 2009). Potter and Wetherell (1987) and Taylor (2001) similarly identified the relevance of an iterative process to studies such as this one, particularly given the methodological complexity. These researchers argue that not all coding is clear-cut, but can be cyclical as occurring in this study. The emerging theoretical insights relevant to disability income support policy are depicted in the outcome box below the funnel.



**Figure 4:** Research “funnel” incorporating cyclical nature of the study’s qualitative research process

### **Use of Disability Income Support Analytical Framework and critical discourse analysis to guide analysis**

The researcher started with the Disability Income Support Analytical Framework (generated in Section 3.6), critical discourse analysis (Fairclough, 2003, 2009; Gramsci, 1977, 1996) and major historical epochs to help form connections between emerging concepts and the relevant literature (Ezzy, 2002; Flick, 2009; Hall, 1997a, 1997b, 2005; Hall et al., 1978, 2006; Srivastava & Hopwood, 2009). These guiding approaches operated as inductively derived analytical concepts, and incorporated:

- political ideologies of the welfare state;
- social disability perspective;
- disablist ideology (hegemony) and discourse;
- historical disability dimensions (including pragmatics); and
- collective disability solidarity (rights of citizenship).

Using the Disability Income Support Analytical Framework and critical discourse analysis, the researcher could analyse across both the *historical dimension* (specific epochs: Australian disability income support system) and *comparison dimension* (Basic Income model). Initial codes of the textual data sources were applied to both the historical and comparison dimensions of analysis and incorporated codes according to text author initials and numerical descriptors.<sup>22</sup> Data were analysed paragraph by paragraph within each text (Miles & Huberman, 1994, 2002; Taylor, 2001); therefore, these initial codes helped to track important data patterns across both dimensions (Arapoglou, 2004; Bowen, 2006; Ezzy, 2002; Glaser, 1992a, 1992b, 2007; Glaser & Strauss, 1967; Silverman, 2006, 2009; Srivastava & Hopwood, 2009; Strauss & Corbin, 2008; Taylor, 2001). Potter and Wetherell (1987) support the generation of broad codes in this study's initial phase of data analysis. The analytical concepts were generated inductively as the researcher searched for patterns in language and policy. Although the approach was data driven, links were formed between the findings, the research question and theory (Taylor, 2001). Following this initial step, the researcher identified that thematic and comparison analysis best fitted the nature of the research aim (historical and comparison dimensions).

### **Analysis Part One: Thematic analysis of Australian disability income support policy**

Thematic analysis was used with the Disability Income Support Analytical Framework, and critical discourse analysis method (Fairclough, 2003, 2009; Gramsci, 1977, 1996; Reisigl & Wodak, 2009) to detect historical and contemporary patterns of disability income support policy and properties of discourses within the data (Ezzy, 2002; Taylor, 2001). Themes

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<sup>22</sup> For example, concerning the text by Jordan (1984), the first section on legislative and administrative development was coded AJ1.1.1. Subsequent sections followed a consistent sequential numerical order, as in AJ1.1.2 and AJ1.1.3. Similarly, the ascribed codes applied to other data sources, such as Kewley (1980) which were sequentially coded as TK1.1.1 and TK1.1.2.

relevant to the Australian disability income support system were examined across the major historical epochs. The approach allowed for researcher theoretical sensitivity to the concepts' emerging relationships, which were then checked against the existing data. This iterative process helped to move between analysis and coding for generating early description and interpretation (Potter & Wetherell, 1987; Taylor, 2001). The researcher began the initial examination with descriptive codes (for example, Epoch One, 1908 to 1940, "plight of the invalidism") and then looked at what made plight of the invalid significant, such as paternalistic assumptions associated with the concept of plight of invalidism occurring in Epoch One.

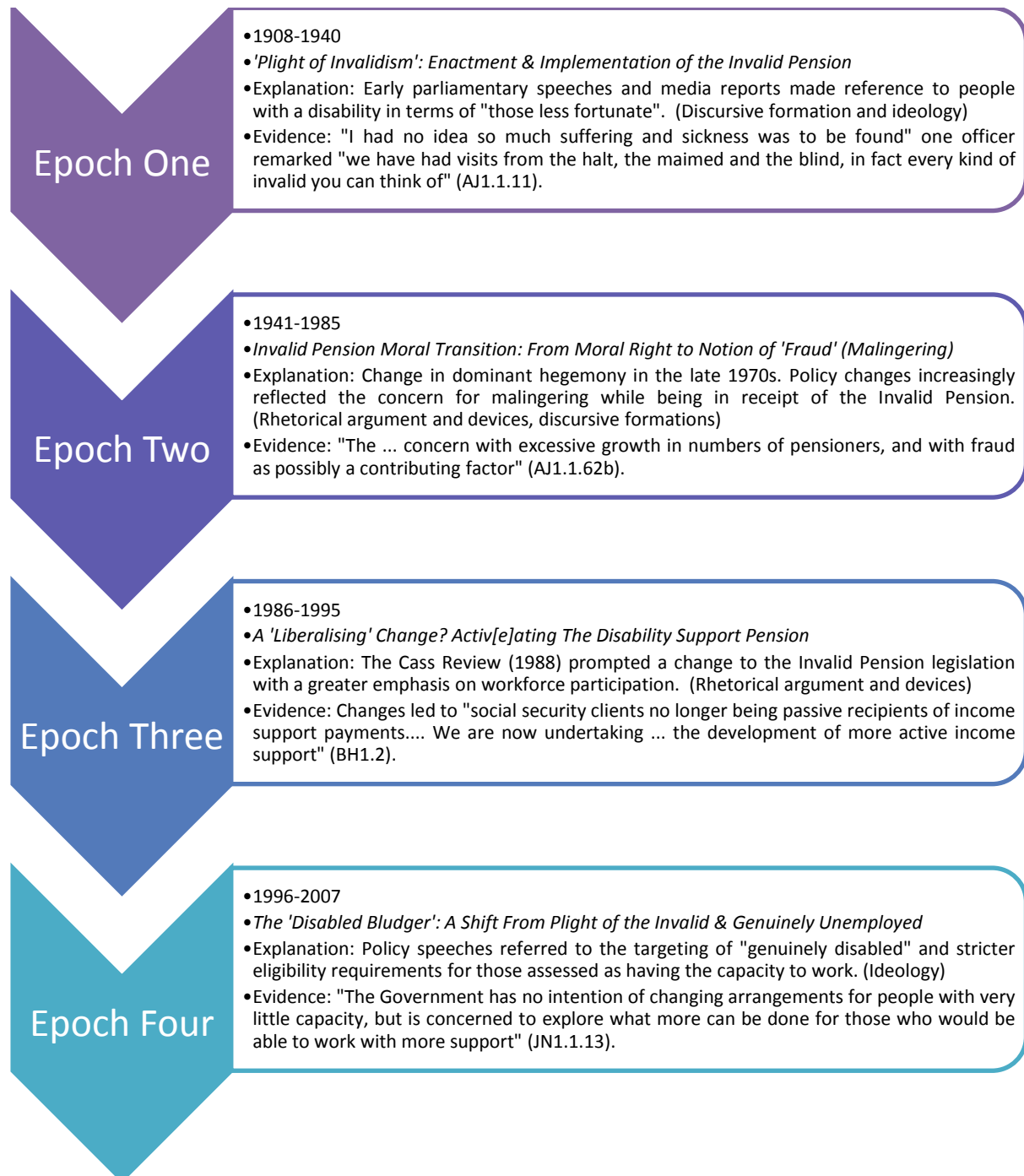
The researcher then looked for instances of emergence and constitution of discourses, discursive formations (which contained devices such as rhetoric, concepts and symbols) and the social relations of power and ideology within policy and media texts. For example, the researcher examined the way the "plight of the invalid" theme was used in early parliamentary speeches to draw support for the implementation of the Invalid Pension. The researcher then searched for rhetorical arguments containing discursive devices to identify the ideological functioning of disability income support policy texts (Fairclough, 1995, 2003, 2009; Lemke, 1995). The researcher also looked for intertextuality (orders of discourse) in policy texts to explore the interrelationship between formations of discourse, social relations of power and social change. Exploring the dialectics of policy discourses helped to locate properties contained within and the meanings attached to the discourses.

From here, the researcher analysed the data for recurring "thematic patterns" within and across each text and corresponding epoch to identify discourse formations and systems of meanings (Lemke, 1995). Each of the policy and media texts was then situated within the social practices of the time (for example, assessing for disability pensions) and the broader socio-political context to bring in the connection between policy and media texts and the structural conditions of the epoch. Thus, the broader socio-political context and ideological assumptions were detailed to capture the structural conditions which influenced and shaped the policy texts and policy outcomes (Fairclough, 2003, 2009; Lemke, 1995). The significance of this contextualisation lies in capturing the way certain words, rhetoric and ideas, such as "malingering", were produced, interpreted and embedded across different epochs (Fairclough, 2003).

From this initial examination, several broad themes emerged in the disability income support policy analysis, which aligned with the designated major historical epochs. The themes were sorted according to chronology (the epoch) and key broad themes (Fairclough, 2003; Miles & Huberman, 1994; Reisigl & Wodak, 2009). A different theme characterised each epoch, representing a significant, yet thematic process. Table 4 below represents the first of the

findings and the characteristics of each epoch, including data evidence to support the finding.

**Table 4 Major Historical Epochs and Emerging Themes Underpinning the Australian Disability Income Support System**



The iterative process, as recommended by Potter and Wetherell (1987), assisted in the amendment and/or reduction of concepts and themes. While Reisigl and Wodak (2009) refer to this process in their research as generating "topics", for this study, the term "theme" is applied in line with Potter and Wetherell (1987). The continual filtering of themes helped to

move beyond initial coding to higher-order theoretical coding (Miles & Huberman, 1994; Potter & Wetherell, 1987; Taylor, 2001), which subsequently led to the emergence of three key themes containing discursive assumptions and social practices of authority, paternalism and disablist ideology. These three themes consistently emerged across each of the epochs, even during instances where they contained differing characteristics. Through the ongoing refinement, the researcher identified sub-themes (detailed in the Introduction to Chapter Four and Chapter Five).

Following refinement of the codes, pattern coding helped to develop a deeper explanation for discerning patterns of connections between events, discourses and structures occurring both within and across each epoch (Miles & Huberman, 1994). Pattern coding also assisted in developing a higher-order explanatory level analysis. For example, the concern for idleness was identified across each epoch, yet it manifested differently within Epoch Four. A connection was found between the reframing of the disability concept and a change in government policy and discourse whereby the tightening of the disability concept helped to legitimise government policy changes in that epoch. Thus, the researcher identified specific rhetorical devices used by governments in power to persuade the population and sell their policy position. In tracing these discursive formations, social relations of power and social practices, such as the concern for idleness, the researcher could identify the points in time in which certain ideologies emerged in one epoch, transformed in another epoch and subsequently became embedded across several epochs (emergence and constitution and recontextualisation) (Fairclough, 2003, 2009; Reisigl & Wodak, 2009).

The researcher looked for discursive formations in extracts to explore the emergence of new representations through signifiers, and the way these representations were recontextualised from one epoch to another, or across several epochs (Fairclough, 2003, 2009). This examination helped to draw out instances of changes to concepts and the way re-contextualisation can operate to entrench ideologies. Searching for discursive characteristics concerning particular policy proposals helped the researcher to explore at a deeper level, what was happening in a particular epoch and what could happen, including the power associated with the orders of discourse and the structuring of social relations (for example, the government and people with a disability) (Reisigl & Wodak, 2009).

Another example of the emerging sub-themes and developing higher-order understanding included the concepts of “genuinely needy” or “active job seeker”. The researcher focussed on references to the concepts of “genuinely needy” or “active job seeker” in parliamentary speeches and policy extracts, such as Parliamentary Hansard or policy texts, as in Jordan (1984). These concepts of “genuinely needy” or “active job seeker”, derived from the data, while not prominent in the early epochs (Epoch One and Epoch Two) were alluded to in the defining criteria of the Invalid Pensions (discursive formation and rhetorical device). It was in

the latter epochs (Epoch Three and Epoch Four) in which the Government directed the disability income support policy targets to increasing the participation of people with a disability in receipt of disability pensions in the workforce (discursive formations and social practices) (Arapoglou, 2004, pp. 106-107; Bessant et al., 2006). The researcher was interested in the properties contained within the concepts of “genuinely needy” or “active job seeker” and associated discourses, to understand how these emerged as a thematic pattern and became a key feature of Australian disability income support policy. In this example, the research revealed the language and rhetorical devices used in disability income support policy, which in turn generated insights into the way the concept of disability was discursively constructed in relation to the ideas surrounding “genuinely needy” or “active job seeker”. These constructions, as Goggin and Newell (2005) suggested, required a “critical gaze” to understand the nature of the discursive construction, together with the site of disadvantage for people with a disability.

During the analysis process, the researcher moved back and forth between themes, sub-themes and concepts, as a form of intertextual comparison, to help search for meanings ascribed to concepts and discourses, and further refine, re-order and at times re-label concepts (Fairclough, 2003, 2009; Miles & Huberman, 1994; Potter & Wetherell, 1987). For example, exploring the Jordan (1984) policy text also required a reading of other policy texts, such as Kewley (1980) and Cass et al. (1988) including extracts from additional data sources (Hansard, social commentaries as with Carney, 1991, or media releases) (Potter & Wetherell, 1987). This data reduction technique also assisted in generating new analytical meaning from the data.

### **Analysis Part Two: Comparison analysis of Basic Income**

In order to maintain logical consistency, the researcher applied the same Disability Income Support Analytical Framework, critical discourse analysis (Fairclough, 2003, 2009; Gramsci, 1977, 1996) and major historical epochs in the comparison analysis of the Basic Income model. As noted in the procedures section on research boundaries (procedures, ii. Comparison dimension: Income support model comparison, p. 61), developing a comparison analysis involved an across time and properties of discourses component to analyse the comparative elements between the Australian disability income support system and the universal Basic Income model. At specific points in time, the Australian Parliament engaged in debates and policy analysis of the potential for introducing a universal income support scheme. Thus, the major historical epochs supplemented the process of engaging with the data to compare both models and generate themes from the data.

The researcher started with broad descriptive codes to help identify relevant themes for comparison (Miles & Huberman, 1994; Potter & Wetherell, 1987). In applying the iterative process for interpretation (Potter & Wetherell, 1987), these codes were further reduced and



refined. Thus, the continual process of comparing the Basic Income data with the Australian disability income support data led to two key themes emerging which revolved around issues of social justice and social citizenship. The researcher used pattern coding to move from a more descriptive account to deeper level explanations for identifying connections between patterns and properties of discourses (Miles & Huberman, 1994, 2002; Taylor, 2001).

From here, the researcher looked for instances of emergence and construction of discourses, discursive formations, rhetorical devices and the social relations of power and ideology. For example, in comparing the concept of social justice between the Australian disability income support system and the Basic Income model, the researcher was interested in the discursive formations and properties surrounding the construction of the notion of social justice and the subsequent implications of the construction within each model in relation to citizenship and disability pensions (Fairclough, 2003, 2009). As the researcher progressed through the comparison, attention was paid in the extracts to the rhetorical devices that each model presented in relation to the themes of social justice and social citizenship. For example, the coding incorporated discursive properties of “freedom” and “decency” and associated characteristics in relation to rights of social justice and citizenship.

The emphasis on these two overarching themes of social justice and social citizenship derived from the readings of the policy texts and parliamentary speeches which grounded the themes in terms of arguments on income support and rights. Discursive formations were examined in the extracts to reveal the devices used to promote particular policy positions and ideological positions. This examination assisted the researcher to identify areas of correspondence between chronological lines, together with concepts (such as social justice), including the points of divergence (Reisigl & Wodak, 2009). For example, each model uses a particular discursive rhetoric (such as a moral or ideological framework) to garner support for their approach. This rhetorical device can be identified in policy claims such as “we will decide who receives income support and who doesn’t” (Taylor, 2001). Examining and coding these discursive formations helped to identify the way governments and policy writers frame their arguments discursively and ideologically (Fairclough, 2003, 2009; Taylor, 2001).

The researcher searched the data and compared each model for the forming of new representations including the way representations were discursively contextualised and recontextualised across different epochs and across each model. Using Fairclough’s (2003) recommendation, the researcher then examined the extracts to identify the change strategies proposed by each model to detect their discursive characteristics and the implications of the proposed change.

Further refinement and re-labelling of the discursive properties and concepts generated three-sub-themes underpinning each of the two key themes of social justice and social

citizenship. These sub-themes operated counter to the identified themes in the analysis of the Australian disability income support system. The sub-themes were further subjected to reorganising and relabelling to help develop deeper meaning (Fairclough, 2003, 2009; Miles & Huberman, 1994, 2002; Potter & Wetherell, 1987). (The two themes and sub-themes are displayed in a table at the front section of Chapter 7). This process also operated as an intertextual strategy to help the researcher shuttle back and forth until no new meaning could be generated (Miles & Huberman, 1994, 2002; Reisigl & Wodak, 2009; Taylor, 2001).

Table 5 below presents a snapshot of the findings relevant to the Basic Income model comparison and data evidence to support the finding.

**Table 5 Emerging Themes Underpinning Basic Income Model Comparison**

<p><b>Social Justice</b></p>	<ul style="list-style-type: none"> <li>• Explanation: In Basic Income, social citizenship is defined in terms of a basic right to income security.</li> <li>• Evidence: "Everybody needs a sense of basic security ... to function rationally, ... be responsible, and ... develop competencies" (GS1.91). (Discursive formation and signifier/genre)</li> <li>• Comparison: This social justice principle contrasts with the Australian targeted model, which suggested social justice with conditions attached (Active disability income support policy) (Ideology and structure)</li> </ul>
<p><b>Distributive Justice</b></p>	<ul style="list-style-type: none"> <li>• Explanation: Distributive justice is reflected in the egalitarian principles, and seeks to provide income security to all people.</li> <li>• Evidence: "Little is said about the need to revise the policies ... that distribute income and the right to an income. This is where BI [Basic Income] comes in as a rational policy for distributing income in a more ... egalitarian way to people" (LVR1.3). (Rhetorical device and signifier)</li> <li>• Comparison: Under the Australian model, provision of disability income support was to only the genuinely needy or genuinely disabled. (Discursive formation)</li> </ul>

An example of the iterative process for Basic Income model comparison analysis is evident in the interpretation of the analytical concept, collective disability solidarity (rights of citizenship). Using collective disability solidarity (rights of citizenship) as a guide assisted in detecting discursive formations, signifiers and orders of discourse including instances in which the principle of social citizenship was applied in relation to Basic Income model and how this translated into policy. The data was then read against the Australian disability income support policy approach to understand the treatment of the citizenship principle.

The researcher also looked for the rhetorical devices and the ideology and structure of policy texts and Hansard to detect the way the accounts were framed in terms of rhetorical elements, including the way particular realities or interests were reproduced. Thus, the researcher was interested in identifying orders of discourses to detect the construction of

truth claims associated with each model and the way these potentially supported dominant interests and became the dominant worldview (Fairclough, 2003, 2009). Ideological and discursive discrepancies in the properties of discourses and the use of the principles across the two models emerged and became an important theme for deeper exploration and subsequent explanation.

Further deep level scrutiny during analysis of the data extracts generated several intellectual challenges relevant to the Basic Income model and its potential significance to the Australian context. Detecting these complexities and discursive formations from the data helped to examine the implications of the challenges and the way these can restrict or promote disability income support policy alternatives.

### **3.4 Issues of Research Integrity**

Throughout the duration of the present study, the researcher sought to uphold the integrity of the research by ensuring the management of ethical considerations and rigour. Appendix One provides greater detail of the issues surrounding research integrity relevant to this study.

#### **Ethical considerations**

Ethical concerns relating to the critical historical-comparative policy analysis methodology and the critical discourse analysis method used in the present study are similar to other qualitative policy and discourse research techniques involving policy texts (Fairclough, 2003, 2009; Reisigl & Wodak, 2009; Taylor, 2001). Sensitivity to maintaining the integrity of the research project was critical to the present study. In using textual data sources, the researcher drew on existing publicly available policy texts or transcribed data (for example, Parliamentary Hansard) as the key data source (Fairclough, 2003, 2009; Taylor, 2001). The use of textual data sources is distinctly different from gathering data through in-depth interviewing involving human participants (Fairclough, 2003, 2009; Flick, 2009; Taylor, 2001). Therefore, although ethical clearance in the form of a low-level application was sought from the Queensland University of Technology, University Human Research Ethics Committee (UHREC), the Committee noted that approval was not required given that data collection procedures involved collecting publicly accessible documentary sources, not the “participation” of humans.

In this study, the findings chapters have data displayed as thick descriptive extracts. The data was presented as italicised extracts contained in quotation blocks. For this study, the extracts become illustrative examples which are then summarised, explained (explanation of the findings) and justified by the researcher (Taylor, 2001). The extracts are supported by a

reference to identify the author of the text and help the reader refer back to the data source within the policy, media or alternative text.

Appendix One comprehensively details the safeguards used in this study to uphold the trustworthiness of critical historical-comparative policy analysis methodology and critical discourse analysis method. These ethical considerations assisted in strengthening the rigour of the present study in which the researcher sought to uphold the research trustworthiness, credibility and data dependability.

## **Rigour**

As with other qualitative studies, using critical historical-comparative policy analysis and critical discourse analysis (Taylor, 2001; Wodak & Meyer, 2009), the key concern for the present study centred on maintaining research trustworthiness, credibility and data dependability, rather than a focus on “pure objectivity” (Ezzy, 2002; Fairclough, 2001a, 2001b; Flick, 2009; Howarth, 2002; Taylor, 2001). Debates on research rigour have been explored by critical discourse analysis researchers, such as Fairclough (2003, 2009), Taylor (2001) and Wodak and Meyer (2009). Appendix One provides greater detail on the strategies used to uphold rigour in this study. Most notably, the researcher responded to potential criticisms of selective influence by using the strategies proposed by Fairclough (2003, 2009) and Wodak and Meyer (2009). The researcher developed quality explicit criteria for use during the sampling selection process (see Table 3 and Reisigl and Wodak, 2009). Triangulation provided a means to ensure the validity of the study, and to align the historical dimension of critical discourse analysis with the comparison dimension (Denzin & Lincoln, 2005; Taylor, 2001; Wodak & Meyer, 2009).

## **3.9 Chapter Conclusion**

Identifying the historical and ideological implications of the Australian disability income policy approach and the relevance of an alternative Basic Income model required a sound research design. The research design methodology is outlined in Appendix One. The critical historical-comparative policy analysis represented the means to conduct an *historical dimension* and *comparative dimension* disability income support policy analysis.

The approach to critical discourse analysis in the study was based on Fairclough’s (2003, 2009) inclusion of the social dimensions of discourse analysis and Gramsci’s (1977, 1996) understanding of the hegemonic consequences of policy discourse. The chapter provided a justification and rationale for the procedures used (developing research boundaries; strategies to access documents: manual and online digital techniques with text descriptors; purposive sampling domain areas of texts for data collection) for examining disability policy language in the construction of disability income support policy. In this critical exploration the Disability Income Support Analytical Framework, relevant for the study of both the Australian

disability income support system and the Basic Income alternative was conceptualised. Thus, the Disability Income Support Analytical Framework, critical discourse analysis and major historical epochs provide the nexus for the dimensions of policy analysis (*historical dimension* and *comparison dimension*). Particular attention was paid to the research integrity in terms of the ethical considerations and research rigour to uphold the quality and trustworthiness of the study.

The following chapters (Chapter Four and Chapter Five) detail the findings from the thematic and comparison analysis of the Australian disability income support system from 1908 to 2007. An introductory section sets the context for Chapter Four and Chapter Five and gives an overview of each of these two chapters.



## INTRODUCTION TO CHAPTER FOUR AND CHAPTER FIVE

### Tracing the History of the Australian Disability Income Support System, 1908 to 2007: The Emergence of the Disabled Bludger Construction

#### Introduction

Chapters Four and Five present the findings from the analysis of the history of the Australian disability income support from 1908 to 2007. The data were analysed in line with each of four major historical epochs using critical discourse analysis and the Disability Income Support Analytical Framework. Chapter Four describes the findings from Epochs One and Two. Chapter Five details the findings from Epochs Three and Four. The historical constructions and discourses of the disability income support system within each epoch are examined (For example, the emergence and constitution of discourses, discursive formations, rhetorical devices and social relations of power and ideology). Within each epoch a descriptive chronology of events surrounding the enactment and administration of disability income support and the policy trajectory involving important periods of discursive and social change that impacted upon the disability income support system are provided.

Table 6 summarises the major historical epochs and the emergent themes characterising each.

**Table 6 Major Historical Epochs and Distinctive Characterising Themes**

Epoch One	<ul style="list-style-type: none"><li>•1908-1940</li><li>•'Plight of Invalidism': Enactment &amp; Implementation of the Invalid Pension</li></ul>
Epoch Two	<ul style="list-style-type: none"><li>•1941-1985</li><li>•Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)</li></ul>
Epoch Three	<ul style="list-style-type: none"><li>•1986-1995</li><li>•A 'Liberalising' Change? <i>Activ[e]</i>ating the Disability Support Pension</li></ul>
Epoch Four	<ul style="list-style-type: none"><li>•1996-2007</li><li>•The 'Disabled Bludger': A Shift From Plight of the Invalid &amp; Genuinely Unemployed</li></ul>

Throughout each epoch, the following themes emerged from the data:

- i. *Commonwealth authority: Power of the State to intervene and control of people with a disability,*<sup>23</sup> coupled with
- ii. *Conservative paternalism discourse involving charitable and punitive values,*<sup>24</sup> and resulting in
- iii. *Ideology of disablism and disablist discourse.*<sup>25</sup>

The Commonwealth authority discourse operates in conjunction with conservative paternalism to portray the government as the omnipotent body who will look after people with disabilities. This paternalism is depicted in the often repeated ministerial statement “*we assist everybody in need*”. Conservative paternalism is exercised through the Commonwealth authority. These elements, in turn, function with the ideology of disablism to control and regulate the behaviour of people with a disability. The ideology of disablism is a form of hegemony which reflects the consequence of disability as oppression, in part constructed by disablist policies and practices over time (Abberley, 1987; Barnes & Mercer, 2003; Gramsci, 1977). A key consequence of disabling policies is the marginalisation of people with a disability who receive disability income support. Over time, disability income support policy has become a punitive measure driven by those in authority, rather than a measure for addressing need or poverty and contributes to disablism. The purpose of Chapters Four and Five will be to explore these themes.

## **Broad Overview of Each Epoch**

As noted in Chapter Two, the distinctive feature of the Australian income support system is that it is a non-contributory and needs-based entitlement. For much of its history, the disability income support system within Australia has remained somewhat uncontroversial. Often decisions surrounding eligibility tended to err on the side of generosity with many administrators returning to the Collin’s ruling of 1910, which set down generous protocols for the relevant department to follow.

In relation to intent and the need for assistance, there is a continuity of themes relating to the Australian disability income support system including notions of incentives, productivity, dependency and bludgers throughout the four epochs. The Invalid Pension established in legislation, provided a framework for legitimising authority, sanctioned paternalism and coercion. While in Epoch One there is a concern for idleness and malingering, it is in Epochs Two, Three and Four where recurrent attacks on welfare policy become evident. The policy

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<sup>23</sup> Commonwealth authority discourse denotes the enacting legislation, policy and ministerial speeches contained within Commonwealth authority.

<sup>24</sup> Conservative paternalism discourse is taken to signify the ideology underpinning the legislation and ministerial speeches surrounding conservative paternalism.

<sup>25</sup> Although the disability income support system was intended to be an enabling policy, the way it has been constructed results in it being disabling. This is the ideology of disablism.



trajectory changed from Epoch One where assumptions centred on the “*plight of the invalid*” to Epoch Four where the notion of dependency emerged. The policy focus changed from people with a disability reliant on welfare to survive to people with a disability being welfare dependent. Thus, ideological statements were used to construct welfare dependency in terms “*genuinely needy and genuinely disabled*”.

The themes of Commonwealth authority, conservative paternalism and the ideology of disablism are examined in greater detail across each epoch. Table 7 presents a summary of the themes of Commonwealth authority, conservative paternalism discourse and the ideology of disablism along with the corresponding sub-themes emerging across the four epochs.

**Table 7 Summary of Identified Sub-themes Characterising the Themes Across the Four Epochs**

THEMES	EPOCH ONE 1908-1940 <i>'Plight of Invalidism': Enactment &amp; Implementation of the Invalid Pension</i>	EPOCH TWO 1941-1985 <i>Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)</i>	EPOCH THREE 1986-1995 <i>A 'Liberalising' Change? Activ[e]ating the Disability Support Pension</i>	EPOCH FOUR 1996- 2007 <i>The 'Disabled Bludger': A Shift From Plight of the Invalid &amp; Genuinely Unemployed</i>
<b>COMMONWEALTH AUTHORITY</b>	<ul style="list-style-type: none"> <li>➤ New powers afforded to the Commonwealth</li> <li>➤ Commonwealth authority and the regulation of people with a disability</li> <li>➤ Commonwealth authority and invalid citizen</li> <li>➤ Un/Productive citizen and permanently incapacitated for work</li> </ul>	<ul style="list-style-type: none"> <li>➤ Broader political context: Shaping a national welfare scheme <ul style="list-style-type: none"> <li>➤ Securing unquestionable authority: Looking out for the poor unfortunate invalids</li> </ul> </li> <li>➤ Control in changing Invalid Pension eligibility criteria</li> <li>➤ From most needy citizen (1949-1971) to social citizen with conditions attached (1972-1975)</li> <li>➤ Compliant invalid citizen: Economic fundamentalism creeps in</li> </ul>	<ul style="list-style-type: none"> <li>➤ Broader political context: Limiting disability income support expenditure</li> <li>➤ Commonwealth authority and the social justice ruse</li> <li>➤ Invalid Pension as a disincentive to work: From entitlement and “workforce incapacity” to proving capacity</li> <li>➤ An enabled active citizen: Emphasising labour market potential</li> </ul>	<ul style="list-style-type: none"> <li>➤ Broader political context: Targeting disability income support</li> <li>➤ Commonwealth authority and the regulated disabled citizen: “Breaking the shackles of welfare dependency” <ul style="list-style-type: none"> <li>➤ The hidden unemployed theme</li> </ul> </li> <li>➤ Tighter eligibility requirements: “Partial capacity to work” <ul style="list-style-type: none"> <li>➤ “Incentive by punishment policy” and the “mean-spirited crackdown”</li> </ul> </li> <li>➤ Compliance and regulation: Adding administrative complexity to disability income support</li> </ul>
<b>CONSERVATIVE PATERNALISM</b>	<ul style="list-style-type: none"> <li>➤ Conservative paternalism and “charitable dole”</li> <li>➤ Categorical eligibility: Invalid Pension is not an assumed right</li> <li>➤ Moral right: Claimants need to “be deserving of a pension”</li> </ul>	<ul style="list-style-type: none"> <li>➤ Conservative paternalism, helpless dependents and “permanently unemployable”</li> <li>➤ Real need and incentives: Invalid Pension as stifling the motivation of invalids to work</li> </ul>	<ul style="list-style-type: none"> <li>➤ “Moralizing discourse”: Preventing the dependency of the disabled “habitual malingerer”</li> <li>➤ Conservative paternalism and disablist language: Reifying dysfunctions</li> </ul>	<ul style="list-style-type: none"> <li>➤ Conservative paternalism and genuinely worthy of a disability pension</li> <li>➤ Moral condition: Disability income support as an “earned right”</li> <li>➤ From a “Fair Go” to “Having a Go”: Reframing genuinely looking for work</li> </ul>

	<ul style="list-style-type: none"> <li>➤ Conservative mistrust: Concern for idleness and the burden of dependence</li> </ul>	<ul style="list-style-type: none"> <li>➤ Conservative mistrust: Inadequate invalids and the reputable Invalid Pension</li> <li>➤ Genuinely needy, the undeserving invalids and genuinely looking for work</li> </ul>	<ul style="list-style-type: none"> <li>➤ “New medicalised criteria” and the punishment of disability pensioners</li> <li>➤ Counter discourse to the enabling disability policy</li> </ul>	<ul style="list-style-type: none"> <li>➤ Reclassifying disability: Job ready and capable</li> </ul>
<b>IDEOLOGY OF DISABLISM</b>	<ul style="list-style-type: none"> <li>➤ “Pensionable incapacity” construction and Invalid Pension conditionality</li> <li>➤ Language of plight of invalidism and charitable motivation <ul style="list-style-type: none"> <li>➤ Earned income as an act of charity</li> </ul> </li> <li>➤ Disabling distinctions: The Invalid Pension and Blind Pension anomaly</li> </ul>	<ul style="list-style-type: none"> <li>➤ Crackdown on Invalid Pensioners</li> <li>➤ Language of “fraud” and malingering</li> <li>➤ “Permanent meant just that”: Targeting the most genuine invalids</li> </ul>	<ul style="list-style-type: none"> <li>➤ Language of social justice as a means to soften the blow</li> <li>➤ The active society rhetoric as disabling</li> <li>➤ The burden of non-productive citizens: A most disabling practice</li> </ul>	<ul style="list-style-type: none"> <li>➤ Productive capacity and the able-bodied worker ideal: Ableness as a condition of citizenship</li> <li>➤ Language of genuinely disabled and the disabled bludger construction</li> <li>➤ Disability pensioners responsible for their own plight</li> </ul>

## Comment

The subsequent chapters (Chapters Four and Five) explore in greater detail the themes and sub-themes underpinning the Australian disability income support system over time.

## CHAPTER FOUR

### Epoch One: Plight of Invalidism and Epoch Two: Invalid Pension Moral Transition

#### 4.1 Introduction to the Chapter

Chapter Four describes the findings from the analysis of the Australian disability income support covering Epoch One (1908-1940) and Epoch Two (1940-1985). The findings from Epoch Three (1986-1995) and Epoch Four (1996-2007) are presented in Chapter Five. In the preceding introductory section, three themes were identified which occurred across each of the four epochs, including Epochs One and Two. This chapter starts with these three main themes:

- i. *Commonwealth authority: Power of the State to intervene and control of people with a disability, coupled with*
- ii. *Conservative paternalism discourse involving charitable and punitive values, resulting in*
- iii. *Ideology of disablism and disablist discourse.*

The chapter examines the historical assumptions, discourses and ideological dimensions of the disability income support system within Epochs One and Two. The findings from the data are depicted in terms of a descriptive chronology of the events associated with the plight of invalidism underpinning the enactment and implementation of the Invalid Pension in Epoch One; and the Invalid Pension moral transition (from moral right to the notion of fraud and malingering) in Epoch Two.

#### **4.2 Epoch One - 1908-1940: 'Plight of Invalidism': Enactment & Implementation of the Invalid Pension**

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##### **Introduction**

Between 1908 and 1940, the new powers afforded to the Commonwealth via Federation, along with the Invalid Pension legislation, gave rise to a new Commonwealth authority with new powers by which the Commonwealth could intervene in the lives of people with a disability. Driven by the political agenda of the time, the Commonwealth authority discourse worked in conjunction with the conservative paternalism discourse to entrench the ideology of disablism.

The period between 1908 and 1940 represented a time of relative stability for the Commonwealth Invalid and Old-Aged Pensions Act 1908. The Jordan (1984) and Kewley (1980) texts pointed to the assumption that the principles underpinning the administration of

the Invalid Pension remained remarkably constant from 1908 to the 1980s. The endurance of the principles appeared to be a result of overlaying old provisions with new provisions without addressing problems. This policy and procedural complexity is seen in an extract from *The Age* (Melbourne, 12 Jan 1911) newspaper:

*It is a simple matter for Parliament to pass legislation declaring that invalids be entitled to receive pensions... It is when Ministers and their departmental advisers seek to interpret the law in detail that they come face to face with many difficult problems... It is sufficiently difficult for the Minister and Commissioner to determine what disabilities constitute 'permanent incapacity', but ... complications arise and dissatisfaction is created.* (Cited in Jordan, 1984, p. 17)

Funding for both the Invalid and Old-Age Pensions was derived from general revenue. The postponement of the administration and allocation of money to the Invalid Pension was more a matter of limited revenue, as opposed to a lack of commitment to the provision by the newly formed Commonwealth Government. Hence, although enacted in 1908, administration of the Invalid Pension was not begun until late 1910 (Jordan, 1984, p.15). Thus, although the political will was patent, financial constraints impacted on the timeframe for administration of the Invalid Pension (Kewley, 1980, p.13).

As the Invalid/Disability Support Pension is the main form of income support provision to people with a disability, a secondary framing of policy principles and discourse was identified:

*The task of securing uniformity of interpretation of the statute, not to say rationality, never ended. The central office sent out instructions.... Precedents were indexed and codified.... The development of administrative policy [is underpinned by] ... perennial issues that represent problems inherent in the provision.* (Cited in Jordan, 1984, p. 17)

The policy trajectory represented in this excerpt demonstrates the pervasiveness of the policy principles within Epoch One. The outcomes of these complexities have important implications for disability income support policy, given the propensity for the generation of overly complicated and highly bureaucratised procedures during Epoch One. These bureaucratised procedures result from social practices connected to the emergence and constitution of new discourses and policy processes associated with the enactment and implementation of a new form of income support for people with a disability, that is, the Invalid Pension.

#### **i. Commonwealth authority: Power of the State to intervene and control of people with a disability**

During the early parts of Epoch One, there emerged an assumed responsibility afforded to the Commonwealth to intervene in matters associated with the provision of a national social protection scheme. The sub-themes identified in the Commonwealth authority theme included:

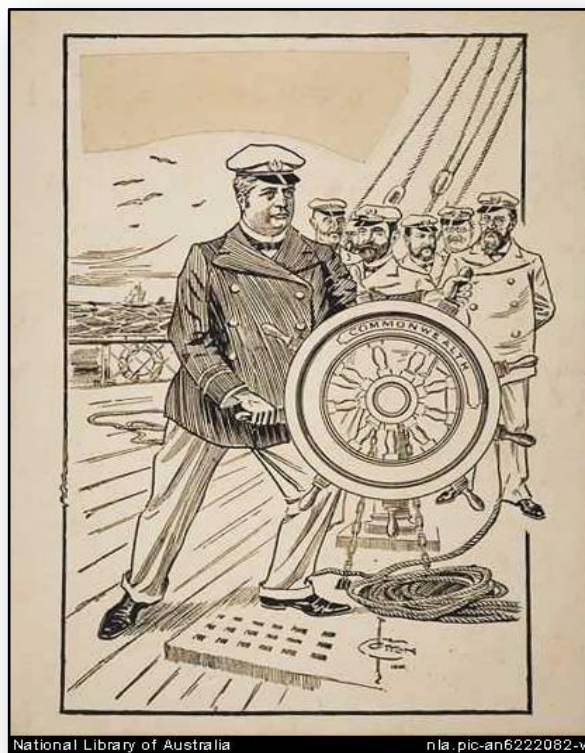
- new powers afforded to the Commonwealth;
- Commonwealth authority and the regulation of people with a disability;
- Commonwealth authority and invalid citizen; and
- un/productive citizen and permanently incapacitated for work.

### New powers afforded to the Commonwealth

The Jordan (1984) report starts with a discourse characterising the moral imperative underpinning the appeal for national disability and old-age pensions:

*Since the latter part of the nineteenth century ... in [Western industrial] ... societies, it has come to seem appropriate for the state to organise pension schemes not only for its own servants but for all citizens. (p. 1)*

Both the political leaders and the public at the time considered that the Commonwealth had a key role and moral obligation in the provision of Invalid and Old-Age Pensions to the “infirm” and “aged”. Figure 5 (entitled: ‘Commonwealth’), provides a significant illustration of the emerging Commonwealth authority discourse underpinning the early part of Epoch One, leading up to the instigation of the Federal Invalid and Old-Age Pensions Act 1908.



**Figure 5:** 'Commonwealth'. Cartoon created by Cotton, H., 1872-1931. Reproduced courtesy of the National Library of Australia: <http://www.nla.gov.au/pict/pic><sup>26</sup>

<sup>26</sup> Cartoon published in 1901.

The new-found authority is depicted in the placement of the text 'Commonwealth' on the wheel, which signifies the connection to Federation. The picture establishes the new position of the Australian Commonwealth as an entity with authority, with an emerging assumed responsibility for the State to intervene in the lives of people with a disability. The Invalid and Old-Age Pensions Act 1908 (Clth) was unique in social policy terms given that it provided a "statutory" response to addressing poverty and represented a unifying entity, as demonstrated in the following excerpt: "[the Commonwealth symbolised] *a new attitude to collective responsibility*" (Cited in Kewley, 1980, p. 7). This notion of collectiveness is depicted in the image of the Captain in the foreground (Prime Minister) and six sailors (State Ministers). Functioning as a legitimising statutory framework, the adoption of the Invalid and Old-Age Pensions represented a significant change in the nature of the relationship between the individual, the Commonwealth and the market. As no social security department existed in 1910, the Treasury Department administered the Invalid and Old-Age Pensions Act 1908 (Clth). This remained the case until 1928 (Jordan, 1984). The significance here is the power afforded to the Commonwealth through normative grammar and imagery as a means of social control and the administration through a Government body (Treasury) to further legitimate the authority (Gramsci, 1977). Commonwealth authority was established as somewhat natural and presented as the dominant unifying language of the nation (Gramsci, 1977).

The period was marked by the Federal Government claiming control of the enactment, implementation and administration of the Invalid and Old-Age Pensions, in contrast to the previously state-by-state based responses. The differential powers ascribed to the Commonwealth and states are exemplified in the Kewley (1980) text: "*the new Federal authority ... known as the 'Commonwealth' government, w[as] assigned certain exclusive powers, [and matters] ... which the Commonwealth could legislate*" (p. 13). Commonwealth authority discourse represents the power of the Commonwealth in exerting greater control over individual states and its citizens, particularly people with a disability.

### **Commonwealth authority and the regulation of people with a disability**

From the beginning of the Invalid Pension, the Commonwealth authority discourse reflected the dominant ideological constructs concerning the need for regulatory measures. The Invalid Pension generated distinctions between people with a disability and the wider populace. The distinctions provided a means for greater control and regulation of people with a disability (Gramsci, 1977). The fact that leaders in positions of power presumed the need for a pension scheme which regulated and sanctioned the behaviour of individuals with a disability constructs the same people in terms of a category group of "other". This is in line with the Poor Law thinking in England during the late 19<sup>th</sup> Century. An extract illustrates the ideological distinctions generated between citizens and groups (such as people with a disability) which aligned with notions of the Poor Laws. Sanborn wrote:

*Its **practice** [emphasis in original] is, that no destitute person, however meritorious, can benefit by this organization without having to pass under something very like the old Roman yoke. On the one side of the Caudine forks, a man [sic] stands erect, self-respecting and respected, and with name unstained; on the other side he crouches, a changed and degraded being. He has become a social pariah, hopes destroyed, spirit crushed, reputation gone. Society, before it yields what it dare not refuse, so embitters the morsel by contempt that neither giver nor receiver is blessed in the act. (Sanborn, 1899, cited in Tomlinson, 2008, p. 39)*

Here, the underpinning assumptions of the Poor Laws indicate that people with a disability required some form of regulation for the greater good of the broader population.

The next excerpt reveals the position of authority afforded to the Commonwealth in regulating the lives of people with a disability:

*[The Commonwealth functioned to] greatly ... extend the reach of the state into the lives of its poorest citizens, to create new relationships of assertion and response, right and obligation and ... to replace former relationships.... The significance of the provisions [is] that they regulated, even disciplined, as well as relieved poverty and ... with their coming, something may have been lost not only of the self-reliance so often mentioned by conservative opponents of non-contributory pensions but also of mutual assistance independent of the state. (Cited in Jordan, 1984, p. 48)*

In this account, the nature of the newly found “authoritarian” relationship is depicted. The account captures the emergence and constitution of the Commonwealth authority and the regulation people with a disability discursive theme. It also makes visible the contradiction generated in the introduction of such a social protection measure (that is, poverty relief and consequent regulation). Here, a discursive formation is revealed whereby the social practices used by governments to strengthen Commonwealth authority are presented as logical and common sense. In line with this, the excerpt highlighted the endurance of the underpinning principles relating to the authoritarian nature of the Invalid and Old-Age Pensions exerted by the Commonwealth.

### **Commonwealth authority and invalid citizen**

The Commonwealth authority contributed to the invalid citizen discursive theme by making conceptual distinctions between people with a disability and older persons through categorisation. Until enactment of the Invalid Pension, greater emphasis in Parliament was placed on arguing the merits of an Old-Age Pension. The Kewley (1980) text revealed that during the lead-up to enactment of the legislation (mid 1908) little reference was made to the Invalid Pension in Commonwealth parliamentary speeches. The call for an Old-Age Pension was generally at the expense of the overshadowed Invalid Pension, as this extract shows: “*from the time of the establishment of the Commonwealth in January 1901, old-age pensions found a prominent place in the election platforms of all political parties*” (Cited in Kewley,

1980, p. 13). The discursive frame indicates that early political discussions on the Invalid and Old-Age Pensions Scheme, for the most part focused on older persons. The “prominence” attained by this positioning of older persons in parliamentary debates suggests a naturalising strategy being employed by politicians to support the notion of naturalised rights and entitlements for older people (Gramsci, 1977). This is not an unusual practice. The framing of older persons as having greater rights and entitlements functioned to solidify Commonwealth authority. It further functioned in parliamentary debates and during elections as a means for political parties to garner support and alliance from the general population (Gramsci, 1977).

The Invalid Pension was somewhat of a natural extension because of the perceived moral obligation, as evident in the following parliamentary speech: “[there is a] *‘sense of deep national responsibility to every single unit in the community’*” (Sir Littleton Ernest Groom, the then Commonwealth Minister, Commonwealth of Australia, Parliamentary Debates, 2 June 1908, p. 1678, cited in Kewley, 1980, p. 16, CPD 1908). There nonetheless persisted the view that people with a disability should not be afforded equal treatment with older people. Thus, treatment of the Invalid Pension as a secondary pension contributed to people with a disability being negatively constructed as the “invalid citizen”. This construction generates inferences that somehow people with a disability do not share a similar citizenship status when compared with older persons and the general populace. The construction of invalid citizen has implications concerning the way disability was tied to eligibility classifications within the Invalid Pension. In part, this inference paved the way for the Commonwealth to re-construct disability in relation to productive capacity.

### **Un/Productive citizen and permanently incapacitated for work**

One of the distinguishing features of the Invalid Pension in this epoch was that the categories focused solely on the “permanent nature of disability” and the presumed incapacity or inability for an individual to return to the workforce. The emphasis on permanent incapacity also contained moral requirements and incentives to work. Disability constructions were intertwined with social and economic status. In making the construction of permanent incapacity there are connections among disability, capitalism, labour market and productivity. The regulatory nature of the Invalid Pension was a theme identified across the data set.

The Invalid Pension functioned to generate distinctions between income support and the labour market, even given that it may not have been the original intent of the Act. The following extract provides an example of the emergence and constitution of the delineation process:

*It cannot be said that classification of the population into members and non-members of the full-time labor force was one of the purposes of the pensions scheme, but it had something of that function, a significant one in a period of*



*industrialisation, unionisation and industrial legislation.* (Cited in Jordan, 1984, p. 49)

Here, the discourse reveals the emergence and constitution of the invalid citizen and incapacitated person constructions in terms of socio-economic statuses related to citizenship (Gramsci, 1977, 1996). Despite its original intention, the Invalid Pension did serve to generate stronger ties to the labour market through its categorisations of people with a disability. This is particularly so given the defining dualism of capacity to work/permanently incapacitated for work discourses. An extract demonstrates the dualism of capacity to work/permanently incapacitated for work discourses: *“invalid pensions are not granted simply because of concrete impairment but because the person is thought to be permanently incapacitated for work”* (Cited in Jordan, 1984, p. 8). In this excerpt, the dualism reflects the perpetuation of discursive formations underpinning the categorisation of disability. The medical and moral criteria, determined by those in power at the time, generated constructions of “invalid” as a social status and “incapacitated” as an economic status. Additionally, aligning “invalidism” with productive capacity functioned to change the nature of citizenship. Where invalidism did not appear to share the same citizenship status (as mentioned in the previous theme of invalid citizen), the Invalid Pension functioned to create a new-found citizenship status for people with a disability which centred on a close connection to the labour market and considerations of capacity (Gramsci, 1997, 1996). Thus, the Commonwealth authority, rather than using social constructions, attempted to make links to the market and productive citizenship. An inherent contradiction within this productive citizen construction is the dualism it generates when people with a disability are considered to be unproductive on the basis of being permanently incapacitated for work.

Permanent disability was given a narrow definition, which assumed the static nature of disability. The narrow conceptions of disability failed to take into account any changes in impairment. The presumption centred on the notion that individual impairments were considered measurable and quantifiable, that is, deficiency could be seen as an absolute. The challenge for the Government, administrators and medical practitioners was the fact that social features, for example barriers and discrimination, were viewed as a less precise measure of invalidity. Even when social dimensions were considered, the government in power tended to use absolute measures for categories of disability which focused on personal deficiencies and individual attributes (Oliver, 2009), thereby stigmatising people with a disability. These measures became entrenched and perpetuated categories that are still in current use. However, emphasising individual deficits fails to account for socio-structural implications and gives little consideration to broader socio-economic and labour market features inherent in society.

## ii. Conservative paternalism discourse involving charitable and punitive values

Conservative paternalism discourse operated in conjunction with the Commonwealth authority discourse to maintain control of those who relied on disability income support. This section describes the key sub-themes of conservative paternalism in this epoch, which are:

- conservative paternalism and “charitable dole”;
- categorical eligibility: Invalid Pension is not an assumed right;
- moral right: Claimants need to “be deserving of a pension”; and
- conservative mistrust: Concern for idleness and the burden of dependence.

### Conservative paternalism and “charitable dole”

The relief of poverty through the Invalid Pension drew connections between the notion of “charitable motives” and the perception of an individual’s “helpless conditions”. Few political leaders disputed the assumption that the Invalid Pension was something of a charity measure, even though the Government sought entitlement status for the provision. Some insight into the conservative paternalism discourse is drawn from the then Treasurer’s (E.C.G Page<sup>27</sup>) claim that the Invalid and Old-Age Pension was nothing more than a “charitable dole”:

*Without impugning for one moment the kindly intentions of the Government of the day that passed the present [Invalid and] Old-age Pensions Act ... it would have been very much better considered, without quite so much sentimentality, and with a little more logic. The inevitable result, since it was based upon no intelligent financial foundation, was that it became what is now, a charitable dole, given only to those who cannot live without it. It is as much a charitable institution as the poorhouse or the soup-kitchen.*

*That is the trouble with all these piecemeal methods of relief ... offered by previous governments, both of the States and the Commonwealth. They are all charities or doles. They are based on pity, rather than on logic, on benevolence, rather than on thrift.* (Cited in Kewley, 1980, p. 10)

Here, the then Treasurer E.C.G. Page’s speech captures the consequence of the Invalid Pension as charitable relief. The extract was chosen as it reveals the way the Government is established discursively as the benevolent body charged with the responsibility and obligation to protect people with a disability, thus revealing the conservative paternalism ideology underpinning the Act.

During the 1930s, the increased costs associated with the existing scheme and larger numbers of people receiving the Invalid and Old-Age Pension, led Government concern for

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<sup>27</sup> Page argued for the introduction of a national social insurance scheme adopted by other countries, such as Germany. A similar call for a national disability insurance scheme was recently advocated by the disability movement on the national policy arena (Leipoldt, 2009).

“liability” impacts upon future governments. The then Commonwealth Treasurer, R.G Casey (later Lord Casey), argued for further contributions from employed persons and the Government: “[in doing this, it would] *preserve the dignity of labour, and enable the Government to extend its benevolence ... to a very largely increased number of participants*” (Cited in Kewley, 1980, p. 11). In effect, and quite paradoxically, this speech by R. G. Casey contains discursive formations and values associated with the conservative paternalism discourse underpinning the Invalid Pension. The passage alludes to the worth ascribed to labour where the idea of work is considered as providing a valued contribution to society. In this sense, providing for the deserving poor augments the benevolence of the Government.

In one example cited in Jordan (1984), a concerned family member requested the granting of an Invalid Pension for her brother-in-law with a disability who struggled to subsist: “[he subsists by] *scavenging on the rubbish tip and [getting] hand-outs from relatives and friends*” (p. 188). The family member suggested that given that the brother-in-law had chronic disabling conditions (“*bronchitis*”, “*alcoholism*” and a “*mental incapacity*”), he was therefore “*unemployable*” (p. 188). The Government provided the man with an Invalid Pension. This case highlighted the conservative paternalism discourse underpinning eligibility rulings in which granting a pension remained dependent upon capacity to work and the degree of disability.

These charity and conservative paternalism discourses underpinned debates around the Invalid and Old-Age Pensions. In constructing the Invalid Pension as a form of dole and a benevolent act of charity, the conservative paternalism discourse constructs people with a disability in receipt of the disability pension as people to be pitied. Further, the conservative paternalism discourse underpinning the Invalid Pension establishes the individual misfortune and personal tragedy notions as conventional wisdom. Again this points to the deserving poor ideology.

### **Categorical eligibility: Invalid Pension is not an assumed right**

Although both the Invalid and Old-age Pensions were needs-based entitlements, there existed a fundamental distinction between each pension. For people with a disability, the newly formed relationship between the Commonwealth and people with a disability was regulatory, whereas for older persons the relationship and subsequent payment of the Old-Age Pension was related to rewards and contribution to society. The Invalid Pension was provided only on the basis of measures of disability and criteria of permanent functional deficiencies; that is, the criteria emphasised the permanent nature of disability. In contrast, older persons were seen as having “earned the right to a pension” on the basis that they worked during their life and contributed to society. These discursive formations generating distinctions and containing rhetorical devices are reflected in the discourses of parliamentary speeches. For example, one extract illustrates the social relations of power and ideology:

"[the suggestion is made that the Old-Age Pension is to be] '*granted as a right and not as a charity*' [and to be] *administered sympathetically*" (Parliamentary debates of original Bill of 1908, Kewley, 1980, p. 15). The Government proclaimed that: "*we have always recognised ... that the old-age pension is a right earned by the old people who have worked for and served this country*" (Parliamentary debates of original Bill of 1908, Kewley, 1980, p. 20). Thus, the citizen rights principle adopted by Commonwealth for the Old-Age Pension formed part of Government rhetoric. The frame highlights the emergence and constitution of categorical eligibility and the Invalid Pension is not an assumed right discourse.

For people with a disability, the right to an Invalid Pension was based on the criterion "permanently incapacitated for work", which, in effect, is the principal statutory requirement for eligibility. The discursive formation strategy employed by the Commonwealth in assessing for "permanent incapacity" reflects Gramsci's (1977) idea of bureaucratic centralism. The idea of bureaucratic centralism centres on an administrative practice in which categorical eligibility is determined by evaluating the interface between impairment and other features (for example consideration of the economic climate) (Gramsci, 1977). Thus, people with a disability were classified according to their impairment given that the reliance on categorical eligibility. The next extract similarly reveals the paternalistic concern for categorical eligibility: [the assessment process required] *an appraisal of the patient's ... ability to engage in gainful activity ... in addition to the definite medical factor - permanent impairment*" (p. 6).

The vision held by political figures of the time (such as Fisher and Scullin) during Epoch One formed the initial concrete response to the Invalid Pension that was to endure across the epochs. However idealistic the intention may be, the outcome of these discourses is clear. Not only is there the forging of distinctions between older persons as having earned the right to be deserving of a pension and people with a disability as "dependent invalids", but also older persons were conceptually afforded a privileged status not given to people with a disability. There is no doubting the power these assumptions exerted in constructing people with a disability as less than capable of working. This distinction became embedded in subsequent disability income support policy and continues to remain an enduring principle. For example, most notably, Scullin (1932) reinforced the distinction in his efforts to ensure the principle remained in rhetoric, as seen in this excerpt: "*but the right is there* [for older persons], *and we should not lose sight of it*" (Parliamentary Speech, 1932, cited in Kewley, 1980, p. 20).

### **Moral right: Claimants need to "be deserving of a pension"**

Another condition underpinning the Invalid Pension (similar to the Age Pension) was that the person with a disability needed to be of good moral character. Both the Jordan (1984, p. 18) and Kewley (1980, p. 15) texts drew attention to this moral requirement. An excerpt from the

Invalid Pension 1908 legislation cited in Jordan (1984) demonstrated the moral requirement underpinning the provision. The legislation as shown in the Jordan text specifies that: “[people with a disability applying for the Invalid Pension needed to be] ‘*deserving of a pension*’” (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Jordan, 1984, p. 18). The next extract reveals the moral right and deserving of a pension discourse: “[an Invalid Pension can be denied if the person is found to hold a criminal conviction or have] *deserted their families*” (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Jordan, 1984, p. 18). Of significance is the requirement: “[that the person be] ‘*of good moral character and... sober and reputable*’” (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Jordan, 1984, p. 18). These accounts depict the emergence and constitution of the moral right, claimants need to “be deserving of a pension” discourse.

An example of the power of the rhetorical device and the way discursive formations operate to perpetuate conservative paternalism can be seen in the Commonwealth Government policy document by Heathershaw (1935). The qualification was similarly adopted by and incorporated into the Heathershaw (1935) instruction to Deputy Commissioners, as demonstrated in the following extract:

[Although] *not an essential qualification for an Invalid* [emphasis in original] *pension ... if the Deputy Commissioner is of opinion that an invalid pension should be refused on the ground of character, or ... that the claimant is not deserving of a pension* [then a case for rejection of the claim could be instigated]. (p. 10)

These illustrations show that the conditionality requirement harks back to the English Poor Laws and even the Statute of Labourers 1348<sup>28</sup>, which defined people in terms of their capacity to participate in the labour market and notions of deserving/undeserving poor (Handler, 2002, p. 54).

In a similar vein, the requirement of sobriety, found in the Invalid Pension legislation (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Jordan, 1984, p. 18), was considered an important moral condition for receipt of the Invalid Pension. Yet, the issue of alcoholism tended to be somewhat of a conundrum in determining whether alcoholism represented an eligibility requirement for the Invalid Pension. In short, the core concern centred on whether alcoholism constituted a “pensionable disability” (Cited in Jordan, 1984, pp. 87-88). The moral right, claimants need to “be deserving of a pension” discourse is found in the extract: “[some individuals were found to be] *apparently able to work when not intoxicated*” (Cited in Jordan, 1984, pp. 87-88). Not only does the discursive formation in the requirement provide punitive justification for not granting a pension, but also the imposition of behavioural conditions and expectations around being a good productive citizen. These notions are included in the Invalid Pension original eligibility requirement whereby the

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<sup>28</sup> The Statute of Labourers 1348 proclaimed it to be illegal to give “*alms to sturdy beggars*” (Handler, 2002, p. 54, Footnote No. 217).

requirement specified that a “*claimant be 'deserving of a pension'*” (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Jordan, 1984, p. 18). This extract detailing the moral requirement, “deserving of a pension”, captures the social relations of power and ideology underpinning the conservative paternalism discourse attached to the Invalid Pension (Gramsci, 1977). An excerpt from the Heathershaw (1935) text similarly captures the implication in the instruction: “*it is considered undesirable to grant pensions to persons who ... solicit contributions in the streets.... If the claimant undertakes to ... give up street begging, a pension **may be** [emphasis in original] granted*” (p. 20). In these extracts, the requirement is presented as logical and appropriate based on a normative category designed to set the moral code surrounding who is deserving of the Invalid Pension. Thus, implicit within this assumption is the generation of boundaries concerning what is considered appropriate moral standards of behaviour.

Several case excerpts in the Jordan (1984) text revealed moral judgments made about eligibility for the Invalid Pension. The granting of pensions in these instances tended to be based on whether the individual was considered deserving or not deserving of a pension. The following extracts of these cases were selected because they demonstrated the moral judgement attached to pension eligibility determinations:

*John W (1939) was permanently incapacitated for work but he 'has been addicted to drink over a long period', and refusal of pension was contemplated on the ground that he was not deserving ... [In the case of] Edward R, also in 1939, the claimant had a long record of convictions for drunkenness, disorderly conduct and resisting the police. Pension was granted 'conditionally on his entering an institution and arrangements were made for his admission to Lidcombe State Hospital'. Richard Mc C (?1939) [sic] suffered from deafness and alcoholic dementia, and pension was again granted on the condition that he enter and remain in an institution: 'Claimant was advised that if he left... payment of the pension would be discontinued.'* (Cited in Jordan, 1984, pp. 87-88)

The discursive formations central to conservative paternalism and the moral right discourse were similarly found in parliamentary debate, as this extract shows:

[The then Opposition Parliamentary Member, Australian Labor Party, Curtin stated that] ... *there is a vast distinction between "permanently unemployable" and "permanently incapacitated" which should be obvious. It hardly is, or could be when the unemployability had to be 'by reason of physical or mental disablement'.... [Another Parliamentary Member, Hughes said that] 'We are sailing on an uncharted sea ... It is obvious that, in dealing with men who claim to be permanently unemployable, we shall not be dealing with facts easily established, such as age or disease. The qualifying condition "unemployable" is difficult to define and certainly not easy to establish.'* (Commonwealth of Australia, Parliamentary Debates, 29 November, 1935, pp. 2234, 2238, 2239, cited in Jordan, 1984)

Although the provision “to be of good moral character” found in the Invalid Pension legislation was eventually repealed in 1974, the very fact that it persisted for over 60 years

demonstrates the entrenched moral judgements attached to determining the eligibility of the Invalid Pension. The discursive framing of the requirement “deserving of an Invalid Pension” and the moral conditions attached to the condition demonstrate the emergence and constitution of the conservative paternalism discourse attached to eligibility criteria.

### **Conservative mistrust: Concern for idleness and the burden of dependence**

The conservative paternalism discourse underpins the concern expressed by governments that “Invalid Pensioners” were malingering and idle. Political leaders, administrators and general practitioners tended to adopt a stance of “conservative mistrust” in the provision of the Invalid Pension. In part, this suspicion derived from the perception that the payment was overly generous and the belief in the propensity for people with a disability to take advantage of the payment. The discourses of “reasonable or exceptional efforts” and “capable of earning a living” were used as rationalisations for decisions about granting the Invalid Pension. This theme can be found in the following extract whereby the then Treasurer Collins (Australian Government, Australian Labor Party) in granting a pension said: *“it is very desirable that such persons, especially when they are young and strong, should be encouraged to try and maintain themselves by their own efforts [and] it is not likely that claimant can get employment”* (Cited in Jordan, 1984, p. 28).

In another case involving a young 21 year old man (Victor, S., 1917) who had one leg amputated, the pension claim was rejected. Conservative mistrust and the concern for idleness discourse are found in an eligibility determination by the then Treasurer Collins:

[Rejection of the pension claim is based the on the grounds that until Victor S provides] *satisfactory evidence that he is unable to learn, or is unfitted for, any sedentary trade... and that he has made reasonable efforts to obtain suitable employment but without success, his case will be further considered.* (Cited in Jordan, 1984, p. 28)

A further case extract highlights the conservative paternalism, whereby in granting a pension to Francis F. A 27 year old who had one arm amputated, Collins stated that *“the loss of an arm is more serious, so far as earning power is concerned, than the loss of a leg”* [however it was] *‘subject to half-yearly enquiry as to earnings’* (Cited in Jordan, 1984, p. 28). Underpinning these determinations was the implicit assumption that if people with a disability were deemed capable of working, then they were encouraged to work and not remain “idle”. The orders of discourse can be seen in an example in which an individual with a disability was repeatedly reported to be malingering (Cited in Jordan, 1984, p. 85). The Commonwealth Medical Review assessment report identified the individual as *“an active person ... [therefore they] should be encouraged to seek a livelihood” (1936)* (Cited in Jordan, 1984, p. 85). This claim was supported in a later report which found that this individual was perceived to be idle and malingering as shown in this extract: *“[individual is] lazy ... does not make an effort to support herself (1937)”* (Cited in Jordan, 1984, p. 85).

These discursive formations highlight the tendency for conservative mistrust in terms of idleness and dependence.

Such subjective value judgements containing rhetorical devices implied that people with a disability require Government intervention because of their behaviour. The discourse suggested that if no incentives to work are built into the eligibility requirements, then Invalid Pensioners are prone to abuse the system. It then becomes clear for the Government that paying a pension to such people would constitute a gross misuse of taxation provided by a sympathetic government and citizens who have contributed to society. The central claim of conservative paternalism is the risk that Invalid Pensioners “rot” the system.

An extract based on data sources from the *Medical Journal of Australia* 1930 and 1934 captured the conservative mistrust language of medical practitioners, displayed to claimants receiving the Invalid Pension. The language constructions in this excerpt highlight the concern about malingering:

*'What are we doing and where are we heading? Is, charity gone stark, staring mad?' asked 'Alas Australia' in a letter to the Medical Journal in 1929, describing two long-term invalid pensioners with seven and eight children respectively.<sup>29</sup> One of the administration's recurring difficulties has been to reach decisions in cases where doctors disagree not simply about degree of disability but as to whether there is any disability at all, one finding only **laziness and malingering** [emphasis added] where another finds a severe psychiatric or even physical condition. (Cited in Jordan, 1984, pp. 135-136)*

This extract demonstrates the reification of conservative paternalism and mistrust through signifiers used to draw further support for regulating behaviours of people in receipt of the Invalid Pension because of the concern for idleness. It also highlighted the diversity of social practices, essentially constructed as contradictions in determinations for Invalid Pension. The moralising discourse is designed to seek support for a coherent approach to eligibility assessment; however, the discourse, grounded in concerns for malingering, undermines any call for universal entitlement to the Invalid Pension (Gramsci, 1977). The discourse reinforces paternalistic assumptions that Invalid Pensioners are not to be trusted, and therefore require regulation by the Government.

The following two extracts were selected on the basis that each case provides a representative exemplar of the conservative paternalism ideology and discourse of conservative mistrust underpinning medical and government administrative determinations:

*[Kathleen N] On first application, in 1936 at the age of 16, she was found to be suffering from 'neurosis and possibly old rheumatic carditis' [rather than a heart condition as was first perceived], and pension was refused ... the local police [argued that she is] 'quite capable of doing some light form of employment' and*

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<sup>29</sup> *Medical Journal of Australia*, 11 January 1930, p. 63 cited in Jordan (1984).



*the C M R [Commonwealth Medical Referees reported that] ... 'with assurance and encouragement... she should be capable of earning her own living.'*

*Edith Z ... Born about 1914 ... claimed pension in 1936.... The C M R [medical examiner stated] ...: 'Appears an active person... Should be encouraged to seek a livelihood' (1936); 'Does not make an effort to support herself' (1937). (Cited in Jordan, 1984, p. 85)*

In these cases, the discursive theme of conservative paternalism and conservative mistrust is demonstrated through the phrasing of being perceived as “capable of earning a living”. Assumptions are made concerning the burden of dependence on the disability income support system. This conservative mistrust construction was also reflected in a later extract from the Jordan (1984) text. The excerpt clearly captured the thinking of the time whereby:

*Paul Dane, probably the 'medical gentleman who does very little else than deal with invalid pension applicants' mentioned by Collins in 1925, agreed with 'Alas Australia' that **the burden of dependence on public support** [emphasis added] was a 'sad business that is sapping not only the wealth of the country but, worse still, the morale of our citizens'.... He had examined about 10 000 claimants, and 'a far greater number ... [demonstrating] subjective symptoms but... no definite sign of organic disease'. (Medical Journal of Australia, 1930, cited in Jordan, p. 136)*

In this account, the presumed generous nature of the Invalid Pension is again called into question through the positioning of “claimants” as misusing the disability income support system, Government and the general population. The formation of discourses identified in the “burden of dependence on public support” construction” (Line three in the Jordan, 1984 excerpt), attempts to swing favour with the general population and contrastingly hold Invalid Pensioners accountable for their assumed reliance on income support. Consequently, this discursive claim, when combined with the metaphor “sapping the wealth of the country” and “morale of our citizens” (Lines four and five in the Jordan, 1984 extract) effectively places the blame of dependence with people with a disability. In turn, this process operates to present people with a disability receiving disability income support as lacking in moral standards. These constructions rely on the assumption that the Commonwealth, medical practitioners and citizens (“other”) are positive contributors to society, given that do not attract any criticism from the commentators. Rather, as a rhetorical device, the power of the assumptions gain strength in the recontextualisation of Invalid Pensioners in terms of being a drain on society and the economy, and therefore to be mistrusted. This discursive theme of conservative mistrust is particularly notable across the parliamentary speeches, media articles and political commentaries.

Concern for idleness and the burden of dependence discourse was exemplified in the *Health Journal* (1934) (Cited in Jordan, 1984). In a letter to the editor, a commentator argued that, “*it is bad for the morale of any member of the community that he [sic] should be branded as permanently incapacitated if by special treatment or training he can be made capable of*

*earning even a small livelihood*" (Cited in Jordan, 1984, p. 136). People with a disability were represented paradoxically as "the sick poor" and simultaneously as "burdens on society", conjuring up images of charity. The use of discursive formations in these examples of parliamentary speeches, journal articles and the media, identified in the above section demonstrates the highly persuasive rhetorical devices used to portray people with a disability receiving disability income support as needing intervention. However, this perpetuated the conservative paternalism discourse in the ongoing suspicion that they are not to be trusted.

The paternalistic concern for malingering and idleness in part underpins the need for incentives. As mentioned, the discourse and rhetorical devices provide the impetus and justification for incentives. In 1910, the maximum rate of the Invalid Pension was set at £26 per annum (10 shillings per week). The following extract showed the incentive implication:

*[The earliest payment rate] was a little under one quarter of the legal minimum wage – the basic wage – which was considered barely adequate to the needs of a family consisting of male breadwinner, dependent wife and two or three dependent children. (Cited in Jordan, 1984, p. 113)*

Tied to the Harvester Judgement, the pension was perceived by political leaders as a supplement to other forms of income and also as a means of compelling people with a disability to seek employment. Thus, setting the payment amount well below the average wage functioned in part as an incentive for people with a disability to seek work and not remain idle on the Invalid Pension. This notion of incentive is revealed in the following extract:

*Over many years ... irregular adjustments to pension rates kept them at about one quarter of the current basic or minimum wage. The administration continued to regard it as reasonable ... for invalid pensioners to supplement pension income, within the imprecisely defined limits deemed to be consistent with the statutory criterion of eligibility.... However, [although changes were made to the Invalid Pension, ongoing issues plagued the administration concerning] ... the person who was neither eligible for pension nor capable of earning a living wage. (Cited in Jordan, 1984, p. 113)*

This example demonstrates the contradiction between introducing incentives for work and the actual capacity for individuals to secure adequate employment or engage in paid work. This illustration also points to the effectiveness of incentive arguments and conservative mistrust discourse in Australian parliamentary speeches and contained within administrative procedures. The power of such claims is reinforced by way of the representation that promotes Invalid Pensioners as capable of working or alternatively as a burden.

### **iii. Ideology of disablism and disablist discourse**

The conservative paternalism discourse together with Commonwealth authority constructs invalidity and disability as the central requirements for receiving an Invalid Pension. It is

these discourses that embed the ideology of disablism. Three sub-themes of the ideology of disablism emerged in this epoch:

- “pensionable incapacity” construction and Invalid Pension conditionality;
  - language of plight of invalidism and charitable motivation: Earned income as an act of charity; and
- disabling distinctions: The Invalid Pension and Blind Pension anomaly.

### **“Pensionable incapacity” construction and Invalid Pension conditionality**

Income support provision in the form of an Invalid Pension was paid to those people with a disability who fulfilled particular eligibility requirements. From the outset, a clear connection was established between the defining criteria of invalid and functional capacity, productivity and charity. Terms applied included: “*functionally determined invalidism*”; “*functional impairment*”; “*plight [of] invalid*”; “*unjustified invalidism*”; and “*pensionable incapacity*”. Clear links were generated between the individual, the labour market, capitalism and the Commonwealth. Thus, distinct features of the Invalid Pension, relating to “original eligibility requirements” (Jordan, 1984, p. 18) were the provisions of conditionality and the connection to productivity and incentives. These discursive formations point to the emergence and constitution of the “pensionable incapacity” construction and Invalid Pension conditionality theme.

“Pensionable incapacity” construction and Invalid Pension conditionality discourses were also found in the requirements for obtaining an Invalid Pension. The key points were the criterion of an individual being over 16 years of age, presenting with an assessable disability that was not manifested on the belief that the individual would automatically receive an Invalid Pension. The discursive formation of “pensionable incapacity” and conditionality can be seen in Invalid Pension 1908 legislation criteria which specified the provision that a pension was paid to people who were assessed as:

*'permanently incapacitated for work, by reason of an accident or... of his being an invalid' ... [where] 'the accident or invalid state of health was not self-induced, nor... brought about with a view to obtaining a pension', ... [and] 'he has not... deprived himself of income or property in order to qualify for a pension' and 'his relatives ... do not adequately maintain him' (ss 20, 22). (Commonwealth of Australia, Parliamentary Debates, 3 June, 1908, p. 11922, cited in Jordan, 1984)*

These and other conditions targeted the Invalid Pension to those persons considered most deserving of a payment. The clause that a person “*must be of Australian descent or holding residency of five years or more*”, found in the Invalid Pension 1908 legislation, incorporated an exclusionary clause that prohibited particular groups from claiming the Invalid Pension, as revealed in the statement: “*overseas born 'Asiatics', and 'Aboriginal natives' [sic] of Australia*” (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Kewley, 1980,

p. 15). These discursive frames functioned to solidify the “pensionable incapacity” construction.

Another significant deterrent clause stipulated that the impairment was not “*self-induced*” (Commonwealth Invalid & Old-Age Pension, 1908, s31(1)), cited in Jordan, 1984, p. 116). This discursive theme is an example of the way paternalism and the sanctioning of behaviour perpetuated the ideology of disablism. The clause also provided a moral justification for the tougher targeting of Invalid Pension recipients through the tightening of eligibility requirements. The following illustration cited in Jordan (1984) highlighted the emphasis the Auditor-General placed on redressing the issue of increased numbers of pensioners and the potential for rorting found during a special inquiry during 1933. The following excerpts revealed the pensionable incapacity construction and justification for Invalid Pension conditionality:

*'as regards [to] invalid pensions ... [there was a] very gross abuse indicating the unreliability of medical certificates as to permanent incapacity for work.... An extraordinarily high percentage of pensions ... were improperly granted or continued.'* (Annual Report of the Auditor-General, 1934-35, cited in Jordan, 1984, p. 116)

The Auditor-General added:

*'during 1934-35, in Victoria alone, 403 invalid pensions were cancelled by reason of the recipients being found, on medical re-examination, to be not permanently incapacitated....To my mind, it is amazing that those responsible for the carrying out of the law have allowed the past lax methods to continue, seeing that the figures show that many thousands of... invalid pensions... are being improperly paid.'* (Annual Report of the Auditor-General, 1934-35, cited in Jordan, 1984, pp. 116-117)

In this account, medical practitioners were required to assess for invalidity status, and certify and guide administrative determinations. The enduring nature of these principles is evident from the next extract. During the 1980s the same original provision of permanently incapacitated for work existed in the Invalid Pension (1908) legislation, that is:

*the claimant be over 16 years of age, 'permanently incapacitated for work or permanently blind', that he became incapacitated within Australia or had resided in Australia for 10 years continuously at any time, that 'his incapacity was [not] brought about with a view to obtaining a pension', and that 'he has [no] enforceable claim against any person, under any law or contract, for adequate compensation in respect of his permanent incapacity.'* (Commonwealth Invalid & Old-Age Pension, 1908, ss 24,25, cited in Jordan, 1984, p. 16)

Clearly, the criteria, particularly, permanently incapacitated for work, were embedded in the Invalid Pension legislation from its inception and remained unchanged until Epoch Three. These examples demonstrate the emergence and constitution of the ideology of disablism through the “pensionable incapacity” construction and Invalid Pension conditionality. Discussions on the nature of the change will be explored in the Epoch Three section of

Chapter Five. The relevance here is the link between disability, productivity and the individual-functional and charity dimensions.

The criterion of permanently incapacitated for work tied to an individual's ability to work is related closely to the medical and individual-functional models of disability where invalidism was considered to be a product of individual dysfunction. The emerging able-bodied and disabled distinctions form part of what Abberley (1987, 1999), Barnes and Mercer (2003), Oliver (2009) and C. Thomas (1999) referred to as the site of oppression in which contributing discourses and practices establish the able-bodied ideal. The notion of "able-bodied normalcy" is dialectically connected to ideology as the presumption becomes entrenched as a privileged status and a universal benchmark against which to assess disability (Abberley, 1987; Barnes & Mercer, 2003; Charlton, 2006; de Poy & Gilson, 2004; Gramsci, 1977, 1996; C. Thomas, 1999). Thus, people with a disability are excluded from the labour market on the basis of perceived deficiency and their attachment to a specifically defined social category grouping (Abberley, 1987; Barnes & Mercer, 2003; Charlton, 2006; de Poy & Gilson, 2004; C. Thomas, 1999). Patently, this reflects the ideology of disablism. These disablist notions became the reference point for policy direction on income support provision, that is, the emphasis on deficiencies (medical, physical and psychological conditions) that prevented participation in the labour market and an individual's capacity to earn a living.

As such, the Invalid Pension was subject to means-testing and eligibility criteria. The following excerpt from the then Treasurer Collins (1925) reports on the process for Invalid Pension eligibility determinations:

*We have a medical staff, which is not a whole-time staff. We have appointed some hundreds of doctors to be our medical referees... Every little town... has a doctor whom we have appointed to be a medical referee. An applicant for an invalid pension must present a medical certificate from his or her own doctor, and then we send the claimant to our medical referee for further examination and report. In the big cities we have several... doctors who act for us.* (Australian Government Report of the Royal Commission on Health, Melbourne, Govt Printer, 1926; Minutes of Evidence, 46-47, cited in Jordan, 1984, pp. 25-26)

Collins added:

*We have very many medical reviews. Sometimes our medical referee, in his report, will say that he recommends re-examination in six months, or twelve months, or perhaps two years... We are not bound by the medical opinion, although, of course, it is our chief evidence. We sometimes find that a man who is certified as permanently incapacitated for work is earning money.*

*We make the most careful inquiries regarding the earnings of every invalid pension applicant... We go to employers and ascertain how many days a man has worked in a particular period, what his pay has been, and whether he has done his work efficiently. We make inquiries from every person we think can help us to understand what is the condition of the man [sic].* (Australian Government Report

of the Royal Commission on Health, Melbourne, Govt Printer, 1926; Minutes of Evidence, 46-47, cited in Jordan, 1984, pp. 25-26)

Central to the above extracts is the premise that medical, individual-functionalist theories and charity theories of disability underpin traditional models of Australian disability income support. Regarding the concept of disability and the way measures of disability were generated and embedded in the policy, the extracts contained within the Jordan (1984) and Kewley (1980) texts exemplified the controversies in making medical determinations and administrative decisions in the presence of socio-economic conditions where people with a disability were experiencing real economic hardship and disadvantage. This discursive theme is exemplified in the evidence given to the Royal Commission on Health (1925) by the then Treasurer Collins (1925) who reported that one case was problematic:

*'It is when a man has lost a limb. If he has been a laborer, for example, the loss of his leg may prevent his earning any livelihood at all, and yet... if work suitable to his condition were brought to him, he could keep himself very well. When we find that a man of low mental power has lost a limb, it becomes a question of whether he is not really permanently incapacitated, and in a very few cases I have taken the responsibility of treating him as such.'* (Australian Government Report of the Royal Commission on Health, Melbourne, Govt Printer, 1926; Minutes of Evidence, 47, cited in Jordan, 1984, p. 26)

It is these interrelating policy, discursive frames and practices concerning measures of disability that perpetuate disablist principles. The notion of disability is constituted as problematic by the Australian Commonwealth Government and media.

Definitions of what constitutes permanent incapacity are difficult to tie down. This claim is demonstrated in data which emphasised the lack of conceptual clarity and theoretical consensus surrounding the medical assessment of what constitutes disability, including the influencing social and economic conditions. The findings revealed that there exists a tenuous theoretical foundation in the evaluation of disability, which generated narrow definitions evident in the Invalid Pension 1908 legislation: “*permanently incapacitated for work or permanently blind*” ... [where] *invalidity is a social status* [and] ... *incapacity for work is an economic status*” (Commonwealth Invalid & Old-Age Pension, 1908, ss 24,25, cited in Jordan, 1984, p. 16). Here, each concept has a connection to individual-functional and medical statuses. The perceived difficulty for the government and administrators in measuring “invalidity” was the concern that the impairment could not always be concretely measured. For example, that data revealed the complexities in measuring intangible consequences such as pain. In these accounts the construction of disability is closely tied to discursive formations based on medical and economic definitions, rather than social definitions. Hence, what emerged was the “pensionable incapacity” construction and Invalid Pension conditionality.

The emergence and entrenchment of disablist notions in disability income support policy during Epoch One, are what Barnes and Mercer (2003) and C. Thomas (1999) described as disability as a social product. The construction of invalidism and exclusion from the labour market contributed to the material disadvantage and “enforced reliance” of people with a disability on disability income support.

### **Language of plight of invalidism and charitable motivation**

The language used by the administration yields an important insight into charitable motivations underpinning the Invalid Pension. An excerpt from *The Age* (Australian newspaper) highlighted the plight of invalidism discursive formation by a Government Administrative Officer:

*‘I had no idea so much suffering and sickness was to be found in a city like Melbourne ... we have had visits from the halt, the maimed and the blind; in fact, from every kind of invalid you can think of.’ (The Age, Melbourne, 16 Dec 1910, cited in Jordan, 1984, p. 17)*

This illustration revealed the charitable assumptions underlying administration of the Invalid Pension. The extract makes visible the disabling assumptions identified in the commentator’s use of a rhetorical device whereby disability constitutes “other” (for example “the halt”). These accounts function to generate assumptions grounded in charitable motivations that being “disabled” is a plight to be overcome. This discourse within the extract highlights the emergence and constitution of disablism pertaining to disability income support.

### ***Earned income as an act of charity***

An often contentious issue for administrators of the Invalid Pension was those people with a disability, who were in receipt of an Invalid Pension, and received a small amount of income for work. The earned income as an act of charity discursive theme was reflected in the arguments about “earning capacity” as opposed to actual income. This was evident in the phrase: “[people with disabilities receiving payment for work] *out of sympathy for his disabilities*” (Cited in Jordan, 1984, p. 32). In many of the cases involving appeals in Epoch One, where the Invalid Pension had been cancelled, decisions were made by the administrators to reinstate the pension based on conservative paternalism in the form of an act of charity, as revealed in the phrases: “*out of charity*”, “*sympathy for his disabilities*” or “*sympathy*” for their “*misfortune*”. Hence, any earned income tended to be viewed as a charitable gift rather than real work, as demonstrated in the following statements: “*proceeds of charity*” or “*acts of charity*” (Cited in Jordan, 1984, p. 32). These assumptions of sympathy, misfortune and acts of charity represented a common theme found across the data set.

Similar policy constructions used incentive arguments to persuade Invalid Pensioners to increase their earning potential and ensure the Commonwealth Government did not impose penalties of those deemed to be making extraordinary attempts toward working. These

representations are captured in the parliamentary excerpt by Government administrators in 1913: “usually we do not grant a pension to a claimant for invalid pension if he earns more than 5s or 6s a week” (Australian Government Report of the Royal Commission on Health, Melbourne, Govt Printer, 1926; Minutes of Evidence, 46, cited in Jordan, 1984, p. 32). The discursive theme of charitable sympathy and act of charity is similarly captured in the following parliamentary excerpt by the then Treasurer Collins (1925) who reported to the Royal Commission that:

*'the invalid pension is payable only to a person who is permanently incapacitated for work. We do not take that expression quite literally, because a **person who is bedridden might be capable of performing a small service** [emphasis added] to others; but we say that a person who is suffering from a serious illness of a permanent character and who does not earn more than 6s, 7s or 8s per week is permanently incapacitated for work.'* (Australian Government Report of the Royal Commission on Health, Melbourne, Govt Printer, 1926; Minutes of Evidence, 46, cited in Jordan, 1984, p. 32)

The following example case of George W., (“a newspaper seller who had lost both legs”) illustrates the underpinning discursive theme of charity discourse. The Acting Commissioner (circa 1910), in noting the earnings of 12s per week by George W., stated that “*his so-called earnings, it seems to me, must be considered largely the proceeds of charity,*” [although this granting of the Invalid Pension was] ‘*subject to review*” (Australian Government Report of the Royal Commission on Health, Melbourne, Govt Printer, 1926; Minutes of Evidence, 46, cited in Jordan, 1984, p. 32). Here, the discursive theme of charity discourse is organised as an assumption of right, that is, some earnings are considered an act of charity, as opposed to the perception that Invalid Pensioners were engaged in so-called real work.

This discursive theme of charity discourse is further evident in another case involving Alfred A. (1919, a 50-year-old man with locomotor ataxia). In this extract, a Parliamentary member drew on charity discourse to provide support for Alfred A., when Alfred had his Invalid Pension cancelled because of perceived excessive earnings (16s per week) “*from the sale of race books*” (Cited in Jordan, 1984, p. 32). The initial granting of the pension was in 1912. The Parliamentary Member stated that “racegoers” supported Alfred A.:

*'through sympathy for him in his misfortune' [and because] 'there is very little actual 'work' attached to the selling of race books and pensioner's earnings are no doubt, to some degree at least, the proceeds of charity.'* (Cited in Jordan, 1984, p. 32)

The discursive formations in the above excerpts relate to determinations using “charitable motivation” language to support the provision of incentives for work. Barnes and Mercer (2003) state that charity assumptions are a form of cultural imperialism, and thus a part of disablism. In these examples, charitable assumptions operated to promote and maintain representations of people with a disability in receipt of disability income support as helpless and dependent (Barnes & Mercer, 2003, p. 26). The rhetoric found in the above extract also



functioned to reinforce the helpless dependent representation of people with a disability in receipt of disability income support.

The data revealed that generating distinctions between forms of employment considered to be an act of charity and the so-called “normal” labour market, devalues and stigmatises people with a disability. For example, perceptions identified in parliamentary speeches centred on forming distinctions between the so-called normal labour market and acts of charity based on conservative paternalism, as indicated in the following phrase: “[an individual was] ‘unable’ to ... *earn a living in the ordinary labor [sic] market*” (Cited in Jordan, 1984, p. 67). If people with a disability are seen to be working alongside so-called able people and working in mainstream jobs and not by charitable motivations, then eligibility for disability income support is called into question. The consequence of this perception is that often the disability income support payment would be cancelled. A media article in 1933 highlights the discursive formation of the charity discourse and notion of “act of charity”:

*‘To the evident surprise of members, the Assistant Treasurer, Mr Casey, announced in the House of Representatives last night that invalid pensioners were permitted, and always have been permitted, to earn a few shillings a week. Members said the news should be published throughout the Commonwealth, because it disclosed a position of which they previously had not been aware.’* (Daily News, Perth, 17 November, cited in Jordan, 1984, p. 91)

The following extract further highlights the charity discourse. The then Treasurer Pearce in a parliamentary debate and responding to the question “‘define the exact amount... pensioners are permitted to earn” stated that:

*‘In order to qualify for an invalid pension a person must be totally and permanently incapacitated for work. Obviously, if a pensioner is able to work, although he may not be able to earn sufficient to make him ineligible for a pension under the income provisions of the law, he is not incapacitated for work. Cases arise, however, where an invalid pensioner receives a nominal amount for performing light services and the pension is not cancelled. It is not possible to state the amount which is allowed to be received under these conditions. It depends entirely on the nature of the service rendered and the circumstances under which the payment is made.’* (Commonwealth of Australia, Parliamentary Debates, 29 November, 1935, pp. 2180, 2181, cited in Jordan, 1984, p. 91)

These excerpts give insight into the way the Commonwealth operated to preserve their authority, yet used conservative paternalism and charitable motivations to portray the entity as compassionate. These disabling discursive formations are threaded throughout the data set and operate as a form of disablism.

The distinction and discursive theme is further embedded in Heathershaw’s (1935) instruction 100 concerning permanent incapacity for work and earnings, as shown in this extract: “*the fact that a claimant is rendering small services for which he [sic] receives a nominal amount in the wa[y] of charity (not exceeding 10/- a week) will not be regarded as*

*inconsistent with total Incapacity*" (p. 46). Women were also eligible for the Invalid Pension only if the household duties being undertaken were "*of a light nature*" (Cited in Heathershaw, 1935, p. 47). The combination of charity, authority and paternalism forms part of the deserving poor ideology (Barnes & Mercer, 2003; Oliver, 2009; C. Thomas, 1999). The plight of invalidism relative to disability income support is constructed within the context of the capitalist economy and as a social problem (Gleeson, 1997, 1999). From this viewpoint, people with a disability in receipt of the Invalid Pension were subject to greater control and regulation than were people without a disability.

### **Disabling distinctions: The Invalid Pension and Blind Pension anomaly**

The Blind Pension policy was influenced by the perceived problem of blind people begging in streets and the public wanting to remove "them" from public view (essentially a hegemonic strategy to get "them off the streets"). Yet at the same time, the issue of "blind beggars" as an "afflicted class" generated greater hegemonic support, as shown in this excerpt: "[blind beggars attracted] *public [and charitable] sympathy than most other disabilities*" (Commonwealth Treasury and the then Commissioner Mr G. T. Allen, cited in Jordan, 1984, p. 50). The key principles centred on fairness and equity: "[the concern was] *how to be fair, and even generous, to this afflicted class*" (*The Age*, 12 January, 1911, cited in Jordan, 1984, p. 53). People who were blind were viewed as being able to participate in the workforce.

The government and public perception of the time suggested that people who were blind, were considered deserving of a generous guaranteed income support pension, if only to remove them from public spaces. This perception was found in the phrases, "*pitiful ... [when] begging alms*" and "*lamentable sights [of the] afflicted class ... of blind beggars ... [and] 'blind paupers [in public streets]*" (*The Age*, 12 January, 1911, cited in Jordan, 1984, p. 50). In part, these assumptions of "lamentable sights" and removing "blind paupers" from public view revolve around an "out-of-sight, out-of-mind" hegemonic device whereby the public are appeased by the knowledge that "Blind Pensioners" are well cared for (Gramsci, 1977).

Figure 6 exemplifies the so-called "*lamentable sights [of the] afflicted class ... of blind beggars ... [and] 'blind paupers [in public streets]*" (*The Age*, 12 January, 1911, cited in Jordan, 1984, p. 50).



**Figure 6:** 'Blind Beggar', Melbourne, Victoria. 'Image courtesy of Vision Australia Heritage Collection'. Available from: <http://www.visionaustralia.org.au/info.aspx>

The notion of desert appears to be invoked in the case of the Blind Pension in terms of Blind Pensioners being considered as more deserving than people with other disabilities. Eligibility for the Blind Pension centred on the universal right of all unsighted people, rather than the categories of deficiencies that underpinned the Invalid Pension. The discourses surrounding the implementation of the Blind Pension Act functioned to create distinctions between different disability groups and engendered notions of desirable/undesirable as a means to maintain hegemonic order (Barnes & Mercer, 2003; Gramsci, 1977; Oliver, 2009; C. Thomas, 1999).

An extract demonstrates the distinction between the Invalid Pension and Blind Pension. The extract captures the specific amending provision made for people who were blind under the Invalid Pension:

*This [amending] legislation of 1912 ... placed blind people who were permanently blind in a different category from other recipients of invalid pensions. Ordinarily, where an applicant was capable of earning an income, he was ineligible for a pension on the grounds that he was not permanently incapacitated for work. It was thought to be unwise, however, to regard blind people as invalids in the sense of being unable to earn any income. Rather, the desire was to provide them with every inducement to earn something towards their support. The*

*Act consequently provided that an applicant who was blind 'shall be deemed to be earning wages equal to the amount which he or she could earn by reasonable effort.'* (Cited in Kewley, 1980, p. 18)

In generating categorical distinctions, there was a further push to afford people who were blind a privileged status. The rhetorical devices are identified in the discussions on privileged status for "Blind People" whereby generating hierarchies of need concealed the censure of "begging". The discursive practice of censorship and hierarchies of need discourse operated as a function of social control. This approach to discursive formation which sets up specific rights and entitlements for people who are blind is demonstrated in the following discourse: "*in 1912 the [Invalid Pension] Act was amended to make pension payable under that condition. [The then Prime Minister] Fisher, introducing the amendment, defended the decision to discriminate between blind and other claimants*" (Cited in Jordan, 1984, p. 55). Statements contributing to the categorical distinctions and defence of the amendment are evident in the discourse by Fisher (1912):

*'I hold that it is better for the community and for the blind persons themselves that they should be trained to work in some occupation, and earn something towards their support. But it is proposed [that] pensions ... be paid to them ... to supplement the wages they receive.'* (Commonwealth of Australia, Parliamentary Debates, 12 December, 1912, pp. 6969, 6970, cited in Jordan, 1984, p. 55)

From this stance it was perceived that people who are blind were capable of working as Fisher's next statement inferred:

*'Blindness is not a physical infirmity in the ordinary sense of the term. A blind person ... is usually able to do something for himself; and the desire is to see that the blind make a reasonable effort to earn their living, and to assist them in every possible way' [to achieve that aim].* (Commonwealth of Australia, Parliamentary Debates, 12 December 1912, pp. 6969, 6970, cited in Jordan, 1984, p. 55)

These illustrations reflect the social relations of power and ideology. Different policy statements promoted hierarchies of need discourse and suggested a higher status for Blind Pensioners than Invalid Pensioners. The disabling distinction can be seen in the categorical distinction discourse of the then Minister Earle: "*I do not think the case of a blind pensioner is quite parallel with that of the average invalid pensioner*" (Commonwealth of Australia, Parliamentary Debates, 13 October, 1920, p. 5532, cited in Jordan, 1984, p. 57). The consistent discursive framing of distinctions in parliamentary debates generated disabling distinctions. These disabling distinctions are a form of mode of regulation to deepen the process of commodification, Commonwealth authority and conservative paternalism. In turn power is transferred from Invalid Pensioners to the Commonwealth authority through paternalistic practices and the enactment of different legislation (Blind Pension and Invalid Pension) (Gramsci, 1977).

Paradoxically, the political leaders and the public perceived people who were blind to be motivated and capable of working as demonstrated in the next extract. Mr Findley (1917) suggested to the Australian Senate in an earlier parliamentary debate, “*those [people who were blind were more likely to] learn useful trades [in blind institutions because of] their desire to be independent*” (Commonwealth of Australia, Parliamentary Debates, 13 February, 1917, p. 10438, cited in Jordan, 1984, p. 57). Given the historical context of the parliamentary debates surrounding the introduction of the Blind Pension and the length of time spent debating the issue the framing of the discussions highlights the critical attention drawn to the “plight” of people who were blind.

An additional discursive frame around capacity to work is found in the parliamentary statement by the then Minister Earle who reported:

*'[People who are blind are] in possession of all [their] ... faculties, except that of sight ... and consequently has the same financial needs as his more fortunate brother' [sic] ... [and] there is no doubt at all as to a blind man's complete invalidity.'* (Commonwealth of Australia, Parliamentary Debates, 13 October, 1920, p. 5532, cited in Jordan, 1984, pp. 57-58)

Here, the assumption is based on the view that Blind Pensioners have no opportunity to remain idle whilst receiving the pension and the fact that the disability is quantifiable and, therefore, undeniable. The end statement by Earle in his parliamentary speech is an example of this assumption:

*'[People who are blind have] no chance of malingering or imposing on the... community. Although it may be difficult to allow the ordinary invalid pensioners to supplement their allowances, because of the possibility of imposition, the blind man has no chance of deception.'* (Commonwealth of Australia, Parliamentary Debates, 13 October, 1920, p. 5532, cited in Jordan, 1984, p. 58)

In this account, disabling distinctions are found in the phrases “possession of all faculties” and “more fortunate brother” whereby the rights of people who are blind are paternalistically established as natural. The power of this discourse lies in the clear distinctions generated among people who are blind and Invalid Pensioners. The argument posits Invalid Pensioners as having the propensity to engage in malingering and, in contrast, present people who are blind as valued citizens who could and would contribute economically to society (Gramsci, 1977). This construction, in turn, shows the emergence and constitution of rights for those people considered worthy and also the disabling distinctions between payments.

An important aspect of this form of disablism is the perception by political leaders (Fisher and Collins), and the public alike that the Blind Pension being an unconditional provision would function as incentivising people who are blind to work. The next extract from a parliamentary debate by then Minister Newland conveys the paradoxical idea that the Blind Pension would operate as an incentive to work: “[when earning capacity is taken into account there is] *'no incentive for these people [who are blind] to earn more than the amount*

*provided under the [Invalid Pension] Act, because they will be penalised if they do so"* (Commonwealth of Australia, Parliamentary Debates, 5 August, 1920, pp. 3264, 3265, cited in Jordan, 1984, p. 57). This clause operates as a moral assertion whereby value judgments are made. The discursive formations in the illustrations perpetuate the hegemonic assumption that Blind Pensioners will not fall victim to malingering and idleness or deception.

In an earlier parliamentary debate, Findley (1917) used the disabling distinctions discourse and incentive principle as a rhetorical device to garner support for the provision of a universal pension for people who were blind:

*'It is a discouragement to make deductions from their pensions in proportion to their earnings... What they can earn, together with the pension, is altogether insufficient to allow them to marry... they cannot earn a living wage.'* (Commonwealth of Australia, Parliamentary Debates, 13 February, 1917, p. 10438, cited in Jordan, 1984, p. 57)

The paradox exists in the reproduction of the conservative paternalism discourse calling for the social control of Blind Pensioners, yet adopting greater empathy for their cause. This is because of the profound belief held by Government and the public that people who were blind were productive citizens, as demonstrated in this extract: *"blind people can and do lead productive and satisfying lives ... [and] they have ... better opportunities to do so than sufferers from many other conditions"* (Cited in Jordan, 1984, p. 76).

Rather than maintain the blind provision as a separate category under the Invalid Pension Act, the Commonwealth Government instigated the Blind Pensions Act 1920. The following excerpt demonstrates the Commonwealth authority and conservative paternalism underpinning the enactment of the Blind Pensions Act (1920). In November 1920, the then Treasurer Cook announced the enactment of the Blind Pension legislation. The statement uses a metaphor to embed conservative paternalism and disabling distinctions: *"[the enactment of the Blind Pension legislation is] a nice little Christmas box [for] the poor, unfortunate blind people"* (Commonwealth of Australia, Parliamentary Debates, 22 November, 1920, pp. 6773, 6774, cited in Jordan, 1984, p. 58).

The advent of the Blind Pension led to distinctions being made between different types of disabilities, thereby generating differences between those people in receipt of the Invalid Pension, and those persons in receipt of the Blind Pension, a distinction which persists to the present day. The debates of the time perceived the Blind Pension to be less costly over time. Public sentiment also supported the call for a Blind Pension. This call is evident in the following extract: *"[there is] a feeling among the public that people ought to be compensated for blindness may historically have supported the pressures for concessions from governments"* (Cited in Jordan, 1984, p. 76). The rhetorical device used by the Government (Fisher) promoted images of blindness, not as an affliction, but as a "conventional image" reflective of mainstream society. Thus, public support favoured the "unfortunate blind

person” at the expense of other people with disabilities. The arguments for the separate treatment of Blind Pensioners contained contradictions based on a combination of authority, paternalism and charity, while simultaneously equating blindness with a privileged status akin to normalcy (Barnes & Mercer, 2003; Gramsci, 1977; C. Thomas, 1999). Aligning blindness with so-called able-bodied normalcy, contributed to generating categories of other concerning Invalid Pensioners, which was an oppressive outcome in itself.

The significance of the preferential treatment of Blind Pensioners is not to be underestimated. It contains important implications for this thesis. These implications are twofold: first on the ideological level, establishing distinctions between disability categories contributes to reinforcing the ideology of disablism. Second, the examples demonstrate that governments can and do in certain circumstances apply a universal income grant. If this is the case, then following this logic, there is some capacity for the introduction of a universal unconditional grant to all persons, regardless of disability, a point which will be further explored in Chapters Six and Seven.

### **Epoch One Summary**

The conditions leading up to and following the introduction and implementation of the Invalid Pension in the early parts of Epoch One revolved around issues of Commonwealth authority and a conservative paternalistic concern for the well-being of people with a disability in poverty. Commonwealth authority and conservative paternalism discourse perpetuated the ideology of disablism. Commonwealth authority was shown through newly afforded powers of the Commonwealth to regulate the lives of people with a disability via a legitimising statutory framework: the Invalid Pension. The newly afforded powers enacted via the Invalid Pension legislation reflects the formation of a historic bloc whereby the Commonwealth sought to secure hegemony through authority and the regulatory control of Invalid Pensioners (Gramsci, 1977). The notion of permanently incapacitated for work underpinned the eligibility criteria and generated distinctions between people with a disability and the wider population through constructions of invalid citizen and the dualism: un/productive citizen.

During this epoch, the invalid citizen construction was tied to the broader political economy of Australia in that disability categories were produced both discursively and ideologically and shaped by the social and material forces of the time period (Gramsci, 1996). Measures of disability became the central requirement for the Invalid Pension. This requirement led to the exclusion of people with a disability from the labour market on the grounds of their impairment (Gramsci, 1977). Ideological assumptions tied to this led to the category of disability in terms of other. Conservative paternalism was depicted in this epoch as charitable dole, categorical eligibility (Invalid Pension is not an assumed right), moral right (claimants need to be “deserving of a pension”) and conservative mistrust (concern for

idleness and the burden of dependence). People with a disability were expected to be worthy of receiving an Invalid Pension. The ideology of disablism resulted from a combination of authority and paternalism in the emphasis on the construction of pensionable incapacity and conditions attached to the eligibility criteria of the Invalid Pension. The language associated with these ideologies implied the plight of the invalid. The discourses surrounding the enactment of the Blind Pension further entrenched moral and social distinctions, with a lesser status being afforded to people with a disability in receipt of the Invalid Pension.

The next section examines the disability income support policy trajectory in Epoch Two. It traces Commonwealth authority and conservative paternalism, and explores the way in which disablism is entrenched and perpetuated in Epoch Two.



### ***4.3 Epoch Two - 1941-1985: Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)***

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#### **Introduction**

Epoch Two is characterised by the expansion of the world's most comprehensive system of means-tested income support systems from 1940 to 1970 where distinctions between eligibility requirements were applied to the provision of the Commonwealth Invalid and Old-Age Pensions Act 1908. The first part of Epoch Two is underpinned by a policy of economic restructuring and social redevelopment, evident during the Labor Government reign from 1941 to 1950. This period saw only minor changes to the Invalid Pension provisions in 1941 and 1947. In the second part of Epoch Two, the late 1970s represented a marked departure from the expansionist policies to a restricted welfare policy approach through social and economic constraint. The same themes of:

- i. Commonwealth authority: Power of the State to intervene and control of people with a disability; together with,
- ii. conservative paternalism discourse involving charitable and punitive values; which resulted in,
- iii. ideology of disablism and disablist discourse;

featured in this epoch, albeit in different ways from the ways they were expressed in Epoch One. A key distinction is the emergence and constitution of economic fundamentalism ideology in the latter parts of Epoch Two.

#### **i. Commonwealth authority: Power of the State to intervene and control of people with a disability**

In the early parts of Epoch Two up until the mid 1970s, the broader political landscape, including social values and fiscal imperatives, influenced the expansion and contraction of the income support system overall, which had implications for the disability income support system. During Epoch Two, the regulatory control of people with a disability was still apparent, albeit that the manifestation was in substantially different forms. Differing forms of regulatory control were revealed through such features as changing measures of "invalidism" and the nature of the (invalid) citizen and Commonwealth relationship. In Epoch Two, four sub-themes relating to Commonwealth authority incorporated:

- broader political context: Shaping a national welfare scheme. Securing unquestionable authority: Looking out for the poor unfortunate invalids;
- control in changing Invalid Pension eligibility criteria;
- from most needy citizen (1949-1972) to social citizen with conditions attached (1972-1975); and
- compliant invalid citizen: Economic fundamentalism creeps in.

### **Broader political context: Shaping a national welfare scheme**

The early parts of Epoch Two represented a significant period of social change for Australia in response to post-war social and economic conditions. The then Treasurer, Ben Chifley presided over the policy of welfare expansionism, as shown in this extract: “*improved labour standards, economic advancement and social security* [were the core policy position adopted by the then Curtin Government]” (Cited in Kewley, 1980, p. 31). In 1942, the then Prime Minister John Curtin appointed Chifley as Minister in charge of “Post-war Reconstruction”, in effect post-war expansionism for social security measures (Cited in Jordan, 1984, p. 28; cited in Kewley, 1980, p. 31). The impetus for furthering the vision for a national system of welfare provision derived from the way social forces historically and hegemonically shaped a new interpretation of Commonwealth authority. This interplay between socio-economic and political conditions and social forces is evident in the excerpt: “*never again should the Australian working class suffer as ... it had suffered in the Great Depression*” (Cited in Kewley, 1980, p. 31). As such, the social conditions of the time perpetuated the belief that a national social security system was an essential component for ensuring the success of the full employment policy (Gramsci, 1977). This discursive theme denotes the shift toward expansionism and full employment policies, bringing with it a presumed general acceptance of Commonwealth authority.

### ***Securing unquestionable authority: Looking out for the poor unfortunate invalids***

When the Chifley Government came to power in 1945, it was this policy position (expansionism and full employment) that Chifley advanced. Figure 7 depicts the policy commitment, adopted by the Chifley Government in 1946, to social security and instituting a “national welfare programme” (Kewley, 1980, p. 32).



**Figure 7:** Image 'John Curtin: A fair go for all': Australian Labor Party election material: '1946 Repeats Itself: Chifley Spells Security' courtesy of the Chifley Research Centre <http://www.laborhistory.org.au>

While enacting the principles of “a fair go for all” Australians, the Government rhetoric underpinning the policy tended to represent a different manifestation of the Commonwealth authority discourse. Under the directive of the Chifley Government, the Commonwealth Social Security Act (1947) came into effect. The Social Security Act (1947) functioned to hegemonically bring together several different pensions into one national social security system: “[the legislation provides] *a single statute ... relating to age, invalid and widow’s pensions ... and unemployment and sickness benefits*” (Cited in Kewley, 1980, p. 33).<sup>30</sup> A key discursive formation highlights the securing of Commonwealth authority: “[there remained a sense of] *unquestioned authority and leadership* [given to the Government]” (Cited in Kewley, 1980, p. 35). The Commonwealth Government was considered to be the most appropriate body to look after the people, particularly the disadvantaged or “poor unfortunates”. The securing of Commonwealth authority and the “fair go for all” discursive frame represents an example of the way the policy practices and language interacted with the social relations of power and ideology (Gramsci, 1977). In effect the social security legislation operated as an “organ of political hegemony” to secure unquestioned Commonwealth authority and power (Gramsci, 1977).

The social security legislative framework provided the Commonwealth Government with the authority to preside over all matters relating to income support, including the Invalid Pension. There was a sense by the government in power (the then Curtin Government) that a national

<sup>30</sup> The change also led to the Old-Age Pension being redefined as the Age Pension (Commonwealth Department of Family & Community Services, 2001).

approach to welfare was required to ensure the essence of civic society and humanity. The following phrase when used with imagery reveals the discursive practice used in securing unquestionable authority hegemony and looking out for the poor unfortunate invalids discourse: “*new* [emphasis in original] *Australia ... whose people are free from the torturing uncertainty of fear and hardship*” (Figure 7). As these illustrations show, in the aftermath of war, the then new Chifley Government sought to attain hegemonic authority through consent in order to modernise welfare through social change. This securing of Commonwealth authority functioned to dispel the public’s perception of any connection between welfare benefits/payments and charity (Gramsci, 1977). The ideal was framed in terms of generating distinctions between eligibility criteria, “charitable dole” and welfare provision, with the Commonwealth functioning to administer control of the change process.

These above extracts also demonstrate the emergence and constitution of a new discourse associated with social security and disability income support. However, this occurred within the existing structures of the Commonwealth as a means of ensuring unquestionable authority. This change in policy language and securing a national income support system through an assumed unquestionable acceptance of authority represents one way that Commonwealth authority manifested differently in Epoch Two. Where in Epoch One the newly afforded powers established Commonwealth authority, in Epoch Two this new authority gave way to an established certainty that the Commonwealth would look after people with a disability. The historic bloc was transformed in Epoch Two through the fair go discourse and mobilising support for a national income support scheme (Gramsci, 1977). Here, the securing of hegemony by the Commonwealth authority was contingent in gaining control in changing the Invalid Pension eligibility criteria.

### **Control in changing Invalid Pension eligibility criteria**

The Commonwealth authority, control in changing Invalid Pension eligibility criteria discursive theme is evident in comments concerning eligibility criteria and permanent incapacity. Although the Invalid Pension remained relatively unchanged during Epoch Two and until the 1970s, the tendency in granting the pension was to err on the side of generosity and take account of labour market conditions. Thus, the eligibility criteria of the Invalid Pension centred on the central requirement of a person being permanently incapacitated for work: “*incapacity for work is established when a person’s ability to engage in paid employment is sufficiently reduced by a medical condition in association with non-medical factors* [for example, individual characteristics, prior work history and availability of work]” (Cited in Cass et al., 1988, p. 71). These eligibility criteria and associated characteristics relate to the deficit model of disability that perpetuated authoritarian and scientific discourses surrounding what constitutes normal (able-bodied) and what constitutes abnormal (disabled-bodied) (Barnes & Mercer, 2003; Gramsci, 1977, 1996).

In seeking uniformity of decision-making, between 1940 and 1941, minor changes to the eligibility criteria led to the implementation of the 15 percentile ruling: “[a person is considered permanently incapacitated if the] *disability precludes the earning of more than 15 per cent of a living wage*” (Joint Committee on Social Security, 1941, Commonwealth of Australia, Parliamentary Debates, 20 November, 1941, p. 643, cited in Jordan, 1984, p. 94). The conundrum for decision-makers centred on the original intent of the Invalid and Old-Age Pensions, and the Pensions Commissioner’s interpretation, as demonstrated in this extract: “‘*permanent incapacity for work*’ ... [is treated as] ‘*total and permanent incapacity for work*’ and the Act is administered accordingly” (Joint Committee on Social Security, 1941, Commonwealth of Australia, Parliamentary Debates, 20 November, 1941, p. 643, cited in Jordan, 1984, p. 94). While the 15 per cent ruling was not expected to be associated with earning capacity, administering the requirement proved to be problematic, given the difficulties associated with measuring impairment and incorporating the assessment of different socio-economic conditions that impacted upon people with a disability.

The following extract illustrates the discursive change around the eligibility criteria in the Invalid Pension legislation. The clause specified that “‘*a person shall be deemed to be permanently incapacitated if he is permanently incapable of work or if his capacity for work does not exceed 15 per centum*’” (Commonwealth Invalid & Old-Age Pension, 1908, cited in Jordan, 1984, p. 94; cited in Kewley, 1980, p. 82). Another condition enacted alongside the 15 per cent ruling centred on an incentive criterion: “[the Invalid Pension is expected to] *encourage invalids to become self-supporting* [through rehabilitation]” (Commonwealth Invalid & Old-Age Pension, 1908, cited in Kewley, 1980, p. 82). Using scientific standards based on deficit in eligibility determinations, rather than assessment of income, forms part of the “ideology of normalcy” (Oliver, 2009, p. 37). The ideology of normalcy is closely connected to social control (Oliver, 2009). In the case of this present study, it leads to the reinforcement of Commonwealth authority through its re-defining of what disability actually comprises.

A further change in 1947 did little to shift away from the quantification of disability. The provision perpetuated Commonwealth authority and the ideology of normalcy, as demonstrated in this extract: “‘*a person shall be deemed permanently incapacitated for work if the degree of his permanent incapacity for work is not less than eighty-five per centum*’” (Commonwealth Invalid & Old-Age Pension, 1908, cited in Kewley, 1980, p. 82). The 85 per cent incapacity measurement continued throughout Epoch Two. However, another extract highlights the problems with quantifying the ruling: “[medical and administrative assessors found it difficult to determine] *precisely what constitutes permanent incapacity to the extent of 85 per cent* [given the wide variations in impairment types]” (Cited in Kewley, 1980, p. 82). A later extract illustrated this discursive theme of securing control through changing Invalid Pension eligibility criteria which showed the complexity involving measuring impairment:

*“assessment of 85 per cent permanent incapacity for work has necessarily involved processes of difficult ... arbitrary, decision-making”* (Cited in Cass et al., 1988, p. 72). The next extract revealed the coercive nature of the discursive formation: *“[measuring 85 per cent incapacity tended to be a] matter [left] to the subjective judgment of the medical examiner”* (Cited in Cass et al., 1988, p. 99). Here, the Commonwealth authority reinforced regulatory controls through changes to the Invalid Pension eligibility criteria (Gramsci, 1977). This entrenchment led to difficulties given the propensity for moral judgements.

Several examples illustrated moral judgements and the discursive theme underpinning the rationale for revoking the pension. The following extract of one case was chosen as it demonstrated the moral judgement attached to pension eligibility determinations: *“the medical evidence was clear enough, but cancellation was considered on the ground that he was not 'deserving of a pension' ... [and that the person] 'displayed a total lack of public responsibility'”* (Cited in Jordan, 1984, p. 68). In this account, if no satisfactory measurement could be determined, then decision-making relied on the vague deserving and non-deserving requirement of the Invalid Pensions Act. Barnes and Mercer (2003) referred to the problems associated with scientific measures that quantified disability, given the propensity for entrenching distinctions between those persons considered able to work, and people quantified as unable to work. The outcome was that the disability concept came to be equated with defectiveness and degeneracy, evident in the moral assumptions attached to eligibility criteria. Thus, the data revealed the social relations of power and ideology underpinning the policy practices and language of the Australian disability income support system.

### **From most needy citizen (1949-1972) to social citizen with conditions attached (1972-1975)**

Between 1949 and 1972, Commonwealth authority manifested differently from the way it did in Epoch One. The Menzies, Gorton and McMahon Governments between 1949 and 1972, embraced targeted income support policy approaches to direct pension payments to the “most needy”. The data indicated that the regulatory control of people with a disability was extended by restricting the Invalid Pension to those persons who were considered most deserving. The Menzies Government held power from 1949 to 1966 and was instrumental in shaping the Commonwealth authority discourse through a targeted policy approach (Cited in Kewley, 1980, p. 35). The then Member for Bradfield, H. B. Turner questioned the selectivity policies adopted by the Menzies Government, as seen in this extract:

*Within the last few years the government has introduced a system under which, instead of increasing age pensions all round, it has recognised that certain people, such as single pensioners, suffer great disabilities. It was felt better that their disabilities should be relieved rather than that there should be an all round increase.... This involved the great issue as to whether social services should be all-embracing or should deal with the needy. This matter was debated in Parliament without any regard for the principle involved in it. We have never had*

*any principle in our social services legislation.* (Commonwealth of Australia, Parliamentary Debates, 1 September, 1965, November, 1935, p. 694, cited in Kewley, 1980, p. 63)

Here, the illustration highlights the dialectical relations of Commonwealth authority, policy language and policy practices in restricting Invalid Pension eligibility. The hegemonic project centred on securing consent in the political realm for the selective policies through the use of means-testing and the discursive frame of most needy citizen (Gramsci, 1977). Adopting a similar stance to the Menzies Government, the Liberal Gorton Government (1968) targeted increases to those people with the “greatest need” (Cited in Kewley, 1980, p. 63) as opposed to overall pension increases. The narrowing of Invalid Pension eligibility to the most needy citizen can also be seen in arguments by the McMahon Government (1971) who used the phrase “most in need”. The ideology of targeting and the most needy citizen discourse spanning Epoch Two shows the pervasive normative nature of language surrounding income support policy debates. The means-test became the primary mechanism for introducing selective policies, which functioned to restrict the Invalid Pension to deserving recipients. This interplay between hegemonic practices and discourse served to legitimise the drawing in of Government funding. Targeting perpetuated the assumption that the government could no longer meet all the needs of the people (Gramsci, 1977).

The period from the 1970s (under both the Labour Whitlam Government, from 1972 to 1975, and the Liberal Fraser Government, from 1975 to 1980) represented the most significant shift for the Invalid Pension in terms of its impact and consequence. Here, the shift represented a significant recontextualisation of language as demonstrated in the shift from the most needy citizen (1949-1972) to social citizen with conditions attached (1972-1975) discourse.

Although the Whitlam Government (1972 to 1975) attempted to transform policy principles from liberal assumptions of most needy to social democratic principles of citizens' rights, the enduring conservative principles underpinning the Invalid Pension remained in place. These became narrowly prescribed rights as people with a disability were expected to share “community rights” and participate in society. The Whitlam Government sought a policy platform that enhanced the social rights of all people (Kewley, 1980). The following extract is an example of the newly framed discourses taken up by the then Whitlam Government situated within the existing Australian income support policy structures. The narrowly prescribed rights for people with a disability were contained within the context of the existing traditional disability income support policy and welfare programs. In a parliamentary speech, the then Minister for Social Security, Hayden (1973) claimed: “[the policy focus on] *adequate welfare systems as ... a public right ... contributes to the well-being of the total Australian community. This new philosophy demands a change of emphasis in government policy and welfare programs*” (Commonwealth of Australia, Parliamentary Debates, 19 September,

1973, p. 1237, cited in Kewley, 1980, p. 42). The last sentence provides insight into the enduring nature of Commonwealth authority and liberal-conservative discourses together with the change required to introduce policy principles based on community rights. In itself, this reflects the social relations of power and ideology.

The data indicated that the period was also characterised by increases in the Invalid Pension payment rates. Most remarkably, Whitlam (1972) proclaimed:

*The basic pension rate will no longer be tied to the financial and political considerations of Budgets. All pensions will be immediately raised ... until it reaches 25 per cent of average weekly male earnings. It will never be allowed to fall below that level.* (Commonwealth of Australia, Policy Speech, 1972, p. 17, cited in Kewley, 1980, p. 55)

In this account, the legislative changes centred on the Whitlam Government standardising the pension and benefit rates. Yet the emphasis on social citizenship and standardising pension rates did not translate into social change for people with a disability in receipt of the Invalid Pension. That is, the underpinning ideological assumptions remained (for example, most needy). As such, the original principles surrounding the requirements for the Invalid Pension remained in place. In these extracts, the discourse of community rights and the minor changes to social practices (standardisation of basic pension/benefit rates) failed to transform Commonwealth authority and regulatory practices. Thus, the Invalid Pension continued to operate from traditional assumptions of deficit and regulatory control, which run counter to social citizenship (Oliver, 2009). Further, the provision of disability income support was conditional upon the perceived appropriate and regulated behaviour of people with a disability.

### **Compliant invalid citizen: Economic fundamentalism creeps in (post 1975)**

An important ideological shift occurred at the time of the Whitlam Government's final budget (1975 to 1976). The then Treasurer Hayden, in presenting the final budget, extolled the virtues of the Whitlam Government. Hayden commented on significant changes made to social security and welfare provisions, yet simultaneously argued for evaluating the implications of the changes (Commonwealth of Australia, Parliamentary Debates, 19 August, 1975, p. 56, cited in Kewley, 1980, pp. 56-57). In a parliamentary speech, Wheeldon (the then Minister for Social Security, 1975) mirrored these sentiments by stating that:

[What is required is the] *'consolidation of advances' pending a full review of the income security system.... In the existing climate of high inflation and unemployment ... for the immediate future restraint should be shown by all in their demands for more resources, whether in the form of public services or higher incomes.* (Commonwealth of Australia, Parliamentary Debates, 22 October, 1975, p. 1403, cited in Kewley, 1980, p. 57)

As this extract shows, for the first time, leaders were drawing on the principles of economic fundamentalism in conjunction with Commonwealth authority to construct the justification for



perceived necessary budget constraints and welfare changes. The discursive theme points to the emergence and constitution of economic ideals and draws attention to the social relations of power and ideology.

In a concerted push to tackle inflation and a marked departure from previous aims of the Whitlam Government, Hayden (1975) demanded that the Government employ constraint, as demonstrated in this phrase: “*utmost restraint’ on government spending*” (Commonwealth of Australia, Parliamentary Debates, 19 August, 1975, p. 53, cited in Kewley, 1980, p. 72). Hayden considered inflation to be problematic as seen in this extract: “[inflation is] *Australia’s ‘most menacing enemy’ on the economic front*” (Commonwealth of Australia, Parliamentary Debates, 19 August, 1975, p. 53, cited in Kewley, 1980, p. 72). From this stance, social policy aims were overridden by the quest for sound economic policy. Citing the need for economic constraint, Hayden put forward the 1975-6 budget based on the ideals of economic fundamentalism (Kewley, 1980). In the following extract, Hayden uses a rhetorical device to evoke fear concerning economic forces and inflation:

*We are no longer operating in that simple Keynesian world in which some reduction in unemployment could, apparently always be purchased at cost of some more inflation. Today, it is inflation itself which is the central policy problem. More inflation simply leads to more unemployment.* (Commonwealth of Australia, Parliamentary Debates, 19 August, 1975, p. 53, cited in Kewley, 1980, p. 72)

In these illustrations, the threat of inflation and high unemployment provided legitimacy for curtailing welfare expenditure. Here, the discourse of economic restraint and ideology of economic fundamentalism, with its emphasis on efficiencies, is touted as a logical, rational and viable alternative to the perceived outdated Keynesian economics. The discourse of fear thereby justified the policy pursuit of decreased public sector spending (Gramsci, 1977). The pre-eminence of economic policy over social policy was at distinct conceptual odds with the original aim of the Whitlam Government stance. The power of the discursive formation lies in the pursuit of a logical policy strategy presented as rational and quantifiable. The power of the argument is reinforced through the order of discourses, which established the claims as irrefutable and unchallengeable (Gramsci, 1977).

The hegemony was further perpetuated through the strategic use of a rhetorical device (identifiable in the Hayden, 1975 speech) to invoke fear among the general population. For example, the discourse of “*Australia’s most menacing enemy on the economic front*” invokes strong images of a looming disaster (such as high levels of unemployment and widespread poverty) unless stringent economic policy constraints are introduced. In doing so, Hayden (1975) employs other conventional discourses, which include the scarce resources discourse and “targeting the most needy” discourse. The discourses of economic fundamentalism embedded the notion that the claims were grounded in logical fact, thereby legitimising the use of tighter economic policies. The discourse of fear and scarcity invoke uncertainty among the general population concerning the economic stability of Australia (Gramsci,

1977). Thus, in providing a viable alternative the Commonwealth not only re-asserts its power and authority by taking control of the situation, but it also presents a national strategy that alleviates any issues of uncertainty. Here, the discourse also suggests the emergence and constitution of the compliant invalid citizen.

In effect, these rhetorical devices used in parliamentary speeches legitimised Commonwealth authority in the scaling back of expansionist policies and paved the way for the incoming Fraser Government to instigate more stringent economic policies. This stringency subsequently led to the further targeting of the Invalid Pension (Kewley, 1980). In an era heavily grounded in liberal ideology, the Fraser Government sought to move away from “traditional policy” and expansionism to the tightening of requirements for the Invalid Pension. Representing a different manifestation of the historic bloc, this particular mode of regulation functioned to secure Commonwealth authority through engendering compliance of the invalid citizen, while simultaneously securing neo-liberal principles. This paved the way for a newly formed neo-liberal (economic fundamentalist) power bloc (Gramsci, 1977).

## **ii. Conservative paternalism discourse involving charitable and punitive values**

In this epoch, conservative paternalism discourse was reflected in the following sub-themes:

- conservative paternalism, helpless dependents and “permanently unemployable”;
- real need and incentives: Invalid Pension as stifling the motivation of invalids to work;
- conservative mistrust: Inadequate invalids and the reputable Invalid Pension; and
- genuinely needy, the undeserving invalids and genuinely looking for work.

### **Conservative paternalism, helpless dependents and “permanently unemployable”**

Conservative paternalism discourse is evident in the Gorton Liberal Government (1968) policy debates in which the Gorton speech affirmed:

*Our aim is a social welfare structure which identifies the most needy and sees that those who have no other means are provided with enough to live on in a modest, self respecting way without requiring any other assistance from outside the pension.... What we want to see is that the aged needy, the ill needy, those really suffering from some unfortunate circumstance through no fault of their own, are adequately provided for by the nation, but that this should be done without destroying the incentive to save and without destroying the incentive to self-reliance. (Commonwealth of Australia, Parliamentary Debates, 27 August, 1968, p. 694, cited in Kewley, 1980, p. 63)*

The construction of Invalid Pensioners as “ill needy” re-classified people with a disability into a distinct group, essentially those deemed to be “suffering unfortunates”. Including the discursive frame “unfortunate circumstances through no fault of their own” emphasised the

moral responsibility of people with a disability, while simultaneously blaming these same individuals for their own “unfortunate” circumstances (Commonwealth of Australia, Parliamentary Debates, 27 August, 1968, p. 694, cited in Kewley, 1980, p. 63). Here Gorton used a rhetorical device to appeal to public sympathy and reinforce punitive values and greater self-reliance. In this discourse, the language of helplessness, suffering unfortunates and needy invoke images of people with a disability requiring disability income support as people needing to be pitied. This image is juxtaposed against the incentive argument and rhetoric of self-reliance whereby presumed malingering is to be prevented. Disability social theorists (such as Barnes & Mercer, 2003; Clear & Gleeson, 2002; Oliver, 2009) contended that the poor unfortunates rhetoric generated notions of helplessness and dependency which portrayed people with a disability negatively.

The data revealed that conservative paternalism, helpless dependents and “permanently unemployable” discourse was also reflected in public and administrative language. For example, the following case excerpts were chosen as each case illustrates the conservative paternalism discourse promoting the helpless dependents ideology inherent in pension eligibility determinations. In 1960, a review found: *“apart from preoccupation with his imaginary symptoms there is nothing to suggest mental disorder at present.... A good day's hard work would be excellent treatment for this patient”* (Commonwealth Medical Reviewer, 1960, cited in Jordan, 1984, p. 136). This discursive formation of helpless dependents operates through conservative paternalism discourse to shape policy language in order to influence public perceptions and secure dominant interests (Gramsci, 1977).

Similar discursive formations were found in another Invalid Pension case review:

*'Mild hysterical reaction in a person of low average intelligence... Any incapacity is due to her defective personality and the way she has been nurtured to escape reality [and] is not of the grade to prevent her doing simple routine work' ... [The CMR, 1947 asserted she] 'might well be sent to an institution and be made to work'.... 'Apathy, and depreciating mentality [was diagnosed circa 1948-1949]'. Another doctor examined her in 1950 and found nothing wrong. Rehabilitation training was offered and refused. Her 'only motive in life appears to be to become a pensioner... It was pointed out that she was a poor candidate for rehabilitation anyway, and grant was recommended on the ground that she 'is permanently unemployable and... her defective mentality is irremediable.'* (Cited in Jordan, 1984, p. 86)

In these extracts, when individuals failed to comply with Commonwealth authority, they were paternalistically constructed as permanently unemployable on the basis of deficits such as “defective mentality” (Line ten, Jordan, 1984). Claims that an individual's “motive in life [is to] become a pensioner” (Line seven, Jordan, 1984) leads to devaluing people with a disability in receipt of the Invalid Pension. Individual motivations become the source of moral judgements and the hegemony of conservative paternalism, helpless dependents and

permanently unemployable manifests through the assumed need to intervene by introducing incentives.

### **Real need and incentives: Invalid Pension as stifling the motivation of invalids to work**

Commonwealth paternalism prevailed in the never ending push for incentives attached to the Invalid Pension. In an attempt to secure hegemonic dominance, the real need and incentive discourse perpetuated the assumption that the Invalid Pension was stifling the motivation of invalids to work. The question of earning capacity and Invalid Pension represented something of a conundrum for the Government. Yet it was believed that incentives were required, as evident in this excerpt: “*restrictions on employment [were] stifling the incentive of invalids to engage in employment*” (Case Review, circa 1965, cited in Jordan, 1984, p. 101). Therefore, the policy approach was somewhat quasi-experimental, as demonstrated in this extract: “[the Commonwealth deemed it] *necessary to allow almost unrestricted earnings for an initial period, to enable the pensioner to see if he will be able to compete in the normal labor market*” (Case Review, circa 1965, cited in Jordan, 1984, p. 101). Thus, factoring in earning capacity rewarded individuals considered to be exceptional. The real needs discourse is evident in the discursive phrase: “[“Invalid Pensioner” possessing] *exceptional gifts*” (Cited in Jordan, 1984, p. 93). Exceptionally gifted individuals were those who were considered to make extraordinary efforts to work in light of an objectively measured disability and were “treated” with greater favour than those individuals who were perceived to be malingering. The image portrayed, is based on personal tragedy stereotypes.

Another statement reveals the personal tragedy stereotype: “[the individual displayed a] *‘triumph of the spirit over a severe physical handicap’* [to maintain payment of the Invalid Pension]” (Case Review, circa 1965, cited in Jordan, 1984, p. 93). A mobilising discourse pointed to the securing of Commonwealth authority through conservative paternalism: “[the Government found that] *as competition for jobs increased the threshold of employability would rise and numbers of people would become ... ‘incapacitated for work’*” (Cited in Jordan, 1984, p. 125). Here, the account depicts the emergence and constitution of securing the “permanently unemployable”, real need and incentives discourse as somehow natural and commonsense. The difficulty with these hegemonic assumptions is the inherent contradiction hidden below-the-surface of the discursive frame (Gramsci, 1977). That is, the frame fails to take into account the changing nature of the labour market. During different time periods (late 1950s to the 1960s), changes to the labour market meant greater difficulties for people with a disability, as seen in this extract: “*the Australian labor market became gradually less hospitable to people with disabilities, especially males*” (Cited in Jordan, 1984, p. 125).

The “real need” discourse and connection to incentives and changing nature of labour markets is further highlighted in the excerpt from the State Directors Conference (circa 1958)

whereby the discussion centred on the problem of measuring disability in line with the 85 per cent requirement: “*the difficult financial position of persons who are permanently incapacitated to an extent closely approaching 85 per cent and the tendency of some C M Rs to then take the current employment situation into account*” (Cited in Jordan, 1984, p. 127). During the conference, the Directors reflected on an earlier communication by the then Chief Quarantine Officer (circa 1937) concerning the same difficulty:

*'In assessing [incapacity] I have found it impossible to ignore completely the economic conditions of the community. If a strict adherence to the letter of the law is insisted on it means that one can imagine in any but a moribund case some means of earning money. We have followed more definitely the attitude of - is a man employable? ... This involves some knowledge of other than his physical condition.'* (Cited in Jordan, 1984, p. 127)

Unlike the plight of the invalid notion prevalent in Epoch One, the reported concern in Epoch Two suggested that the granting of the Invalid Pension influences an individual's incentive to look for work. An extract provides an example of this distinction. In this extract, the then State Director Powell (circa 1969-1971) makes reference to motivational behaviours and qualities of individuals in receipt of the Invalid Pension and the presumed consequent impact on taxpayers. The then State Director Powell reported:

*'the grant of an invalid pension tends to decrease the motivation of disabled people to fit themselves for a type of employment within their... capacities ... I am conscious that the recommendation of an invalid pension ... will have a profound effect on... attitude to employment and ... life itself, and will certainly involve a large amount of the taxpayers' money.'* (State Director Powell, Review Project 1969-1971, cited in Jordan, 1984, p. 146)

Here, the discursive theme of real need and incentives is reproduced in Invalid Pension policy. This is seen in the discursive formation referring to the Invalid Pension as a disincentive to work and a burden on taxpayers. Strong associations were made between the lack of incentives and the impact on individuals receiving the Invalid Pension and the wider public. Yet the logic of incentives did not account for the fact that people with a disability may be compelled into work even at the expense of their health. This consequence is indicated in the following discursive formation: “*the necessity for the appearance of being self-supporting or financial pressures may induce an invalid to work despite the knowledge that such activity will worsen his condition*” (Cited in Jordan, 1984, p. 128). In this account, a contradiction occurs whereby compelling people with a disability into employment is exacerbated by the potential for earnings despite a permanent incapacity. Here, the so-called need for incentives does not match the reality of Invalid Pensioners (Gramsci, 1977).

By 1975, policy imperatives were driven by higher rates of unemployment. The focus for the Fraser Government was on controlling inflation, while maintaining incentives for work (Commonwealth of Australia, Parliamentary Debates, 17 February, 1976, p. 12, cited in Kewley, 1980, pp. 72-73). The following extract highlights the rhetorical technique used by

the then Governor-General in 1976 to cement the argument for tightening welfare assistance:

*The Government will place great emphasis on directing welfare assistance to those in real need. Unless there is a concentration on those in real need, schemes of assistance do not provide maximum possible assistance to the disadvantaged and become excessively costly.* (Commonwealth of Australia, Parliamentary Debates, 17 February, 1976, p. 12, cited in Kewley, 1980, p. 73)

Here the real need and incentives, Invalid Pension as stifling the motivation of invalids to work discursive theme is prominent. The focus of the above policy statement reinforced the discourse of provision of income support to only those individuals who are perceived as motivated to work, rather than an emphasis on full-employment. The assumption generated was that jobs will be available to those persons who demonstrate a desire to work. The inference underpinning these notions was that other recipients, including people who rely on the Invalid Pension, are somehow bludging on the income support system, and thus less wanting. The consequence of high costs and potential harm to the community was used to justify targeting the Invalid Pension. Economic fundamentalism provided the ideological platform for legitimising harsh targeting. Here the old form of Commonwealth authority and conservative paternalism function is replaced with a new Commonwealth authority and conservative paternalism in which economic principles attain prominence (Gramsci, 1977). This reframing of policy debates reveals the emergence and constitution of the new Commonwealth authority and conservative paternalism discourse.

The Fraser Government's use of the "real need" discourse centred on the presumed concern for the increased number of people in receipt of the Invalid Pension. The following extract provides an example of the use of hard evidence to garner alliances with the general populace to secure hegemonic dominance: "*at the end of 1977-8 the number of invalid pensioners was 204,944. That represented an increase of ... 1,981 over the number for the previous year [as] 17,000 invalid pensioners [moved across to the Age Pension]*" (Commonwealth Department of Social Security Annual Report, 1977-8, pp. 7, 49, 52, cited in Kewley, 1980, p. 85). The increase in Invalid Pension numbers from June 1967 to June 1978 constituted a mere increase of 0.8 per cent (shown in the shift from 1.6 per cent to 2.4 per cent) (Commonwealth Department of Social Security Annual Report, 1977-8, pp. 7, 49, 52, cited in Kewley, 1980, pp. 85-86). The Government perceived this increase to be substantial and resulting from the previous Whitlam Government scaling back the means and income test. The Fraser Government argued that the total expenditure for the Invalid Pension during 1977 and 1978 was \$598 million. The real need discourse and social conditions together with the use of fear rhetorical device helped the Government to secure hegemonic dominance. This dominant worldview was necessary for justifying the containment of costs and scaling back on the Invalid Pension provision (Gramsci, 1977).

In effect, the actual expenditure for the Invalid Pension (\$598 million) was substantially lower than that of the Age Pension (\$2,934 million) (Commonwealth Department of Social Security Annual Report, 1977-8, p. 54, cited in Kewley, 1980, p. 86). The discourse used by the Fraser Government functioned to unquestionably portray an image of vast amounts of money being expended for the Invalid Pension. Yet, the data presented a different picture. For example, one discourse suggested that the expenditure for the Invalid Pension was significantly low in comparison with the overall welfare costs, as demonstrated in this extract: “[this amount reflected] *almost half of the total expenditure of \$6,200 million under the Social Services Act*” (Commonwealth Department of Social Security Annual Report, 1977-8, p. 54, cited in Kewley, 1980, p. 86). Clearly, this disparity demonstrates the paternalistic stance underpinning the Fraser Government policy approach to Invalid Pensions. The overarching policy concern for the Fraser Government was reducing Commonwealth expenditure on income support, including disability income support, as a counter attack on the previous Whitlam Government’s assumed generous policies. The theme of real need and incentives, Invalid Pension as stifling the motivation of invalids to work was significant during the time period of the Fraser Government.

### **Conservative mistrust: Inadequate invalids and the reputable Invalid Pension**

The problem perceived by the Fraser Government was the tendency for the Invalid Pension provision to be based on the grounds of sympathetic humanitarianism. This emergence of the conservative mistrust construction involved countering presumed sympathetic humanitarianism. The theme of conservative mistrust is found in an earlier extract from an EMR Meeting of Medical Consultants (circa 1971) whereby the then Medical Consultant, King, reported on “inadequate invalids” and the reputable nature of the Invalid Pension: “[there is an] *existing tendency to grant an invalid pension on sympathetic humanitarian rather than strict medical criteria [and sound administrative processes]*” (Medical Consultant King, cited in Jordan, 1984, p. 139). Given the earlier emphasis on perceived sympathetic humanitarian grounds in eligibility determinations and the concern for increased numbers of Invalid Pension recipients, the discourse of conservative mistrust framed the Fraser Government policy stance.

Another example of this form of conservative mistrust in prior eligibility considerations is shown in the following excerpt: “[decision-makers sought to] *keep invalid pension as it is except for clarification of conditions of eligibility*” (Cited in Jordan, 1984, p. 147). Public perception echoed the Fraser Government’s conservative mistrust discourse. For example, a medical commentator (Ellard, 1975) suggested that tighter restrictions should be applied to Invalid Pension eligibility: “*sometimes giving a person what he wants, or what others want on his behalf, will corrupt him, even though it makes us feel worthy*” (Cited in Jordan, 1984, p. 140). People with a disability were portrayed as dishonest. The use of the word “corrupt” suggested that people with a disability were disinclined to work and if offered unfettered

access to the Invalid Pension, then they would somehow be susceptible to roting the income support system. In a similar vein, another commentator (M. Glick) argued “*we should try to prevent such people from hiding their inadequacies behind the respectability of the invalid pension*” (*Medical Journal of Australia*, 17 January, 1976, p. 73, cited in Jordan, 1984, p. 140). The emphasis in this illustration is on the deficiencies of people with a disability. Concepts such as inadequate and hiding assumed that people with a disability were somehow unworthy and defective. Disability social theorists (Barnes & Mercer, 2003; C. Thomas, 1999) have long argued against the promotion of the deficiency model and images of people with a disability reliant on disability income support as defective. Similarly, the use of the word respectability draws on conservative connotations that the Invalid Pension was decent and reputable for those who deserve to receive such an entitlement. The inadequate invalid discourse was found in phrases such as “*bludging on the system* [if they were not found to be] *genuinely looking for work*” (Cited in Baume, 1977, p. 5). This change occurred in an era in which individuals were subject to conservative mistrust. In part this conservative mistrust perpetuated a hegemonic transformation to the disability income support system.

### **Genuinely needy, the undeserving invalids and genuinely looking for work**

The Fraser Government policies increased regulations and applied “work tests” to people in receipt of unemployment benefits. This change led to tighter restrictions on unemployment benefits, including a return to protecting only the “genuinely needy”. The framing of parliamentary debates reveals the emergence and constitution of the “genuinely needy” discourse and policy construction. Figure 8 depicted the ideology underpinning the Fraser Government policy. The policy prescription focused on the high numbers of unemployed and large numbers of Invalid Pension grant recipients by claiming that only people “genuinely looking for jobs” should be provided benefits and pensions. Thus, using this logic, and given the criteria permanently incapacitated for work, only the genuinely needy people with a disability would receive the Invalid Pension. Figure 8 also captured the incentive argument and the contradiction in an era of economic and political instability.<sup>31</sup> The Fraser Government cited the increased numbers of people with a disability accessing the Invalid Pension as the rationale for tightening eligibility.

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<sup>31</sup> Pictured next page is the then Prime Minister, Malcolm Fraser and Ian Viner, MP, Minister assisting the Prime Minister (to 8 December 1979). Minister assisting the Treasurer (25 August 1978 to 8 December 1979). Published in the *Canberra Times*, 6 July 1979.





**Figure 8:** Part of the Pryor collection of cartoons and drawings. Cartoon created by Pryor, Geoff. Reproduced courtesy of National Library of Australia: <http://www.nla.gov.au/pict/pic>

In the above cartoon, there appears to be a lack of distinction as to who the Government's policy is targeting (for example, unemployed people or people with a disability). The actual aim of the Government policy centred on restricting public expenditure and targeting the needy, which is clearly articulated in the phrase: "*those in real need*" (Cited in Baume, 1977, pp. 6 & 7). The dole is synonymous with welfare payments, inclusive of the Invalid Pension in the sense that the implications were that the income support system as a whole is open to rorting (Myers, 1977). People with a disability were treated as a distinctly separate concern from those persons who were deemed unemployed, given the Invalid Pension criterion of permanently incapacitated and assessments of "unemployable" (Gramsci, 1977, Myers, 1977). This generated distinctions between able-bodied and disabled persons. The cartoon captures the rhetorical device contained in the Fraser Government policy whereby the policy target is those people considered "genuinely looking for work". This technique is used to promote distance between those who contribute and those who don't contribute to the workforce. Again, the discursive formation represents people in receipt of income support as devalued.

The data indicated that difficulties ensued in eligibility determinations where people with a disability did not meet the 85 per cent requirement. For example, an extract showed: "*incapacity which fell short of the 85 per cent incapacity specified as the criterion for entitlement to an invalid pension but ... rendered the person virtually unemployable*" (Cited in

Myers, 1977, pp. 19-20). The orders of discourse in the next extract make visible the consequences: *“such persons remain on CES [Commonwealth Employment Service] registers and are entitled to receive unemployment benefit”* (Cited in Myers, 1977, p. 20). Another extract captured the ideological assumptions and “genuinely needy” discursive theme underpinning the Fraser Government policy stance: *“if you are unemployed through unavoidable circumstances, then society will, with a reasonable grace, sustain you: if you are one of the undeserving poor and the new ‘Fraserfare’ society is turning against you”* (Cited in Baume, 1977, p. 5). The Baume text used a counter discourse to highlight the punitive nature of the policy change:

*The Fraser welfare revolution is not simply a blind ‘handouts to the poor’ exercise.... [it is] hand in hand with the attacks on dole-bludgers and benefit-cheats, (the apex of the undeserving poor) the government is providing an increasing welfare emphasis on the deserving poor.* (p. 5)

Here, the extract demonstrates an alternative discourse to the conventional wisdom of the Fraser Government, whereby the discourses of the Government are seen to be attacking vulnerable members of society. The illustration draws attention to the hegemonic project of the Fraser Government. The text functions to point out the unintended consequences of targeting solely the deserving poor and brings attention the punitive nature of the policy (Gramsci, 1977). What is also clear, however, is that the language of genuinely unemployed and genuinely looking for work diverted attention away from the impact of socio-economic conditions and government responsibility in an effort for governments to blame individuals for their situation. This diversion tactic forms part of the dialectal relations of policy texts and practices (Barnes & Mercer, 2003).

The Fraser Government believed that without such as strategy, as in the work tests measures, malingering will ensue, as seen in this discursive frame: *“unemployed people will develop apathy towards work through enforced idleness and dependence on government support”* (Cited in Myers, 1977, p. 4). This perception was supported by discursive formations surrounding the language of the undeserving invalids and genuinely looking for work: *“there must be some return to the community from the money handed out by the government”* (Cited in Myers, 1977, p. 4). The next excerpt makes similar conclusions about the Fraser Government policy, that is, that the attacks on welfare by the Fraser Government were defended by a shift in ideology: *“taxpayers [were] heartily sick of reformist fingers continually dipping into their wallets”* (Cited in Baume, 1977, p. 5). The illustration captured a prevailing perception attacking the so-called excesses of the Whitlam Government.

The discourse of genuinely needy, the undeserving invalids and genuinely looking for work espoused by the Fraser Government generated the assumption that large numbers of disability pensioners were idle, as seen in this phrase: *“having holidays at the expense of the taxpayer”* (Cited in Myers, 1977, p. 4). The notion of the untapped potential of the

“unemployed labour force” was fuelled by the undeserving invalids discourse. These extracts provide insight into the way the discourse of the Fraser Government functioned to influence public perceptions of people with a disability in receipt of income support and unemployed persons. These discursive formations provided a discursive space for the new hegemony of economic fundamentalism (Gramsci, 1977). By forming alliances with the general community and taxpayers, the Fraser Government gave rhetorical power to the notions of genuinely needy, undeserving invalids and genuinely looking for work. In turn, this use of conservative paternalism discourse, together with Commonwealth authority provided the justification for institutionalising the tighter measures.

The Fraser Government operated in stark contrast to some of the previous governments (particularly the Chifley and Whitlam Governments) approach. For the Chifley and Whitlam Governments, the policy intent centred on the provision of income support to all persons in need via general taxation revenue. The Chifley and Whitlam Governments based their policy stances on redistribution of wealth philosophy: *“the desire to spread the financial load in accordance with ability to pay rather than let it fall on specific sectors of the community”* (Cited in Myers, 1977, p. 6). In this account, the claim is supported by notions of collective benefit and responsibility. However, there was a newly formed neo-liberal power bloc (Gramsci, 1977). The Fraser Government opposed the collective benefit position and contended that only the deserving poor and genuinely needy be assisted given the perceived support garnered from the general population (Myers, 1977). Yet, greater community influence in some sectors called for the Fraser Government to provide for the most deserving. This discursive theme was found in the phrase: *“[targeting the most] underprivileged members of society [particularly people with a disability]”* (Cited in Myers, 1977, p. 53). Problematically, in a review on poverty measurement, the Social Welfare Policy Secretariat (1981) did not recognise people with a disability in receipt of the Invalid Pension as group considered to be “genuinely deserving” (Brotherhood of St Laurence, 1980; Commonwealth of Australia, House of Representatives, 1981a, 1981b, 1981c).

### **iii. Ideology of disablism and disablist discourse**

Conservative paternalism operating with Commonwealth authority manifested differently in an effort by the Government to curb welfare expenditure and generate cost efficiencies. The constraints to welfare expenditure and concern for fraud were not new as demonstrated in Epoch One. However, in Epoch Two, the inadequacies of the existing income support system became the justification for the “crackdown” on so-called “fraudulent” claims. Thus, the ideology of disablism was perpetuated.

During Epoch Two the ideology of disablism contained the sub-themes of:

- crackdown on Invalid Pensioners;
- language of “fraud” and malingering; and

- “permanent meant just that”: Targeting the most genuine invalids.

### **Crackdown on Invalid Pensioners**

The Jordan (1984, p. 116) and Kewley (1980, p. 81) texts referred to the 1978 crackdown on Invalid Pensioners by the Commonwealth Police. An excerpt provides a description of the background context and implications of these actions:

*On the morning of 31 March 1978 police conducted a series of raids on homes and doctors' surgeries in Sydney. One hundred and eighty people, mostly of Greek origin and including six doctors, were charged with conspiracy to defraud, and some hundreds of invalid pensions and sickness benefits were suspended or cancelled. The alleged offences consisted of use of fabricated evidence in support of claims. The resulting legal proceedings were a prolonged and expensive fiasco. After five years nearly all charges had been dropped and no convictions had been secured. The episode ... [drew attention to the] fears it revealed [-] that the pension system was open to abuse and corruption, and that members of certain ... groups were getting more than they were entitled to, and because of the measures taken in an attempt to ensure that in future pensions would be received only by those legally entitled to them. (Cited in Jordan, 1984, p. 116)*

The notion of fraud was introduced into Parliament in 1979 by the Fraser Government against the backdrop of broader national and international changes in economic conditions. This above illustration shows the discursive formation used to justify the way the language of crackdown, based on the perception that increased numbers of Invalid Pensioners, was connected to instances of fraud and problems intrinsic to the income support system. The period signified greater targeting of income support recipients, particularly those persons in receipt of the Invalid Pension. The targeted policy measures reflecting discourses of “fraud” and “crackdown” indicate the social relations of power and ideology underpinning disability income support policy. The targeting of disability income support has been identified in the writings of Barnes and Mercer (2003), Clear and Gleeson (2002), Gibilisco (2005) and Priestley (2000), and is tied to the ideology of disablism.

During this epoch, connotations centred on the Invalid Pension being associated with rorting and malingering. In this construction, the notion of deserving of a pension is paradoxically associated with disability as an expense to and a burden on the capitalist system (Barnes & Mercer, 2003; Clear & Gleeson, 2002; Gibilisco, 2003). From this, the ideology of disablism is tied to the broader political economy of Australia and dialectical relations of policy language and practices.

### **Language of “fraud” and malingering**

Parliamentarians tended not to talk explicitly about “malingering” as such; rather they talked about and used the notion of fraud. Fraud for Parliamentarians was, in effect, a code for not working, and applied to citizens who were considered to be idle while in receipt of the Invalid

Pension, in effect a “dole bludger”. The entire debate centred on the question of deserving and non-deserving poor.

The data revealed that the connection between fraud and malingering became established in administrative protocols which asserted that when determining eligibility for the Invalid Pension precise measures of impairment must be used. For example, this connection is exemplified in the discursive frames: “*one must see precisely what medical impairment or disability he suffers*” (Case Extract, cited in Jordan, 1984, p. 226), and “[there needs to be a] *'distinction between a person who is sick and a person who merely thinks he is sick'*” (Case Extract, cited in Jordan, 1984, p. 218).

Another extract highlights the discursive formation and practices generating inferences of fraud concerning claimants:

*Were it not for [his] [sic] belief that he is an invalid... incapable of work, he has the physical capacity to undertake a wide range of unskilled jobs... If we felt that [his] perception of himself... was the product of a conscious and deliberate decision to present symptoms which would qualify him for an invalid pension, we would have no hesitation in rejecting his claim.* (Case Extract, cited in Jordan, 1984, p. 218)

In these accounts, malingering was defined by the Government in terms of an individual intentionally overstating the disability with a view to receive the Invalid Pension, as shown in this extract: “[the individual, thus presenting] *'false or grossly exaggerated... symptoms... in pursuit of ... [the Invalid Pension] is obviously recognisable'*” (Diagnostic and Statistical Manual, III, p. 331, cited in Jordan, 1984, p. 200). Here the term “false symptoms” denotes fraud. The concept of fraud in debates can be seen in the discourses of “*failed migrant syndrome*”, “*compensation (or pension) neurosis*”, “*bad backs*”, “*migrant backs*”, “*unjustified invalidism*” and “*gross malingering hysteria*”.

The idea of fraud was shown in other case examples (Cited in Jordan, 1984), where the Fraser Government assumed that some Invalid Pensioners were malingering, as shown in these extracts: “[person A sought to] *validate their sick role* [Case Extract, A, V81/529]”, and the “*principal barrier to employment is his [sic] adoption of a profoundly dependent sick role with much acting out of suffering incompatible with... work*” [Case Extract, Milanovic, N82/47]” (Cited in Jordan, 1984, p. 214). Another extract uses a discursive formation to draw connections between fraud, malingering and the Invalid Pension: “*‘relentlessly seeking a life of idleness. [The individual is] malingering and simulating a back injury’ ... and is motivated by the usefulness of pension eligibility* [Case Extract, Gaudnce, Z, 1975]” (Cited in Jordan, 1984, p. 90). Therefore, the assumptions underpinning the discursive formations in these cases suggested that an individual contributed to the “disabling condition” and idleness.

The presumption that an individual contributes to the disabling condition is also shown in the next case extract: “[he] *‘incapacitated himself permanently by persistent malingering’* [Case Extract, Gaudnce, Z, 1975]” (Cited in Jordan, 1984, p. 90). Even during instances where disabling conditions (labelled as “genuine disability”) were apparent, often assumptions were followed by paradoxical statements (Cited in Jordan, 1984, p. 197). For example, typical comments recorded included, “*there is certainly a lot of malingering, but no one knows how much*” (Ellard, 1970, *Medical Journal of Australia*, pp. 349-355, Cited in Jordan, 1984, p. 200). These discursive themes represent the constructions of people reliant on disability income support as malingering.

The potential for people with a disability to rort the system was demonstrated in an extract citing another trial: “*at four Melbourne Social Security offices in 1979. The original motive was again to see whether potential for rehabilitation could be identified and exploited*” (Cited in Jordan, 1984, p. 146). Here, claims are made that without tight eligibility requirements, the Invalid Pension would be open to abuse. The issue of bad backs was considered problematic for the Government in that it was difficult to quantify with medical evidence. Yet, the extracts reveal significant prejudice underpinning different cases, particularly during instances in which bad backs became synonymous with malingering, idleness and individual deficiencies. These points are illustrated in the case where an individual was found by Doctor Colville to be malingering: “[he is] *‘a malingerer [because of] ... evidence of use.... of his hands and feet and [an] absence of muscle wasting’* [Case Extract, Panagopoulos, V81/93] (Cited in Jordan, 1984, p. 212). Another case reveals the values underpinning medical assessments: “[the individual] *claimed to be disabled by a severe back condition but was a regular board surfer: [however] ‘with adequate motivation there is no.... bar to greater and more sustained physical and mental activity than is at present attempted’* [Case Extract, Jacks, W82/48]” (Cited in Jordan, 1984, p. 211). Metaphors, such as “*self-created invalid ... perfectly happy and content in his invalid status*”, “*assumed sick role of the failed migrant syndrome*” and “*only badges of respectability are his illness and pain*” were used to stigmatise Invalid Pension claimants (Cited in Jordan, 1984, p. 211). This viewpoint of an assumed sick role aligns with what Oliver (1996) and Barnes et al. (2002) describe as socio-medical interpretations of disability, which ignore the actual experience of disability. These disablist notions of the invalid status draw on the assumption that it is the individual’s moral failings (that is, malingering) that lead to people with a disability being reliant on the Invalid Pension, rather than conditions of the labour market or societal exclusion.

During the regime change, the fraud and malingering argument was used by the Government from 1975 onwards to justify inflation control and direct fewer resources to income support. The uncritical acceptance of labour market conditions concerning the rapid increases in unemployment is demonstrated in this extract: “[the] *rise in unemployment from 1974 onwards was accompanied by a sustained rise in grants of invalid pension*” (pp. 125-

126). A case extract from a Commonwealth medical examiner cited in Jordan (1984) demonstrated that for people with a disability in the 1970s, the labour market became a hostile environment:

*'Although it is possible to concede that there is a job that this man might be able to do... with his limited skills, training [and] education... he is essentially unemployable in the present labor market and... I do not expect his employability to improve but deteriorate.'* (p. 190)

Conventional wisdom was backed up by facts. Statistical figures of the high numbers receiving the Invalid Pension were used to justify Government response to the perceived threat of “blowouts” in income support expenditure. Another excerpt reveals the discursive theme of fraud: “[the Fraser Government declared] *fraud and fabricated evidence ... [to be] a serious threat to an administration having difficulty in coping with the enormous increase in unemployment*” (Cited in Jordan, 1984, p. 126). In this sense, people with a disability reliant upon the Invalid Pension were blamed for the high costs associated with welfare benefits and were constructed as a threat to society (Gibilisco, 2005). The meaning attached to this assumption is the perceived threat to so-called able-bodied productive citizens (Barnes & Mercer, 2003, 2005).

The emergence and constitution of the fraud and malingering discourses revealed a significant ideological shift. The introduction of the fraud discourse to parliamentary debates by the Fraser Government was in effect a powerful way to shift perceptions and gain alliances with the general population (Gramsci, 1977). The rhetorical device operated to promote the deserving and undeserving rhetoric. The notion of fraud, when used by the Fraser Government, medical examiners and the Police, and alongside the social practices of parliamentary debates and policing functions, strongly reflects the idea of bureaucratic centralism (Gramsci, 1977). In the construction of language of “fraud” and malingering discourse, bureaucratic centralism operated as a “policing organism” in which the hegemonic principles operated to create a dialectical relation of power and authority. This policing organism through bureaucratic centralism in turn functioned to produce and entrench dominance of the discourse of fraud and malingering (Gramsci, 1977). The use of fraud as a persuasive discourse cemented the connection between Invalid Pension, malingering and injustice. The hegemony is unlike earlier epochs. In this epoch, the enacting of legal mechanisms was designed to prevent fraud, while establishing genuinely looking for work as commonsense. This also helped establish the Government’s idea of fraud and language of malingering and genuinely looking for work as the accepted worldview (Gramsci, 1977). Essentially the discourses of fraud and assumptions of malingering became accepted hegemonically because they were afforded enough status as to appear ideologically attractive to the general public. This hegemonic feature represented a significant departure from earlier epochs.

### **“Permanent meant just that”: Targeting the most genuine invalids**

Using bureaucratic centralism and statistical data to reinforce the economic constraint claim legitimised Government intervention and suggested that the subsequent policy responses were non-negotiable. For the Government and public, accounting for labour market conditions and linking permanently incapacitated for work with socio-economic factors, led to over-granting of the Invalid Pension. The significance of this point is that it provides an additional element to the context of this study. No longer would the conditions of the labour market be considered a factor influencing decision-making during assessment. The next extract illustrates this discursive frame in the narrowing of disability eligibility. Following legal counsel in 1979 on statutory obligations, the Senior Officers in the Department of Social Security were directed to ignore social and labour market factors:

*'It must be impressed on all people handling invalid pension claims that the state of the labor market must be disregarded... Incapacity is to be ascertained with respect to the assessed incapacity of each claimant to do work of the kind for which he might be qualified apart from his incapacity. The availability of such work is irrelevant.'* (Cited in Jordan, 1984, p. 126)

Any reference to social, economic or environmental impactors was considered pejorative, as seen in this phrase: “*unauthorised gloss*” (Cited in Jordan, 1984, p. 131). Using other phrases such as “[the Government has ruled that] *the state of the labor market was to be disregarded ... [and] 'permanent' meant just that*” (Cited in Jordan, 1984, p. 131), the impetus for targeting the most genuine invalids was surmised on the ideological assumptions associated with claims of high numbers of unemployed and presumed high numbers of people receiving the Invalid Pension.

The critical point captured in the discursive formations was the contradiction between the overt ideological attack via the use of “state of the labor market” clause (Line two in the Jordan, 1984 excerpt) and the actual state of the labour market, that is, administrative officers needed to disregard economic factors such as “the availability of work” (Line four, Jordan, 1984) when determining eligibility for the Invalid Pension. This discursive theme is illustrated in an extract from the *Sydney Morning Herald* (1981) which reported the concerns surrounding eligibility for the Invalid Pension. The article reported that the:

*Department [of Social Security] assessed ... [a claimant] who suffers a back condition, as being only 60 to 65 per cent physically incapacitated, and therefore ineligible. It took no account of the degree to which his physical incapacity reduced his chances of getting a job.* (Cited in *Sydney Morning Herald*, 1981)

Another extract in the article exemplified the discursive theme of concern for fraud, disability and tighter targeting of most genuine invalids:

*In doing this, it has helped clear up doubts that remained following Senator Chaney's announcement earlier this year of changes to the department's guidelines ... [in relation to] granting [Invalid] pensions, especially since 1978, as a consequence of a secret instruction from the former Director-General of Social*



*Security, Mr Pat Lanigan. This instruction ... was that medical factors alone were to be considered in determining incapacity. As a result of it, innumerable pensions were reviewed and cancelled, and others denied. (Cited in Sydney Morning Herald, 1981)*

The above extracts highlight the secrecy surrounding the implementation of guidelines and reflected the hardline approach of the Fraser Government. The implication of this finding is the way the hardline approach ignored the capacity for people with a disability to actively engage in the labour market where no jobs were available. The exclusion of people with a disability in receipt of disability income support from the labour market has implications in terms of their citizenship. People with a disability in receipt of disability income support are relegated to the margins of society, whereby structural barriers have prevented people with a disability from engaging in paid employment (Barnes & Mercer, 2005; Gramsci, 1977). This marginalising consequence can be seen in the Fraser Government call for increased participation in the labour market, yet the government provided no recognition of the obstacles that prevented such participation, such as high unemployment rates. Thus, people with a disability in receipt of the Invalid Pension are constructed as “unproductive” and “in need” (Barnes & Mercer, 2005). This inequitable outcome relates to what Barnes and Mercer (2005) recognised as the presumption of individual failures contributing to their situation of social exclusion, unemployment and reliance on disability income support, as opposed to wider socio-economic barriers preventing access to the labour market.

The narrowness of the eligibility criteria coupled with conservative paternalism excluded people assessed as below this stringent percentile of 85 per cent. The implication of the discursive frame is captured in an extract from the *Sydney Morning Herald* (1981):

*By this narrow reckoning, a person who had lost a leg and an arm could not qualify for a pension because he still possessed 50 per cent of his limbs. What chance would such a person have of employment? The answer is self evident – virtually nil in today's market. By rejecting this insensitive and unrealistic interpretation of incapacity, the tribunal has helped restore commonsense and humanity to what has been an unhappy area of Government administration. (Cited in Sydney Morning Herald, 1981)*

Although the article referred to the return to “commonsense and humanity” (*Sydney Morning Herald*, 1981) of previous governments, the Fraser Government upheld the narrow definition and the genuinely needy ideology. Rather than pulling back from this stringent approach, the Fraser Government's new policy platform adopted a hardline approach. This idea of a hardline approach is communicated in an excerpt from the *Northern Territory News* (1982): “[the Liberal Party adopted a] *tougher line on social security payments saying they should be needs-based and related to the country's ability to pay*” (p. 18). Pursuing the tough line approach, the Fraser Government then sought to only help the “genuinely needy”. This discursive formation of genuinely needy is reflected in the following extract from *Northern Territory News* (1982) which reported: “[the Fraser Government] *assist[ed] those in greatest*

*need [and called] for individuals and families to provide for themselves at least a basic level of income"* (p. 18). Clear and Gleeson (2002, p. 42) described these punitive authoritarian approaches coupled with conservative paternalism and the drive for even more stringent controls in terms of a product of "disabling policy culture" which established ableism as the norm. Thus, disablism occurs as a result of the ideology of bludger being taken to the extreme and used to justify the tightening of the Invalid Pension.

## **Epoch Two Summary**

The attacks on the welfare state in the post-1970s are a far cry from the original intent of the Invalid Pension. Originally (albeit somewhat paternalistically), the Government's political belief encapsulated the provision of income support to people with a disability or specifically, those less fortunate. Even with Commonwealth authority and conservative paternalism, the Invalid Pension was considered an entitlement in the first part of Epoch Two. Earlier depictions of the Invalid Pension saw the provision as a means of subsistence for disability pensioners. Yet, in the latter parts of Epoch Two, this notion of entitlement changed to a concern for genuinely unemployed, fraud and malingering. In Epoch Two, the discourses of plight of the invalid were replaced with the language of the most unfortunate and genuinely unemployed. The formation of a historic bloc and bureaucratic centralism perpetuated the hegemony of economic fundamentalism, language of fraud and the malingering discourse. There is some evidence to suggest that through the discursive formations of Commonwealth authority that the authority remained unquestioned in its regulation of Invalid Pensioners.

Commonwealth authority operating in conjunction with conservative paternalism functioned to target the disability income support system and oppress people with a disability. The emergence of economic fundamentalism as new hegemonic project and associated language constructions during the 1970s served to generate a harsher environment for people with a disability in receipt of the Invalid Pension (Gramsci, 1977). Disablism was manifested in the tighter targeting of the Invalid Pension and the move away from considering the condition of the labour market during assessment. The discursive formation of permanently incapacitated for work and orders of discourse in speeches (dialectics, and discourses linked to broader social conditions) generated assumptions that people with a disability were "incapable" of working in the labour force (Gramsci, 1977, 1996). However, the discursive themes of fraud and malingering reinforced the suggestion that only the genuine invalids are entitled to the Invalid Pension.

There was evidence of disablism in the interconnection between the dialectical relations of the Invalid Pension legislation (where legislation, policy principles and administrative practices determined the criteria for eligibility) and orders of discourse (hegemonic effects of the language). The language also promoted moral distinctions between the so-called able-bodied and disabled (Stone, 1984). The emphasis on permanently incapacitated for work

was constructed as a literal interpretation in an effort to reduce the cost of welfare. The income support system for people with a disability became disabling when entitlement to the pension payment is constrained through tighter eligibility requirements (Barnes & Mercer, 2003). The discourses concerning the problem of fraud and malingering further entrenched the disabling nature of the entitlement. These frames reinforced disablism through the discourses of “targeting the most genuine invalids”. Hence, disablism is perpetuated by the disabling nature of disability income support, given the connection to neo-liberal efforts aimed at reducing welfare expenditure.

#### **4.4 Chapter Conclusion**

In Epoch One, Commonwealth authority was manifested through the new powers afforded to the Commonwealth, together with regulatory controls for people with a disability in receipt of disability income support. Conservative paternalism emerged in the idea that the Invalid Pension was a kind of charitable dole. The way Commonwealth authority and conservative paternalism operated perpetuated the ideology of disablism. In Epoch One, the language of plight of the invalid was connected to individual-dysfunctional and charity theories of disability. A hegemonic project and moral transition occurred in Epoch Two. In the latter parts of Epoch Two (1970s onwards), for the Government in power, the notion of entitlement changed, even though public perception continued to regard disability income support as an entitlement. This moral transition identified in Epoch Two represented a change in the prevailing dominant hegemony (Gramsci, 1977, 1996). It was not until policy changes apparent in Epochs Three and Four that public attitudes became much harsher, a trend that is further detailed in these epochs. The next chapter, Chapter Five, examines the changes to disability income support policy during Epoch Three (the Hawke-Keating era) and Epoch Four (The Howard Era).



## CHAPTER FIVE

### Epoch Three: A Liberalising Change and Epoch Four: The ‘Disabled Bludger’

#### 5.1 Introduction to the Chapter

Chapter Five presents the findings from the analysis of Australian disability income support encompassing Epoch Three (1986-1995) and Epoch Four (1996-2007). As with the Chapter Four findings, three core themes were identified that occurred across each of the epochs. These were:

- i. *Commonwealth authority: Power of the State to intervene and control of people with a disability, coupled with*
- ii. *Conservative paternalism discourse involving charitable and punitive values, resulting in*
- iii. *Ideology of disablism and disablist discourse.*

This chapter provides a chronological account of the historical assumptions and ideological dimensions underpinning Australian disability income support. The themes and sub-themes emerging from the data are examined in Epoch Three (1986-1995), a ‘liberalising’ change? Activ[e]ating the Disability Support Pension and Epoch Four (1996-2007), the ‘disabled bludger’: A shift from plight of the invalid and genuinely unemployed. A concluding discussion is included at the end of the chapter, bringing together the key insights emerging from Chapter Four and Chapter Five.

#### 5.2 Epoch Three - 1986-1995: A ‘Liberalising’ Change? Activ[e]ating The Disability Support Pension

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##### Introduction

Epoch Three comprises the same themes of Commonwealth authority and conservative paternalism resulting in the ideology of disablism identified in Epochs One and Two. What is different in this epoch is the way in which the changes to disability income support policy and legislation were framed in terms of a social justice strategy, yet the eligibility requirements and language retained the ideological assumptions identified in Epochs One and Two, thereby perpetuating disablism. For example, the then incoming Hawke Government in Epoch Three emphasised a “fair go” for all people, yet continued the same Commonwealth authority, and conservative paternalism discourse in Epochs One and Two. The discourses revealed that the Hawke-Keating Governments in Epoch Three applied a carrot and stick approach to people with a disability in receipt of the Invalid Pension (later renamed Disability Support Pension). The following section examines the themes and sub-themes central to

Commonwealth authority (Power of the State to intervene and control of people with a disability), conservative paternalism discourse (involving charitable and punitive values), and the ideology of disablism and disablist discourse.

**i. Commonwealth authority: Power of the State to intervene and control of people with a disability**

Riding on the back of the Fraser Government policy approach, during the mid 1980s, the Hawke Government pursued austere economic policies to deal with changing labour markets and socio-economic conditions (increased unemployment, global pressures, deregulation and contraction of work opportunities). The sub-themes underpinning the Commonwealth authority in Epoch Three incorporated:

- broader political context: Limiting disability income support expenditure;
- Commonwealth authority and the social justice ruse;
- Invalid Pension as a disincentive to work: From entitlement and “workforce incapacity” to proving capacity; and
- an enabled active citizen: Emphasising labour market potential.

**Broader political context: Limiting disability income support expenditure**

External pressures on the Commonwealth emerged from increased globalisation and unemployment rose to 7.8 per cent (Dowse, 1991, p. 7; Pullan, 1984). The period reflected a move away from full-employment policies to policies that aimed for low levels of unemployment (Pullan, 1984). Such influences of global neo-liberal policies were not new, as indicated in Epoch Two, where the Fraser Government adopted a similar stance.

However, rather than reject neo-liberal policies, the Hawke-Keating Governments embraced these policy ideals as seen in the measures such as floating of the Australian dollar and the ACCORD agreement (Jordan & Commonwealth of Australia, 1994). Figure 9 depicting Paul Keating (then Treasurer), satirically captures the dialectical relations and tensions underpinning the economic conditions of the mid 1980s where “interest rates were down” the “dole queue” grew exponentially. The reader is alerted to the socio-historical conditions defining this epoch, that is, the impact of external factors (deregulation) on internal elements (unemployment) (Gramsci, 1977). This signifier reflects the relationship of disability income support in relation to the broader political economy of Australia.



**Figure 9:** 'Happy days are here again' [Paul Keating singing to dole queue [picture]]. Cartoon created by Moir, Alan. Reproduced courtesy of the National Library of Australia <http://www.nla.gov.au/pict/pic><sup>32</sup>

The broader socio-historical conditions underpinning Epoch Three represented attempts by the Hawke-Keating Governments to hegemonise particular principles for shaping the nature of the Australian disability income support system (Gramsci, 1977, 1996). The push for neo-liberal policies is found in instances whereby the Hawke-Keating Governments rearticulated the meaning of the disability pension. This reflected a new hegemonic project (Gramsci, 1977). The following extract by the then Social Security Minister, Brian Howe (2004) captured the broader political context. Howe argued that during this period (1980s):

*Australian governments increasingly practiced expenditure restraint (social expenditure in most OECD countries had grown strongly through the post war years) along with the need to adjust to increased global competitiveness. The shift towards a more open economy tended to work against employment in manufacturing industry with more jobs in the service and information economies.*  
(pp. 8-9)

Here, Howe (2004) reflected on the changing nature of income support policies and the Government balancing socio-economic change while subscribing to economic ideals. It was during Epoch Three that people with a disability reliant on income support experienced hardship as a result of the Hawke-Keating Governments' policies. The consequence of these broader political influences was the shift in limiting the disability income support expenditure and encouraging greater employment participation. The orders of discourse contained in the speeches by politicians in the Hawke-Keating Governments and policy commentators were significant in terms of the social changes that resulted. Commonwealth authority was discursively re-constituted under the pretext of a social justice strategy for disability income support policy.

<sup>32</sup> Cartoon published in 1986.

### **Commonwealth authority and the social justice ruse**

It was within this broader policy context that the Hawke Government contracted Cass et al. (1988) to conduct the Social Security Review (1988) of the disability income support system, referred to in social policy literature and in this thesis as the Cass Review (1988). A unique feature of Epoch Three was the strengthening of Commonwealth authority and hegemonic project through a neo-liberal reformist strategy, under the guise of a rights agenda. Impetus for changing disability income support derived from the Cass Review (1988): *“this issues paper is concerned with identifying new directions for reform of social security arrangements for people with disabilities”* (Cited in Cass et al., 1988, p. 18). The then Social Security Minister Howe (1989) drew heavily on the Cass Review (1988) recommendations and adopted some of the integrated disability measures as part of promoting welfare changes. The Cass Review (1988) did provide the Hawke Labor Government with the impetus to change the nature of the income support to people with disabilities. Such was the influence of hegemonic principles many of the value based assumptions were adopted by the Hawke Government, for example, the push for greater incentives (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe).

The official parliamentary discourses of the Hawke Government sought to combine hegemonic principles with the discourse of the Cass Review (1988) in order to establish credibility and authority (Gramsci, 1977, 1996). Howe and the Hawke Government used the language of social justice to sell the idea of a liberalised disability income support system. Framing the liberalising change in terms of social justice assisted the attempt to generate greater acceptance of the policy change. In order to achieve legitimacy of the policy, the Hawke Government needed to engender a shared vision of the change. The following discursive frame from a parliamentary speech demonstrates the visioning:

*As we move into the 1990s, the challenge is for all Australians to shed their prejudices and change their restricted thinking so that we can share a vision which will provide real choices for people with disabilities.... We are at another important milestone on the road towards a new system.* (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe)

Here, the frame presents the Hawke Government as authoritative and inclusive, which in turn provides the means for securing the political intuition of the leader as the primary authority in making economic changes to the disability income support system (Gramsci, 1977). The dominant frames of shared vision and real choices secure Commonwealth authority by constructing a unified and just national identity necessary for the transformation of disability income support policy. The frame asks the reader to become a part of the change strategy (solidarity) through a shared vision (structured and coherent common world view) (Gramsci, 1977). Thus, the discourse, as a form of passive revolution, helps secure acceptance of the hegemonic change.



In espousing the rights approach, the pursuit of social justice becomes the cornerstone concept in establishing a shared approach. The notion of social justice is used in parliamentary speeches as an empty signifier (Fairclough, 2003), as shown in the following extract:

*The vision is of a new system which more actively encourages independence for people with disabilities; a more humane system with better community understanding of basic human rights which apply equally to people with disabilities; a system with integrity, providing comprehensive assistance.* (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe)

The above account communicates an inherent contradiction whereby social justice discourse is coupled with a push for individual self-reliance. Social justice as an empty signifier applied in official discourse allows for the espousing of fairness and justness of the disability income support policy by the Government. Thus, this device helps to present the Government as humanitarian and caring. The social justice discourse is used to inform the general public of economic and social benefits that will result if they invest in this vision. The relationship between the public and people with a disability is touted as contributing to the good of all people. Thus, when social justice discourse is used as an empty signifier, the policy proposal becomes ideologically desirable to the general public (Gramsci, 1977). However, while social justice presents as a universal right and 'given', it obscures the struggle with other social forces (economic fundamentalism). The discourse functions to conceal the independence and self-reliance frames which in turn privileges economic ideals, (for example productivity and labour market inclusion), as the desirable aspiration. The contradiction demonstrates the dialectical relations of power and ideology whereby social justice is incorporated into the discourse, yet the economic ideals contend for dominance and acceptance.

A later Hansard speech by Howe also communicates the way global social forces have shaped the Australian social and political landscape, which in turn influenced the visioning process. In situating the Government's values alongside social justice discourse, the parliamentary speech communicates the interconnection between problem, authority, responsibility and regulatory control:

*The Labor vision of a socially just society is one where all Australians can share equitably in the distribution of resources, especially employment opportunities. In a society that revolves around the activities of production and consumption, those who are denied participation in the work force are fundamentally marginalised.* (Commonwealth of Australia, House of Representatives, September 5, 1991a, p. 788, Howe)

Although the vision is couched in terms of a "socially just society" (Line one in the Commonwealth of Australia, 1991a excerpt), the excerpt also suggests that Commonwealth authority is confined to economic considerations and intervention is circumscribed by compelling people with a disability to participate in society via employment opportunities.

This claim of a socially just society allows for implementing a compulsion mechanism in disability income support policy. Here, the assumption is made that society will benefit from people with a disability participating in employment, rather than languishing on disability income support (Gramsci, 1977). In effect the ideals of social justice were at odds with the underpinning economic ideals of the policy, such as productivity and efficiencies. The economic principles helped to secure the logic of economic fundamentalism and functioned to reify the deficit model of disability, that is, increasing the emphasis on individual functions, rather than exploring structural barriers to employment.

### **Invalid Pension as a disincentive to work: From entitlement and “workforce incapacity” to proving capacity**

Securing Commonwealth authority by strengthening the connection to productivity was a feature in the Hawke Government parliamentary speeches. The following excerpt demonstrates the emergence and constitution of greater connections to labour market participation: “[the Government has] *already undertaken far-reaching reform* [and the] *next stage of the Government's reform of disability programs involves income support arrangements and their links with rehabilitation and labour market programs*” (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe). This account signifies a subtle shift in Commonwealth authority. When governments speak of “social reform”, they are really just making insignificant or token changes to the policy; that is, the basic tenets of Commonwealth authority stay the same, even where they manifest slightly differently (Gramsci, 1977). Further, the inequitable system remains the same. Where changes are made, they are not always for the benefit of people with a disability.

This form of hegemonic maintenance (social reform) is highlighted in the frame detailing the potential nature of changes: “*the payment [would be] ... concerned not only with income support in the traditional sense but with providing the opportunities for ... the enhancement of workforce capacity* [and that] *the receipt of a disability payment does not connote the end of labour force participation*” (Cited in Cass et al., 1988, p. 179). Another extract indicates the transformative aspect of the change to Commonwealth authority concerning disability income support: “*we linked these reforms to a reshaping and a clarification of the role of the Commonwealth*” (Commonwealth of Australia, House of Representatives, September 5, 1991a, p. 788, Howe). Thus, these accounts offer different manifestations of bureaucratic centralism where historically dominant hegemonic principles (original eligibility criteria) operate alongside and within the confines of the new legality to uphold Commonwealth authority (Gramsci, 1977). This expression of Commonwealth authority in turn attempts to progress the advancement of transforming the disability income support system through the “disability reform agenda” strategy. As a somewhat complex representation of change, the discourse in the above extract relies on the assumption “providing the opportunities” for greater labour market participation to transcend the established order and separate it from

traditional responses (Gramsci, 1977). This rhetorical device makes it ideological in the sense that it seeks to employ a different interpretation of disability income support policy, while simultaneously maintaining dominant hegemonic principles (Gramsci, 1977, 1996).

Paradoxically, the official discourses pointed to the assumption that the exclusion of people with a disability from the labour market was a direct result of the endurance of the permanently incapacitated for work eligibility requirement as shown in this extract: “*despite the many ... changes which have occurred since ... [the introduction of the Invalid Pension in 1908] the eligibility criteria ... [has] remained largely unchanged since its implementation in 1910*” (Cited in Cass et al., p. 1; see also Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe). However, a contradiction emerges whereby the policy report sought to maintain the original sympathetic approach to assessing for Invalid Pension adopted by the Fisher Government in Epoch One, thus adhering to traditional policy.

In securing a new interpretation of Commonwealth authority, the discourses of “workforce potential” and “employment capacity” contained in official policy discourse were designed to function as a preventative from “workforce incapacity”. This discursive frame became the platform for advocating a policy change to the Invalid Pension, as emphasised in this statement:

*The need for income support which provides the conditions for economic security and dignity is especially highlighted where it is likely that a disabling condition will cause workforce incapacity for a long period of time and therefore where time spent in receipt of income support is likely to be of a long duration.*  
(Cited in Cass et al., 1988, p. 2)

Using the discourse of workforce incapacity to secure a discursive space, the Invalid Pension was posited as not only discouraging people with a disability from entering the workforce, but also hiding people (generally unemployed males over fifty years of age) perceived as having some capacity to work. The constitution of economic principles in Epoch Three is unlike those identified in the latter part of Epoch Two. In Epoch Three, the contextualisation and recontextualisation of economic principles occurred through the explicit use of the frame, enhancement of workforce capacity.

The repetitive use of the terms, economic security and dignity in conjunction with workforce capacity discourse, throughout parliamentary speeches and policy reports helped cement the contention that adequate income support could only be achieved through the ideal of maximising an individual’s potential for work. The interplay between the term workforce capacity and economic principles denotes economic fundamentalist and individualistic notions, at the expense of social citizenship and social participation. Thus, the thrust of the workforce capacity/workforce incapacity dualism was the intentional pursuit of changing the traditional provision of income support (new hegemonic project). The alternative vision

suggested in the above discourse centred on increasing the participation of people with a disability in the labour market. In this sense, the policy language functioned to form stronger connections between the disability income support system and labour market programs.

The next excerpt captures the discursive formation which legitimises Commonwealth authority in taking action for reducing labour market barriers: “equity and adequacy of income support [emphasis in original] – *to provide the basis for economic security and dignity for people with disabilities which substantially restrict their workforce and earnings capacity*” (Cited in Cass et al., 1988, p. 18). Here, the enhancement of workforce capacity discourse functions to counter the notion of workforce incapacity. As an organic ideology, the discourse of workforce capacity, as an antithesis to workforce incapacity, gives rise to the construction of people with a disability in terms of having to prove capacity for work (Gibilisco, 2005; Oliver, 2009).

The discourses of workforce capacity and proving capacity included discursive formations that suggested the need for reducing barriers through the labour market initiatives embedded with incentives. An extract revealed the policy objectives of increasing workforce capacity and reducing restrictions:

*minimising disincentives and maximizing opportunities for participation in education, training, employment and community activities* [emphasis in original] – *commensurate with the resources and aspirations of people with disabilities.* (Cited in Cass et al., 1988, p. 18)

The above discursive frames suggest that the traditional expression of the disability income support system is a disincentive to finding employment by people with a disability in receipt of the Invalid Pension. The incentive argument was not a new concern (as other epochs have revealed). Of importance here is the shift away from the Invalid Pension as an entitlement to Invalid Pension as a contributing factor in the social and labour market exclusion of people with a disability.

The following extract reveals the way the incentive argument in Epoch Three further shaped official discourses and public perceptions about the Invalid Pension:

*One of the more likely routes into ... invalid pension is application for a disability related payment after a period in receipt of unemployment benefit and fruitless job search. This may effectively reduce employment prospects even further ... [as] there is little priority currently given to placing people receiving these payments in employment or in labour market programs to enhance employability. Their own perception and that of the community generally is that they are outside of the labour force.* (Cited in Cass et al., 1988, p. 70)

The above illustration points to the rhetorical devices used to secure legitimacy for transforming the disability income support system through incentives. This legitimising device can be seen in the terms such as “fruitless job search” (Line three in the Cass et al.,

1988 excerpt). The claim that the inhibiting factors of labour market exclusion through Invalid Pension payment being important policy considerations can be open to challenge. However, the official discourses used evidence drawn from research to give credibility to the argument. Thus, by presenting the findings and policy stance as logical fact parliamentarians and policy analysts can draw greater support for the approach.

The discourses of workforce capacity and strengthening labour market programs revealed the call for re-structuring income support to people with disabilities. The policy was concerned with redressing disincentives that inhibit the capacity for people with a disability to participate in employment, labour market programs and the community. Within the discourses, there was an inherent tension between maintaining traditional policy principles, yet advancing economic fundamentalist ideals.

### **An enabled active citizen: Emphasising labour market potential**

The enabled active citizen discourse was a typical feature of parliamentary speeches in Hansard (for example Commonwealth of Australia, House of Representatives, September 5, 1991a, p. 788, Howe and Commonwealth Australia, House of Representatives, June 4, 1991b, p. 2823, Howe). Increased media attention provided editorial support. The *Sydney Morning Herald* reported:

*The last thing that a person with a physical disability needs is an extra handicap erected by the tax and social security systems. Yet that is precisely what most face.... The 'withdrawal rates' ... [people with a disability] would face under the current social security system [if undertaking part-time work] are so savage ... [they] would lose 74 cents for every extra dollar earned. The trouble is that Australia's tax and social security systems tend to push people with disabilities out of the work-force. However, the Federal Government's social security review team, led by Professor Bettina Cass, believes it has devised a system which will do precisely the opposite. (Cited in Thornhill, 1988, p. 22)*

The above extract gives credence to the dialectical relations in the production of the enabled active citizen discourse. The findings and recommendations outlined in the Thornhill (1988) article functioned to legitimise changes by the Hawke Government to the disability income support system. The discursive formations of the enabled active citizen discourse builds on the workforce and incentive arguments to present a legitimate change strategy.

The following extract outlines the advantages of an intervention based on enabling people with a disability in receipt of disability income support:

*It is the Government's belief that, by enabling people with disabilities to participate fully in society, benefits accrue not only to the individual and his or her family, but also to employers, the economy, and ultimately society as a whole. (Commonwealth of Australia, House of Representatives, September 5, 1991a, p. 788, Howe)*

According to the logic of the above extract, an enabled active citizen policy provides incentives through tighter eligibility requirements and labour market initiatives. Disability became constructed in terms of being enabled to become an active participant in the labour market. As a discursive formation, the idea that people with a disability needed to be “enabled” perpetuated the power and authority of the Commonwealth.

The changes for the Hawke Government centred on the incorporation of economic fundamentalism ideology into disability income support policy. The policy trajectory of the Hawke Government comprised a neo-liberal and conservative economic welfare agenda tied to the broader Australian political economy. Howe (2004), later reflecting on the policy imperatives of the mid 1980s, explained:

*Through the eighties unemployment remained at historically high levels.... In an era in which economists emphasised the need to achieve higher levels of productivity and efficiency from the work force those in the labour market who were disadvantaged in any way would suffer a reduced demand for their services. Work intensification did not favour the disabled.* (pp. 8-9)

Thus, the downside of the enabled active citizen argument and securing Commonwealth authority, is that the vision did not take into account the actual state of the labour market in which high unemployment and inflation prevailed. Howe and the Hawke Government were strong proponents of embedding neo-liberal economic ideals through economic fundamentalism discourse. The grand narrative presented in the above extract revealed the emergence and constitution of the new economic policy regime relating to disability income support. In line with broader social forces, the economic change occurred through institutionalising neo-liberal principles into disability income support policy. Yet, the shift to a greater reliance on economic ideology in disability income support policy necessitated more than just hegemonic visioning on the part of the Government. The shift relied on reorganising institutional practices and social formations, together with instituting structured changes to the legislative framework (Gramsci, 1977). This transformation occurred through the use of political, intellectual and moral elements of Commonwealth authority.

Another discursive frame brings structured coherence to the notion of change whereby the social policy trajectory followed the ideology of economic principles: “[the policy aim is to help disability pensioners] *achieve financial independence and to improve their employment prospects*” (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe). In this excerpt, the nature of Commonwealth authority alters to one of minimal Government intervention through the discursive theme of individualised choice and economic opportunities. In turn, the appeal to the public for help absolves the Government of any responsibility for the outcome, particularly if change does not occur.

The enabled active citizen discourse suggested that traditional disability income support has been passive as the pension provision contained no incentives for people with a disability to

transition to employment. Implementing organic change to institutional practices and social formations underpinned the concern for the Hawke Government on the way the Invalid Pension was perceived to encourage a passive welfare system. The following extract demonstrates the strategy for producing change through the repetitive use of specific discursive formation whereby an active disability income support system rejects people with a disability as passive recipients: “[an active disability income support policy] *emphasises our [Hawke Government] commitment to enabling policies that will assist people with disabilities to maximise their work force potential and participate more fully in Australian social and economic life*” (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe). The enabling policy discourse denotes the passive/active income support dichotomy, whereby employment is upheld as the ideal form of participation in society. In aligning the vision with decisive leadership, the Hawke Government created a space for transforming the nature of disability income support system through legislative changes.

Commonwealth authority and enabled active citizen discourse appears in the change from the Invalid Pension to the Disability Support Pension. The most notable change to the Invalid Pension was the introduction of the Disability Support Package Legislation in 1991 by the Keating Government. The Disability Support Pension superseded the Invalid Pension (Australian Capital Territory Council of Social Service, 1991a, [ACTCOSS]). The underlying aim of the Disability Support Package (1991) legislation was to generate an active support provision for people with long-term or permanent disabilities who were unable to work full-time. The implementation of the Disability Support Pension occurred during a period of high unemployment (10 per cent unemployment rate) (ACTCOSS, 1991b, p. 3). The Disability Support Pension became the mechanism to enhance and promote active employment in terms of participation. The following extract demonstrates the hegemony of the legislation in reducing long-term social welfare expenditure in income support and lowering the perceived dependency levels on income support payments:

*The establishment of the new disability support pension, today being the first day of its operation.... The change not only in the name but also in the essential criteria for assessment of pensions for those with disabilities represents a very historic change. It is historic essentially because it throws the emphasis more on the capacities of people with disabilities than on their incapacities, more on their abilities than on their disabilities; that is, in the assessment of people for payments for social security, the level of impairment needs to be assessed and is very important.* (Commonwealth Australia, House of Representatives, June 4, 1991b, p. 2823, Howe)

The discourse used by Howe (1991, Commonwealth of Australia, 1991b) communicates the social relations of power and ideology and bureaucratic centralism as demonstrated in the historical value of the legislative change (Gramsci, 1977). As this illustration reveals, what distinguished the Disability Support Pension from the Invalid Pension was that the Invalid Pension focused solely on the permanent nature of disability and the presumed incapacity or inability of an individual to return to the workforce, whereas the measures of eligibility under

the Disability Support Pension centred on the capacity of an individual with a disability “to work at least 30 hours per week” (ACTCOSS, 1991c, p. 13). Further, there was the “two year rule”, whereby applicants had to demonstrate they were unable to work full-time for a period two years and beyond. If applicants were deemed capable of working up to 30 hours per week, they could receive the Disability Support Pension, yet they needed to fulfil other eligibility conditions (ACTCOSS, 1991c; Carney, 1991). Therefore, another signifier of the enabled active citizen theme was found in the reciprocal obligation discourse. The assumption underpinning the reciprocal obligation discourse was the expectation that people with a disability receiving the Disability Support Pension had an obligation (in reality, a duty) to contribute by looking for work. In this discursive formation, a reciprocal contractual relationship implied a mutual exchange for the benefit of each party in that arrangement. Yet, in reality there was no reciprocal or mutual exchange within that relationship.

The enabled active citizen discourse interacted with a new legality and institutional practices through rearticulating the eligibility criteria and adding requirements. However, the disability income support system maintained many of the existing assessment arrangements and ideologies. The idea of an historic moment in time further legitimised the commonsense nature of the change, thereby gaining support for the transformation of the disability income support system (Gramsci, 1977).

## **ii. Conservative paternalism discourse involving charitable and punitive values**

Conservative paternalism discourse functioned in this epoch with the Government paternalistically assuming that people with a disability reliant upon disability income support required some form of incentive to work. Further, the presumption centred on the need for a reciprocal obligation on the part of people with a disability. Thus, four sub-themes were identified in Epoch Three, under the theme of conservative paternalism discourse:

- “moralizing discourse”: Preventing the dependency of the habitual malingerer;
- conservative paternalism and disablist language: Reifying dysfunctions;
- “new medicalised criteria” and the punishment of disability pensioners; and
- counter discourse to the enabling disability policy.

### **“Moralizing discourse”: Preventing the dependency of the disabled “habitual malingerer”**

In the shift away from full-employment policies, the Hawke-Keating Governments used a “moralizing discourse” to prevent so-called welfare dependency of people with a disability in receipt of disability income support. The construction of reliance on disability income support as a negative connotation was evidenced in an excerpt from the Cass Review (1988) which indicated that:



*A major development ... [of] invalid pension ... in recent years has been the increasing number of people whose circumstances bring them into reliance on these forms of income support.... Greater reliance on ... invalid pension may reduce future labour force opportunities for those who are able ... to re-enter gainful employment. (Cited in Cass et al., 1988, p. 61)*

In this account, the idea of being reliant on disability income support is constructed as a negative representation. Thus, negative representations generated assumptions that people with a disability in receipt of disability income support somehow lacked the motivation to find employment. From this, an assumption using the term “gainful employment” (Line five in the Cass et al., 1988 excerpt) is generated in which productive people are those individuals who are employed. Hence, productive employment is established as the ideal and a worthy goal, in contrast to the negative: bludging on the disability income support system.

The claim of the connection between disability income support and labour market exclusion is further supported by the discourse of inequities in the disability income support system, evident in the frame: “*since the early 1970s there has been a significant increase in the level of dependence on invalid pensions*” (Commonwealth of Australia, House of Representatives, December 30, p. 3264, Howe). In this illustration, “reliance on Invalid Pension” becomes synonymous with welfare dependency, as opposed to Invalid Pension as an entitlement. Another extract highlights the moralizing discourse and the myth generated from such claims: “*once they are on invalid pension it is very difficult for them to move off this form of economic dependence*” (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe). Thus, connotations of welfare dependency were established, with the main policy aim being to reduce welfare dependency and increase productivity.

Although in Epoch Two, the Fraser Government introduced neo-liberal principles into disability policy, it did not in effect constitute a purely hegemonic transformative change. It was not until Epoch Three in which the embedding of neo-liberal principles, together with the changing nature of the labour market (for example high levels of unemployment and deregulation) generated a hegemonic transformation to the disability income support system. Epoch Three represented the most significant historical bloc given the way disability and income support policy was positioned alongside economic ideals (Gibilisco, 2005; Gramsci, 1977).

The function of the moralizing discourse underpinning the Hawke-Keating Governments policy approach served in part to redefine the relationship between those persons in receipt of disability income support, the Commonwealth and the community (that is, taxpayers) (Gramsci, 1977, 1996). The assertion of reliance redefined as welfare dependency compares people with a disability against so-called able-bodied citizens. Thus, these discursive formations pitted the Disability Support Pension recipients against the rest of the assumed productive community, legitimising conservative paternalism and moralizing

discourses. The moralizing discourse of welfare dependency shifted the blame for unemployment onto with people with a disability reliant on disability income support because they were somehow idle or deficient.

The construction of disability pensioners as reliant was further perpetuated by referring to large numbers of people receiving the Invalid Pensions and the reasons for the increase:

*The increases in numbers cannot be accounted for simply by changes in the incidence of disability. In fact, it appears that many people receiving these payments have been cast adrift by structural changes in the labour market... Under current arrangements the overwhelming majority of these will spend the rest of their lives dependent on income support.* (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe)

In the above account, the idea that people with a disability in receipt of the Invalid Pension have been “cast adrift” (Line three in Commonwealth of Australia, 1989) by broader socio-economic changes denotes the social relations of power and ideology in the images generated from the discourse. In reading another frame whereby reliance on disability income support is a pejorative notion, as seen in the following extract: “[reliance equates with being consigned to a] *welfare scrap heap*” (Commonwealth of Australia, House of Representatives, September 4, 1991c, p. 618, Bradford, Opposition Liberal Party) an assumption is generated that disability pensioners are purposeless, directionless and idle. Thus, even with an emphasis on the capacities of people with a disability, the construction maintains the negative associations with laziness and idleness. The images presented in the phrases “cast adrift” (Line three in Commonwealth of Australia, 1989 excerpt) and “welfare scrap heap” reinforces the welfare dependency notion by placing the problem of dependency solely with people with a disability (Gramsci, 1977). These illustrations demonstrate the way orders of discourse and rhetoric were used in policy debate to frame a new policy direction and justify a moralizing discourse. This framing reflects the emergence and constitution of the moralizing discourse about welfare dependency relative to people with disabilities reliant on disability income support.

The Hawke-Keating Governments used frames of moralizing discourse as found in the following terms, “*genuine compassion*”, “*financial incentive*”, and the “*concern for the less fortunate in the community*”. These discursive frames were positioned dialectically alongside the phrases, “*unemployment is a tragedy*”, “*the tragedy of coming out of a recession*”, “*we are ensuring that will not happen again*”, and “*the long term unemployed will be expected to accept jobs*” to appeal to the general public and legitimise the Government’s moral concern, while simultaneously marginalising counter discourses. Where the Invalid Pension was historically perceived by the Government as benevolent and paternalistic, the Disability Support Pension and associated labour market programs were regarded as the instruments for overcoming inequalities in the labour market and paternalism. Yet, the moralizing

discourse founds in these frames such as “ensuring that [dependency] will not happen again”, became the dominant ideology in Epoch Three.

The moralizing discourse drew distinctions between the so-called able-bodied poor and disabled unemployed people. The framing of the argument in terms of individual tragedy, people less fortunate, and those most in need requiring genuine compassion told the reader that people with a disability were still objects of pity. Even with the changes under the Hawke-Keating Governments, the paternalistic assumptions underpinning the disability income support system, tended to relegate people with a disability in terms of the deserving poor. The moralizing discourse associated with the deserving poor rhetoric and passive recipients being “encouraged” to find work manifests a different interpretation of conservative paternalism in Epoch Three. This different translation of conservative paternalism during Epoch Three relates to the way the moralizing discourse functioned to shift notions of disability income support as an entitlement to reciprocal obligation and active citizenship. The moralizing discourse functions to problematise the belief that *receiving* disability income support encourages welfare dependency. The discursive frame generates an assumption that there exists a culture of dependency among disability pensioners in which the nature and structure of the disability income support system perpetuates idleness (Grover & Piggott, 2007). Hence, people with a disability receiving the Disability Support Pension were paternalistically constructed and promoted as idle, lazy and dependent. This moralizing discourse used to prevent dependency of the disabled habitual malingerer reflects the oppression of people with a disability in receipt of disability income support, given the myths and images generated by the punitive policy rhetoric.

The ideology and structure of the moralizing discourse is demonstrated in the active income support policy assumption which presumed that with no incentive, people with a disability would be “habitual malingerers” who languished on the Disability Support Pension (Commonwealth of Australia, Senate, June 4, 1991d, p. 4740, Senator Graham Richardson, then Minister for Social Security, Hawke Labor Government; Commonwealth of Australia, Senate, December 12, 1991e, p. 4748, Bell). The next extract communicates the habitual malingerers assumption that requires Government intervention:

*This new payment will be associated with specific opportunities which should considerably advance the situation of people with disabilities and give them the chance, increasingly, to get ... the training or the rehabilitation that they need to participate more fully within the community.* (Commonwealth Australia, House of Representatives, June 4, 1991b, p. 2823, Howe)

The subaltern voices of people with a disability reliant on disability income support and counter discourses were marginalised through the moralizing discourse frames. For the Opposition Democrats and peak advocacy bodies (such as Australian Council of Social Service (1991, [ACOSS]) and the Brotherhood of St Laurence, 1980, 2005a, 2005b, 2005c), the active policy approach did nothing to alleviate poverty for welfare recipients. Rather, the

active policy approach contained the presumption that it was individual deficits that contributed to poverty and unemployment. Countering the Hawke-Keating Governments discourses and practices, Bell's discursive frames in parliamentary speeches interacted with and was consistent across oppositional voices:

*The ... active employment strategy is based on some false and ... arrogant assumptions ... [and] assumes that a personal lack of effort rather than a lack of jobs is the reason for a person being unemployed [or on the Disability Support Pension].* (Commonwealth of Australia, Senate, June 4, 1991c, p. 4280, RB1, Robert Bell, TAS, Australian Democrats)

Here, the underpinning assumptions of individual dysfunctions contributing to poverty led to a belief that unemployment is caused by individual behaviour. The discursive frames revealed that the policy stance was punitive and paternalistic (reflecting the interaction between Commonwealth authority and conservative paternalism) as it assumed an individual with a disability does not have any worthwhile skills for employment.

### **Conservative paternalism and disablist language: Reifying dysfunctions**

In direct contrast to opposing views, some parliamentarians generated able-bodied and disabled distinctions by using disablist language that reified dysfunctions and deficits. Conservative paternalism manifested differently in Epoch Three through disablist language which reified individual, medical and charity models of disability. Parliamentary speeches during Epoch Three emphasised disablist language. Indeed, the values and beliefs of the Liberal Opposition interacted with the Hawke-Keating Governments policy discourse. The discursive formations reinforcing disabling language were demonstrated in discourses such as "[the new pension measures reflected] *policy paralysis*" (Commonwealth of Australia, Senate, June 4, 1991f, p. 4267, Alston, Opposition Liberal Party). Senator Alston (1991f) made the assumption that people with a disability in receipt of benefits were shirking their responsibility to look for work. He contended that the Hawke Government policy in effect was paradoxical: "[the policy] *promotes a disastrous cycle of welfare dependency* [due to perceived welfare] *laxity*" (Commonwealth of Australia, Senate, June 4, 1991f, p. 4267, Alston).

Similarly, in countering the call for tighter targeting and greater efficiency gains (Commonwealth of Australia, Senate, June 4, 1991f, p. 4267, Alston) by the Opposition Liberal Party, the Hawke-Keating Governments in effect reified the dysfunctions discourse as shown in the phrases: "*the lame and the sick*", "*depriving the seriously disabled*", "*burden of care [on partners]*", "*we want to be sure they are looked after*", "*some have the great physical burden of lifting the incapacitated*", "*suffering all those burdens*" and "[partners] *are expected ... obliged ... to be watchful, attentive, alert, and always at the ready to help*" (Commonwealth of Australia, 1991a, 1991b, 1991c, 1991d). This use of paternalistic and disablist language in official parliamentary discourses conceptualised people with a disability as a burden on

families, the community and wider society. Thus, disability pensioners' were paternalistically constructed as dependent on disability income support (Oliver, 2009).

In Epoch three, conservative paternalism is closely linked to the criterion workforce capacity and individual-functional models of disability. The construction of disability in terms of a dysfunction, together with paternalistic assumptions (un/deserving poor) in dominant discourses becomes part of the disablement process. Reliance on disability income support and having to prove disability and workforce capacity perpetuated the individual-functional theories. These assumptions become reflected in other institutionalised practices (labour market programs) and dominant legal discourses (Disability Support Pension legislation) which gave rise to the legitimated reification of disability as an individual pathology, problem and/or dysfunction (Gibilisco, 2003; Oliver, 2009).

An excerpt captures the paternalistic concern for people with a disability and the connection to labour market programs: *"as a government we are doing the right thing; we are making sure that people are not exploited in any way. We are making sure that they do not have to worry"* (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe). In this excerpt, the paternalistic concern for preventing exploitation and acting in the best interest of people with a disability reliant on disability income support is offset by the more coercive aspects of strengthening workforce capacity. The Government by assuming control of labour market initiatives as a means of preventing welfare dependency generated disablist distinctions among disability pensioners and the presumed able-bodied general public. The disability as dysfunction discourse particularly in relation to reliance on disability income support reified disablist discourse by promoting connotations of disability as a dysfunction. Here, the rhetoric led to the victim blaming of people with a disability in receipt of disability benefits (Roulstone, 2000). The policy approach adopted by the Government in Epoch Three ignored the social exclusion of people with a disability from the labour market and situated the blame in terms of individual deficits and dysfunctions, thereby labeling people with a disability reliant on disability income support (Roulstone, 2000). The danger in idealising the labour market connection is the tendency for the policy response to reinforce the victim blaming of people with a disability in receipt of disability income support.

The discourses by the Hawke-Keating Governments and Opposition Liberal Party provide insight into the ideology in which the disablist distinctions generated through the speech were a central feature of the disablement process (Grover & Piggott, 2007).

### **"New medicalised criteria" and the punishment of disability pensioners**

The Disability Support Pension was perceived by the Hawke-Keating Governments as a "liberalising change", due to the implementation of "new medicalised criteria" (Cited in Howe & Burbidge, 2005). The emphasis on eligibility requirements based on new medicalised

criteria ignored any calls for including socio-economic factors. The hegemonic struggle in policy debates was played out in counter discourses (ACTCOSS, 1991c; Cass et al., 1988; VCOSS, 1988) who suggested that basing decisions solely on medical impairment ignored other factors impacting on people with a disability (such as work history and labour market conditions). This struggle for prominence in policy debates is revealed in the next extract: *“the Government’s new approach is a denial of any place for the impact of non-medical factors in assessing whether or not a person has a continuing inability to work”* (ACTCOSS, 1991c, p. 14). However, the Hawke-Keating Governments legislative changes to the eligibility criteria placed considerable emphasis on medical indicators and individual deficits. Thus, the implementation of new medicalised criteria restricted payment to only those persons deemed to be genuinely incapacitated to work, clearly linking medical deficits and work (ACTCOSS, 1991c, p. 14). Goggin and Newell (2005) identified that the power of conservative paternalism interacting with Commonwealth authority is reinforced through the classification of disability as part of the eligibility requirements for the Invalid Pension. Consequently, the individual-functional and medical models of disability were further perpetuated in disability income support policy. This, in turn, reinforced the disabling nature of the disability income support system.

In generating a distinction between the Invalid Pension and the Disability Support Pension, the Hawke-Keating Governments added emphasis to the medical basis of eligibility. They perceived that the Disability Support Pension was designed to provide an adequate standard of living for the most deserving, as evident in this extract:

*The award of a disability support pension is not about doing anybody a favour; it is about giving those with a severe medical impairment an opportunity for a decent standard of living ... it is about a civilised society providing for some of its more unfortunate citizens a decent level of income support.* (Commonwealth of Australia, Senate, November 26, 1991i, p. 3310, Graham Richardson, then Minister for Social Security, Hawke Labor Government)

This claim is also captured in the following excerpt:

*When the disability support changes were put through this Parliament in very recent times ... we moved to a medical test, a 20 per cent impairment level. That was the test that we set and that is the level a person now has to pass. If a person cannot pass it, he or she will not get a pension.* (Commonwealth of Australia, Senate, November 26, 1991i, p. 3310, Richardson, Hawke Labor Government)

The extract revealed the interplay between Commonwealth authority and conservative paternalism contained in the new medicalised criteria discourse. These illustrations also reveal the assumption by the Hawke-Keating Governments that the Disability Support Pension functioned as an efficient mechanism for easing the transition from the disability pension to the labour market and allowed for sporadic employment. In effect, the so-called liberalising change reinforced the link between capitalism, productivity and disability as a basis for participation, and generated notions of disability as a burden on society. Thus,

these changes to the Disability Support Pension and the discursive formations further tightened the connection between ableness, individual dysfunctions, citizenship and productivity. Consequently, disability becomes an encumbrance to the principles of profit-making and economic freedom (through the necessity of workplace adjustments and welfare relief) (Gibilisco, 2003). In this epoch, disability became classified in terms of a burden, which should be individually managed. The assumption was that any income support provision provided by the Commonwealth was onerous to non-disabled people. These assumptions of disability as a burden led to greater marginalisation of people with a disability in receipt of disability income support (Gibilisco, 2005). The hegemony of new medicalised criteria was reinforced through bureaucratic centralism (legislative framework underpinning the Disability Support Pension).

### **Counter discourse to the enabling disability policy**

During Epoch Three, while a hegemonic bloc was formed, subaltern voices were engaged in the struggle for countering the disabling effects of the disability income support policy. The data revealed the opposing discourses (such as ACTCOSS, 1991a) to the Government policy stance, which highlighted the finding that the changes were indeed harsh and punitive. While attempting to diminish labour market barriers, the eligibility requirements for the Disability Support Pension under the Keating Government were viewed as harsh by advocacy groups and some policy commentators (such as ACTCOSS, 1991a). For example, one counter discourse suggested: *"in addition to scoring 20 per cent or more on the impairment tables, a person's impairment must 'of itself be sufficient' to stop the person from working"* (ACTCOSS, 1991a, p. 10). The counter discourse by advocacy groups revealed a central concern, demonstrated in this example: *"the criteria also specifically excludes any consideration of the availability of work, education or training near the person's home, unless the person is over 55 years"* (ACTCOSS, 1991a, p. 10). Thus, people with a disability must travel or relocate to where employment is available. Withdrawal of income support (*"for up to six weeks"*) can result from people with a disability not participating in a rehabilitation program or labour market initiative (ACTCOSS, 1991a, p. 10).

The unintended consequences of the reciprocal obligation discourse and lack of reciprocity in the so-called contractual arrangement is revealed in the next counter discourse:

*What do we do in this climate? We introduce contractual obligations upon the unemployed [and people with a disability] without a corresponding commitment on the part of government ... to create more employment, provide adequate resources for the strategy and develop improved opportunities for paid work experience in labour market programs.* (Commonwealth of Australia, Senate, June 4, 1991a, p. 4272, Lees, SA, Australian Democrats)

Here, the extract reveals that although established as an enabling policy, according to the then Senator Lees (SA, Australian Democrats), the policy was one of compliance and compulsion. The inference generated was that there was no reciprocity underpinning the

active support policy. This contention is found in a later section of the parliamentary speech, whereby a counter-hegemonic discourse in reference to the active income support policy rhetoric is presented: “[the disability income support policy change is an] *all sticks and no carrots approach*” (Commonwealth of Australia, Senate, June 4, 1991a, p. 4272, Lees, SA, Australian Democrats). Here, conservative paternalism was evident, which alluded to the punitive nature of the policy response. These extracts reveal the way the policy did little to ensure a sense of security in the provision for disability income support.

Counter-hegemonic viewpoints challenged the conservative paternalism and Commonwealth authority discourses, particularly concerning the enabled active citizen discourse, for not taking into account the broader social conditions of the labour market. A parliamentary speech indicated that the paternalistic and coercive role of Government was taken to the extreme when the Keating Government ignored the reality of the Australian political economy. The following extract demonstrates the blurred conceptual understanding of the enabled active citizen discourse within the context of high unemployment: “*surely it is clear that it is the lack of jobs that is causing unemployment, not a shortage of labour market programs and certainly not the attitudes of the unemployed people themselves*” (Commonwealth of Australia, Senate, June 4, 1991a, p. 4272, Lees, SA, Australian Democrats). From this excerpt, the compulsion notion implied individual deficits. The Hansard revealed parliamentarians’ conceptual blurring of unemployed people and people with a disability, as the policy changes were underpinned by the enabled active citizen notion coupled with the perceived need for incentives. However, the data indicated that the policy was forcing people with a disability to look for work that is not available (Commonwealth of Australia, Senate, June 4, 1991b, p. 4291, Sid Spindler, VIC, Australian Democrats). Disability social theorists, Grover and Piggott (2007) maintain that exclusion from the labour market forms part of the disablement process of people with a disability in receipt of disability income support. The disabling nature of the disability income support provision did little to enhance the participation of people with a disability.

Another parliamentary speech revealed the alliance forming aim of the Government discourse in order to secure legitimacy for the policy change: “[there is a tendency for the Government to] *pander ... to the views of those in the community who believe that we do not need to worry about the unemployed [or disability pensioners] because it is all their fault*” (Commonwealth of Australia, Senate, June 4, 1991a, p. 4272, Lees, SA, Australian Democrats). In this account, the discursive formation suggests the Government is yielding to public opinion. Yet, in effect the Government is producing the assumption that the Government should discontinue disability payments and not provide income support to people with a disability. Such a notion of “pandering” was not new. In 1987, Tomlinson pointed out to the Hawke Government:

*Welfare clients are bitterly offended by such references [Government suggestion of welfare dependency and welfare fraud] and that now is the time to*



*accept your own party's welfare policies to confront reactionary views held in the community about welfare clients, and to attempt to move Australia and Australians towards a socially just society.* (Cited in Tomlinson, 1987a, p. 1)

These extracts revealed the way discursive formations are used by the Government to garner support for their policy position. The alternative viewpoints provided a critique of the Government's (Epoch Three) policy approach.

Other counter discourses exemplified the implications of the tighter eligibility conditions for people with a disability receiving benefits: *"approximately one in five of people meeting the current conditions for Invalid Pension may not qualify for the new Disability Support Pension. In aggregate, these exclusions may be productive of very harsh policy outcomes"* (Cited in Carney, 1991, p. 230). This extract was chosen as it best reflects the common position and arguments framed by opposing voices. Typically, these accounts revealed that the policy principles centred on economic ideals rather than social justice aims. They also indicated the overreliance on deterministic measures of disability. In another extract, the consequence of economic policy ideals is made clear:

*In the interests of certainty (and cost-cutting), the Government opted for precise determinative impairment tables and the exclusion of non-medical factors, however ... [the] Government legislation ... has elected to pursue the goals of: objective precision (full-time award work), simplicity and parsimony (exclusion of non-medical factors), and a traditional ... entry gate.* (Cited in Carney, 1991, p. 232)

Here, the counter discourse demonstrates the way classification of disability within income support policy, based on the individual deficit model was a component in the disablement process. An excerpt from Russell (2001a) revealed that these policy responses perpetuated the inferior status of people with a disability in receipt of disability income support: *"[the assumptions] have equated disability with physiological, anatomical, or mental 'defects' and hegemonically held these conditions responsible for the disabled person's lack of full participation in the economic life of our society"* (p. 92). In these above counter discourses, social justice and citizenship were constructed as paramount when measured against economic ideals, given the propensity for economic discourse to have negative consequences for people with a disability in receipt of disability income support.

Another counter discourse to the enabling policy is found in the discursive formation: *"that policymakers may already have had a closed mind on the subject (or that undue weight was given to effecting cost-savings through a narrowing of eligibility for long-term income support)"* (Cited in Carney, 1991, p. 239). Here, the discursive formation functions as counter-ideology to the Hawke-Keating Governments rigid policy stance and the harshness of the income support policy position. The counter-ideology reveals the consequence of the policy shift of the Hawke-Keating Governments, which centred on regimentation effects of the active income support approach and the implications of reciprocal obligations. This

disabling tendency and regimentation effects is also found in the next excerpt: “*new welfare can all too easily become a repressive ... vehicle for promoting social conformity*” (Carney, 1991, p. 243). ACTCOSS (1991b) made similar counter-ideologies about the excessive targeting of the most vulnerable members of society, including, people with a disability. Overall, the excerpts communicate the bureaucratic centralism of the Government and the way the disability income support system transforms into a policing organism (Gramsci, 1977, 1996). These illustrations also reveal that the discursive formations found in speeches and the stricter assessment criteria (including the tighter directing of people with a disability) reinterprets Commonwealth authority and reinforces conservative paternalism discourse as oppressive. Even where counter discourses were used to create a discursive space for opposition to the Hawke-Keating Governments policy agenda, bureaucratic centralism and the new legislation perpetuated the hegemonic dominance of the Australian targeted disability income support system.

For disability social theorists (as in, Gibilisco, 2005; Russell, 2001a), increased targeting of disability income support perpetuates the marginalisation of people with a disability in receipt of benefits. Counter discourses such as Carney (1991) and Gibilisco (2005) called for governments to increase expenditure on disability income support, rather than progress cost-cutting agendas. The pulling back on welfare expenditure and compelling people with a disability reliant on disability income support failed to account for the exclusion of people with a disability from the labour market because of the nature of the impairment. Hence, ignoring these impacts in disability income support policy leads to increased stigmatisation of people with a disability in receipt of Disability Support Pensions.

### **iii. Ideology of disablism and disablist discourse**

In Epoch Three, disablism emanated from the disabling process of changing medicalised criteria which were reinforced in disability income support eligibility. The rhetoric of social justice underpinning disability income support policy speeches in parliamentary discussions became the process for entrenching the ideology of disablism. The social justice discourse, even when at odds with economic policy ideals, functioned to garner wider support for the policy. Three sub-themes underpinned the ideology of disablism, which included:

- language of social justice as a means to soften the blow;
- the active society rhetoric as disabling; and
- the burden of non-productive disabled citizens: A most disabling practice.

#### **Language of social justice as a means to soften the blow**

Perhaps the ruse by Howe and the Hawke-Keating Governments to use the social justice discourse was an attempt to soften the blow of the increased Commonwealth authority, conservative paternalism and economic fundamentalism in attacking the most vulnerable

welfare recipients, particularly people with a disability. In other words, the data indicated that the vision for a just and fair society upheld as the ideal, was in effect a whitewash. As discussed, the discourse of the Hawke-Keating Governments revealed that social justice was used as an empty signifier (Fairclough, 2003) to secure economic ideals as the dominant discourse. In contrast, advocacy groups such as ACTCOSS (1991b), used discursive frames such as the “[Hawke-Keating Governments] *gloating*” over its success in implementing such a harsh policy change to disability income support (ACTCOSS, 1991b, p. 3). The counter discourse by advocacy groups such as ACTCOSS (1991b) highlighted that the regime change in effect led to tighter restrictions as seen in this frame: “*drastically cut[ting] back income support*” (Cited in ACTCOSS, 1991b, p. 3).

The dominant frame of social justice applied under the Hawke-Keating Governments, while touted as a just policy approach, in effect contradicted the social aspect by linking justice and participation aims to economic hegemonic principles for achieving equity (Gramsci, 1977). The counter discourses pinpoint the social relations of power and ideology underpinning the discourses of the government policy:

*Such moves could be viewed as a means of legitimating unreasonable denial of benefits to those who need them. This is particularly significant for people with severe hidden impairments or medically contested conditions who might be deemed too sick to employ, but not eligible for disability benefits. (Cited in Roulstone, 2000, p. 435)*

As the above counter discourse suggests, people with a disability reliant on disability income support faced undue hardship and the legitimization of withdrawing benefits. The discourse of social justice used in conjunction with the Hawke-Keating Governments changes to disability income support were used by the Governments as a rhetorical device to soften the more harsher aspects of the change. This discursive formation was also used to present the Hawke-Keating Governments in a humanitarian light.

The ideological soundness of the disability income support policy approach is questioned by peak bodies such as ACTCOSS (1991b):

*[The Hawke-Keating Governments] abolished the Invalid Pension introduced in 1908 [through the Social Security (Disability & Sickness Support) Amendment Bill 1991 and] removed the concept of people who are unable to earn income themselves [as] being able to rely on a subsistence living from the Commonwealth. (p. 3)*

Here, the article captured the erosion of the assumption that people with a disability reliant on welfare was a positive conception. As the counter discourses demonstrated, the notion of the participation of people with a disability in all aspects of the community becomes narrowly defined, as seen in this phrase, “*participation in the labour force*” (Office of Senator Meg Lees, SA, Australian Democrats, cited in ACTCOSS, 1991c, p. 15). The counter viewpoint highlights ideological differences between the Government and alternative discourses during

an epoch marked by a sharp downturn in the economy. This is shown in the use of phrases such as “*limited [policy] vision*”, “*jump through hoops*”, and “*highly questionable [policy approach]*” (Office of Senator Meg Lees SA, Australian Democrats, cited in ACTCOSS, 1991c, pp. 12, 15). These discursive frames through the use of imagery and content, are indicative of the different ideology communicated in counter discourses by peak bodies, policy commentators and social democrats.

### The active society rhetoric as disabling

The active society rhetoric functioned to entrench disablism. An extract demonstrates the implications of the active society rhetoric: “[the] *combination of the Fraser government’s cargo cultism ... and the naive neoclassicism that has prevailed under Hawke has taken us to the point where more rather than less government intervention is an urgent necessity*” (Cited in Dowse, 1991, p. 8). Figure 10, entitled “Keating riding on the back of the unemployed”, portrays the broader economic conditions in which the Disability Support Pension came into effect and the underpinning ideology associated with the Government pulling back on intervention.



**Figure 10:** ‘Paul Keating receiving a medal for 1.2% inflation while riding on the back of the unemployed’ [picture]. Cartoon created by Pryor, Geoff. Reproduced courtesy of National Library of Australia <http://www.nla.gov.au/pict/pic><sup>33</sup>

The active society rhetoric as disabling discourse is found in the change from the Invalid Pension to the Disability Support Pension. The Disability Support Pension contained elements of compulsion and breaching, that is: the deferment of payments for non-compliance. For example, penalty periods were introduced to ensure compliance, with

<sup>33</sup> Published in 1992.

cancellation occurring in the event of non-compliance. In the active support policy approach non-compliance is posited as an individual cause as shown in the frame: *“if the person has not remedied the failure”* (ACTCOSS, 1991c, pp. 12-13). Another extract reveals the consequences of attaining employment: *“if a DSP recipient obtains paid work of at least 30 hours per week, the pension can be suspended ... for up to two years”* (ACTCOSS, 1991c, p. 13). Here, the threat of losing the Disability Support Pension operates as a barrier to obtaining work. These discursive frames point to the way the enabled active citizen and active society rhetoric is disabling in nature.

The policy of cost-cutting is evident whereby savings are expected to be generated by transitioning people with a disability from the Disability Support Pension across to a different payment (JSA/NEWSTART<sup>34</sup>) (ACTCOSS, 1991c, p. 14) as depicted in the frame, “streaming”. Counter discourses communicated the undue hardship that would be experienced by people with disabilities being streamed across payments. For advocacy groups such as ACTCOSS (1991c) people with disabilities would not be better off. The claim is identified in the following extract: *“[people with disabilities] would be forced to navigate the same obstacles as the non-disabled unemployed and ... compete in the same restricted labour market”* (ACTCOSS, 1991c, p. 14). This discursive frame of undue hardship reflects Roulstone’s (2000) contention that some people with a disability may fall through the gaps and end up receiving no benefits.

Counter arguments by ACTCOSS (1991c) highlighted the disablist consequence of the policy change concerning income support for people with a disability. The following excerpt demonstrated challenges to the Government’s rhetoric:

[The policy shift] *appears to be more of the same in the screwing down of the social security system and part of the Hawke Government’s continuing shift away from the concept of adequate and secure income support in recognition of the inability of the labour market to provide adequate income through employment. As with JSA/Newstart, this package is basically saying that the disabled ... owe the community something in return for their income support and that it is appropriate to use the threat of terminating their income to force them to meet Government requirements.* (Cited in ACTCOSS, 1991c, p. 15)

Here, the use of the phrase “screwing down of the social security system” (Lines one and two in the ACTCOSS, 1991c excerpt) draws attention to the implications of the ideology of disablism. Other phrases used included: *“draconian ... attack on welfare recipients”* and *“[against the ideals of a] compassionate society where the provision of a secure income was a guarantee of citizenship”* (Cited in ACTCOSS, 1991b, pp. 4-5). This use of language by the advocacy groups is an attempt to provide an alternative hegemony against the harshness of

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<sup>34</sup> JSA refers to the Job Search Allowance. Carney (1991, p. 236) regarded the assessment process at the entry-stage and shifting people with a disability across to Job Search Allowance or Newstart to be a product of the “active stream” of the Disability Support Pension.

the disability income support policies. The counter discourses offered by advocacy groups particularly in their use of terms such as “draconian” for disability income support and the argument for “adequate and secure income support” give insight into the discursive formations of counter discourses. The advocacy groups use rhetorical devices to invoke images of traditional disability income support policy as an exclusionary and inhumane measure. This point becomes clearer when contrasting advocacy groups counter discourses of universal provision against Howe’s speeches (Hansard) where the rights of people with a disability are established as conditional, even when concepts of social justice is used.

### **The burden of non-productive disabled citizens: A most disabling practice**

In effect, ableness became the precondition for productive citizenship, rather than social citizenship. The ideology of being a productive citizen underpinning the changes to disability income support policy in Epoch Three assumed people with a disability reliant on the Disability Support Pension were a burden on the welfare system and hence, on society (Gibilisco, 2003, 2005). Further, the ideology of disablism is patent in the assumption that people in receipt of the Disability Support Pension have not contributed to society. Counter discourses cautioned against equating disability with non-production, given the tendency for assumptions that people with a disability reliant on disability income support would be perceived as a burden and a problem to be solved. This is evident in this phrase: “*people with disabilities are argued to offer such a system little, so receive minimal amounts in return*” (Cited in Gibilisco, 2005, p. 141). In this account, tying the disability concept to productive capacity, labour market participation and burden rhetoric, reflects the disabling process of disability income support policy.

The dominant ideology perpetuated in Epoch Four suggested that citizenship is based on being productive, and social participation can be achieved only through workforce participation. In instituting hegemonic principles of productivity and workforce participation, the Hawke-Keating Governments presented as a decisive leader and held the expectation that people with a disability reliant of disability income support would participate. The following excerpt depicts the Government’s values and expectations: “*these people [disability pensioners] have a right to make choices to enable them to develop fully their potential and this Government is committed to providing the opportunities for them to do so*” (Commonwealth of Australia, House of Representatives, December 30, 1989, p. 3264, Howe; also found Commonwealth of Australia, House of Representatives, December 10, 1987a, p. 3305, Howe; Commonwealth of Australia, 2002a). In these accounts, the enabled active citizen discourse denotes productive citizenship and is established as a coherent approach to the presumed policy problem of languishing on disability income support.

### **Epoch Three Summary**

Commonwealth authority was reflected in the constraints applied to disability income support expenditure and the emphasis on productive capacity creating an enabled active citizen theme. The sub-theme of an active citizen occurring in Epoch Three was distinct from earlier epochs in that policy changes moved from a plight of the invalid construction to ideas of workforce incapacity and proving capacity. Constructing policy language in terms of socially just outcomes for people with a disability was in effect a smokescreen to soften the more controlling aspects of changes to disability income support. This was evidenced whereby the concept of social justice was used as an empty signifier to garner support for disability income support policy changes. The theme of conservative paternalism could be seen in the moralizing discourse used in disability income support policy to prevent the presumed idleness of people with a disability in receipt of the disability pension. The sub-theme of new medicalised criteria under the Disability Support Pension (1991), was designed to redress the permanently incapacitated for work requirement. The connection between invalidity, productivity and individual-dysfunctional, medical and charity theories was a direct consequence of disablist policies, rather than the assumed passive income support system (Gramsci, 1977). Reliance on income support was constructed as a negative feature. This feature was demonstrated in the pejorative association attached to the concept: reliance on disability income support. The notion of reliance generated a link to suggestions of idleness and dependency. Yet, the policy change failed to account for the historical exclusion of people with disabilities from the labour market given the old criterion of permanently incapacitated for work.

The manifestations of Commonwealth authority and conservative paternalism functioned to generate and perpetuate the ideology of disablism. The ideology of disablism was perpetuated in the shift from a passive disability income support system to an active disability income support system. The promotion of an active support system entrenched disablism on the basis of able-bodied and disabled distinctions, including greater connections to the labour market and productivity.

The next section examines Epoch Four.

### ***5.3 Epoch Four - 1996-2007: The 'Disabled Bludger': A Shift From Plight of the Invalid & Genuinely Unemployed***

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#### **Introduction**

In a similar vein to previous governments, the Howard Government (Liberal-National Coalition) embraced the idea of ending reliance on welfare and introduced even more stringent welfare changes. In Epoch Four, the notion of disability income support was changed from an entitlement to a notion of welfare dependency through the language of genuinely disabled. In Epoch Four, Commonwealth authority, and conservative paternalism discourse contained premises that purported the need to address the so-called "inadequacies and deficits of the welfare system". Underpinning this epoch were austere policies based on a neo-liberal and conservative economic agenda, which emphasised economic imperatives over social objectives and full-employment (Bill, Cowling, Mitchell & Quirk, 2004). Commonwealth authority and conservative paternalism became even more regulatory and paternalistic through the instigation of mutual obligation requirements, and operated with economic fundamentalism in an effort to curtail public expenditure and increase the targeting of the disability income support system. Yet, the targeting of disability income support policy was inherently underpinned by disablist ideology, thus further entrenching the disablist ideology pervading the previous three epochs.

The recommendations outlined in the "Challenges of Welfare Dependency in the 21<sup>st</sup> Century" policy document (Newman, 2000) and the McClure Report (2000, Reference Group on Welfare Reform, 2000) provided the justification and impetus for the Howard Government to extend the mutual obligation criteria to disability income support, and to tighten the definition of disability (Reference Group on Welfare Reform, 2000; Rowse, 2002). In this epoch, the policy emphasis centred on the principles of "genuinely disabled", self-reliance, and targeting the most needy of society. The Howard Government policy trajectory targeting the genuinely disabled is reminiscent of the Fraser Government focus on genuinely looking for work. This aspect of genuinely needy underpinning the Howard Government policy similarly echoed the Menzies, Gorton and McMahon Liberal Government arguments for greater targeting and upholding incentives to work identified in the other three epochs (see Kewley, 1980, p.63). While the blend of Commonwealth authority and conservative paternalism in part resembles some of the themes of the previous governments in Epoch Two and Epoch Three, the changes to disability income support policy in Epoch Four were far more complex. This is particularly so given the construction of the genuinely disabled concept and the influence on community attitudes concerning the obligations attached to income support provision. The discourses revealed that the new measures targeting disability income support were, in effect, harsh and punitive.



**i. Commonwealth authority: Power of the State to intervene and control of people with a disability**

During Epoch Four, Commonwealth authority was reflected in the central policy platform of welfare changes targeting disability income support coupled with the rhetoric of welfare dependency and regulating the behaviour of people with a disability reliant on disability income support. The four main sub-themes underpinning Commonwealth authority in Epoch Four are:

- broader political context: Targeting disability income support;
- Commonwealth authority and the regulated disabled citizen: “Breaking the shackles of welfare dependency”. The hidden unemployed theme;
- tighter eligibility requirements: “Partial capacity to work”. Incentive by punishment policy” and the “mean-spirited crackdown”; and
- compliance and regulation: Adding administrative complexity to disability income support.

**Broader political context: Targeting disability income support**

The changes promoted by the Howard Government reflected a significant ideological shift whereby there was an even greater concern for welfare dependency and increased costs associated with disability income support. A new expression of Commonwealth authority evolved in relation to the introduction of regulatory measures framed by the Government in terms of “welfare reforms”, to manage the presumed problem of welfare dependency. The data indicated that the change in the role of Government in Epoch Four is different from earlier epochs whereby the governments in these earlier epochs continued to assume a social protectionist framework for disability income support policy, even with the presence of economic fundamentalist principles in the latter part of Epoch Two and across Epoch Three.

In Epoch Four, Commonwealth authority discourse operating with economic fundamentalism emphasised a minimalist approach to Commonwealth intervention in the provision of disability income support. Thus, the Government sought to reframe the nature of the relationship to one based on individual and contractual obligations (generally one-sided on the part of the Government) (Gramsci, 1977, 1996). The grounds for such a claim hence become centred on affordability and necessity. In a similar vein it could be argued that it is the erosion of Commonwealth responsibility and the rise in the “active citizen” notion which characterises the neo-liberal turn. Yet, in Epoch Three a historic bloc signified the change through enabling policies with the language of enabled active citizen using social justice language, whereas in Epoch Four, the Commonwealth Government formed alliances with economic fundamentalists’ to manifest Commonwealth authority as a intellectual/moral bloc (Gramsci, 1977, 1996). In this sense, the hegemonic constructions defining Epoch Four gave rise to a more intelligible and logical form than previous epochs. The consequence of such

an intellectual/moral bloc was the erosion of the social protectionist framework surrounding the disability income support system.

Taking the notion of an active support system even further, the Government believed that the income support system continued to operate in the traditional passive model of welfare relief and failed to address the perceived issue of dependency on the income support system (Bessant, 2002; Newman, 2000). This standpoint is illustrated in the discourse by the then Minister for Family and Community Services, Senator Jocelyn Newman (2000):

*The social security system has ... contributed to the growth in welfare dependency, by placing too little emphasis on the second and third of these objectives [targeting genuinely needy and promoting greater self-reliance]. While it redresses short-term poverty by meeting immediate needs, it does not have a sustained focus on helping people move beyond reliance on income support to self-sufficiency. Some parts of the system still create work ... disincentives.... In short, it still does too little to prevent and discourage welfare dependency. (pp. 6-7)*

In this account, the then Senator Newman (2000) used the discursive formations of “reliance on income support” and “welfare dependency” to further shift the meaning of income support entitlement. An ideological link is formed between the idea of income support and the perceived problem of welfare dependency. This rhetorical device is also found in other policy documents and parliamentary speeches of the Howard Government (for example J. Howard, 1999a, 1999b, 2000). According to the then Treasurer Peter Costello, “*the current system was set up at a time when full-time work was the norm for men but many groups, such as ... people with disabilities, were not expected to work. Today, opportunities and expectations are different*” (Cited in *Sydney Morning Herald*, 2004). These excerpts captured the shifting connotation of disability income support whereby it changed from an entitlement assumption to an obligation premise. The rhetoric underpinning the welfare changes policy portrayed the notion of entitlement as an outmoded norm, shown in the use of the term today as a modern conception. During Epoch Four the notion of entitlement diverged from Epoch Three.

Alongside the rhetoric of welfare dependency, Commonwealth authority centred on the proposition that effective welfare changes resulted from the achievement of good income support policy outcomes, while simultaneously balancing broader global social and economic trends. The order of discourse in Newman’s (2000) policy paper and other parliamentary speeches is important here. In reading Newman’s (2000) policy paper alongside broader global shifts, Newman establishes legitimacy for Commonwealth authority and targeting disability income support through the discursive frame: “[the] *government’s disciplined approach to fiscal policy*” (p. 10). Newman strengthened the claim by asserting that the Howard Government welfare changes reflected a “*modern conservative approach*” (p. 6). In reframing the argument for welfare changes in policy speeches, the Government could establish Commonwealth authority and power through claims that the welfare changes

represented a modernist approach. The contrast from previous epochs is stark. Epoch Three represented the emergence and constitution of a new historic bloc (Commonwealth authority hegemonic alliance with neo-liberal principles), whereas in Epoch Four, economic fundamentalism found a new expression in the modern conceptualisation of the Howard Government fiscal policy imperatives targeting disability income support policy (Gramsci, 1977, 1996). This new manifestation of Commonwealth authority functioned to legitimise the targeting of disability income support.

The proposition advanced in the Newman (2000) policy document centred on the belief in strong economic policy: *“the maintenance of sound fiscal policy provides the underpinning for expansion in the Australian economy and is the basis for continued employment growth and economic security for all Australians. In short, good economic policy is good welfare policy”* (p. 10). In this statement, modern income support equated with economic considerations. Thus, the discursive formation suggests that a strong active income support system could be realized only by strengthening economic development, engaging in employment expansion and providing incentives to work. The last sentence captured the pre-eminence of economic ideals, which were at the heart of the Howard Government policy. The idea that good economic management was essential for a strong economy, derived from a balance between Government public policy and *laissez-faire* economics, as shown in this extract: *“[the aim is to] reconcile a market economy with a fair and decent society”* (Cited in J. Howard, 2006, p. 2). The prominence of economic policy was often at the expense of social goals. This denoted the blend of Commonwealth authority and economic fundamentalism underpinning the change agenda. This blend of Commonwealth authority reflected a modernised authoritarian discourse with an aggressive application of hegemonic neo-liberal principles.

In making the claims of modern and sound economic policy for income support, the Howard Government negated the suggestion that there were similarities between past and present policies. Even though both the Hawke-Keating Governments (Epoch Three) and the Howard Government (Epoch Four) claimed to use a modern integrated approach, subtle ideological differences were evident between each policy position. The difference lies in the way the Howard Government in Epoch Four used the hegemonic discourse of modern and good economic policy to refute criticism directed at the welfare changes, and also to legitimate the stringent accountability measures and cost efficiencies required for streamlining a perceived inefficient income support system (Commonwealth of Australia, House of Representatives, March 14, 2005a, p. 1; J. Howard, 1999a, 1999b, 2000; Newman, 2000; Reference Group on Welfare Reform, 2000). The effectiveness of the policy language is dependent upon the hegemonic principles underpinning institutional innovation in the reorganisation of social formations (disability income support system) (Gramsci, 1977). Such rhetorical devices are found in Hansard speeches whereby the Howard Government believed that, by tightening

the eligibility criteria for disability income support and implementing work requirements a more targeted and sustainable system benefitting all citizens could be generated (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 38, Andrews). Commonwealth authority was reframed to legitimate the targeting of disability income support (Roulstone, 2000).

Another example where the Government in Epoch Four sought to strengthen the regulatory framework of disability income support centred on the appropriation of certain policy principles traditionally associated with social democratic policy. During Epoch Four, policy speeches incorporated the language of “social democratic” society and “egalitarianism” to sell a blend of neo-liberal, modern conservatism coupled with Commonwealth authority (Norton, 2006-07, p. 21). The use of egalitarian language was evident in the following extract of a speech by then Prime Minister Howard: *“we’re a Party that does not believe in privilege or class. We are a Party that honours and respects tradition but also prides itself in sharing the great egalitarian tradition of the Australian people”* (Cited in J. Howard, 1999b). The egalitarianism principle applied in this statement was at odds with the targeted approach used to address welfare dependency through mutual obligation initiatives. The notion of egalitarianism suggested that democratic and equal participation were enjoyed by all citizens. However, as this analysis will demonstrate, for the Government in Epoch Four, the welfare changes were one-sided with contractual responsibilities being applied only to the targeted vulnerable groups, such as, people with a disability (Gramsci, 1977). Thus, in reality, the modernist conception discourse functioned to restrict access to disability income support payments as demonstrated in the next excerpt: *“such moves [may have operated] ... as a means of legitimating unreasonable denial of benefits to those who need them”* (Cited in Roulstone, 2000, p. 435). The outcome of such policy measures constituted the assumption that people in receipt of disability income support, needed some form of regulation and control. Aligning Commonwealth authority and economic fundamentalism (containing neo-liberal principles) with the egalitarianism discourse functioned to provide legitimacy for using policy measures that controlled people in receipt of income support, most particularly, people with a disability. In garnering legitimacy for transforming the disability income support system, the Howard Government used crisis tendencies. This discourse of crisis provided a discursive space for re-interpreting the crisis in the established economic order (Gramsci, 1977). This discursive space then allowed for changes that suggested the need for strong Commonwealth economic intervention.

A counter discourse, Caro (2005) challenged the moral basis of the tighter eligibility requirements and work requirements. The tighter targeting of disability income support policy solely targeted certain vulnerable groups in society (such as people with a disability and sole parents), while ignoring those groups at the other end of the spectrum (for example,

Government handouts to private schools and business). The following extract reveals the intellectual/moral hegemony of such targeted measures:

*If mutual obligation and ... [the welfare-to-work initiatives] are the new deal for what used to be called the deserving poor, why on earth do we not demand at least the same level of accountability from those who appear to consider themselves the deserving rich? (Cited in Caro, 2005, para. 18)*

In this excerpt, individual rights and choice were portrayed alongside social obligations to society. The counter discourse reveals that the mutual obligation scheme became the mechanism to promote social responsibility and economic growth through increased socio-economic participation (Reference Group on Welfare Reform, 2000, p. 32). Rights were constructed in terms of economic and civic obligations and were ascribed greater value in contrast to the social rights of citizenship and autonomy (Gramsci, 1977; Sherry, 2002; Snyder, 2003).

### **Commonwealth authority and the regulated disabled citizen: “Breaking the shackles of welfare dependency”**

Throughout Epoch Four, the Howard Government sought to reinforce its policy position. Commonwealth authority was redefined and reinterpreted through the regulated disabled citizen discourse. Parliamentary debates and media reports were replete with the repetitive use of particular phrases, such as welfare dependency (as a descriptor) and increasing capacity. For example, the following extract reveals the increased capacity discourse and emerging regulated disabled citizen discourses: *“too many income support payments are still focused on incapacity and barriers to work, rather than emphasising people’s capacities and potential”* (Cited in Newman, 2000, pp. 6-7). The significance of the framing of Commonwealth authority ideology during Epoch Four is patent. The metaphors used to portray people reliant on income support, promoted strong negative images of the individuals themselves and suggested the need for greater control and regulation. Senator Jocelyn Newman (2000) proposed that the Government adopt a “strong” policy stance by targeting genuine need and fostering self-sufficiency through incentives, as shown in the following discursive frame: “[strong standpoint in] *tackling ... [the] problem of welfare dependency*” (p. 7). The use of terms such as “strong” government and “tackling welfare dependency” in the policy document functions to legitimise Commonwealth authority and the regulated disabled citizen discourse.

The Government perceived that solely focusing on income support and labour market programmes (implemented by the Labor Government in Epoch Three), did nothing to prevent dependency, as demonstrated in the discourses of *“trap of welfare dependence”* and *“worklessness”* found in parliamentary speeches and policy reports (Commonwealth of Australia, 2000; Newman, 2000, p. 8, Tomlinson, 2007a, 2007b). The welfare changes were expected to improve the welfare system’s operations so as not to repeat the presumed

mistakes of the past governments. The data revealed that the Government viewed the labour market initiatives for disability income support adopted by the previous Labor Government (Epoch Three) to be a part of the problem of welfare dependency (Engels, 2006; Newman, 2000). Thus, under this strategy, the labour market programmes for people with a disability were scrapped and job network agencies privatised (Tomlinson, 2007a, 2007b). This regulated disabled citizen discourse perpetuated by the rhetoric of welfare dependency gave credence to the re-interpreted Commonwealth authority.

Further reinforcement of the regulated disabled citizen discourse is found in parliamentary speeches and media articles. Adopting the language of the Newman (2000) and the Reference Group on Welfare Reform (2000, p. 33) policy documents, the then Treasurer Costello (Cited in *Sydney Morning Herald*, 2004), the then Federal Employment and Workplace Relations Minister, Kevin Andrews and the then Minister for Human Services, Joe Hockey (2006) further argued for the increased participation of income benefit recipients in the labour market to prevent so-called welfare dependency. This is demonstrated in the phrase: “*break the shackles of welfare dependency*” (Cited in *Sydney Morning Herald*, 2004). Figure 11 entitled: “*welfare dependency*”, captured the history of Commonwealth intervention and the contradiction between Costello’s (Cited in *Sydney Morning Herald*, 2004) claim that “*our symbols are fraying*”, using the symbology of Australia’s traditions and history: from Commonwealth authority over convicts to modern interpretations of Commonwealth authority concerning income support provision.



**Figure 11:** Cartoon by Nicholson from "The Australian" newspaper: <http://www.nicholsoncartoons.com.au>

The above figure (Figure 11) depicted the welfare dependency rhetoric used in policy speeches, by encapsulating the assumption that, in reality, history continues to repeat itself through different interpretations and translations of Commonwealth authority in the regulation of the behaviour of particular groups. Here, the ideology of welfare dependency and associated symbology gave rise to the regulated disabled citizen discourse. The symbols of nationalism operate as a device to highlight the nationalist discursive formation and the extent to which national symbols, institutional practices and ideology become commonsense and taken for granted (Gramsci, 1977). In this case, the idea of a regulated disabled citizen is perceived in Government policy to be the only outcome of breaking the shackles of welfare dependency. In effect, the cartoon also portrayed the punitive nature of the modern policy approach underpinning the welfare changes in Epoch Four. The implication generated centred on the “punishment” aspect (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 20, Dr Carmen Lawrence, Member for Freemantle, WA, Opposition Australian Labor Party; Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 6, Macklin, Opposition, Australian Labor Party; ABC, 2002a, 2002b, 2002c).

Indeed, paradoxically, the Commonwealth Government reported that the changes were not designed as a regulatory tool to punish people with a disability reliant on disability income support. Yet, counter discourses noted that the measure was in effect a form of punishment as the changes reflected a “punitive compliance mechanism” because it linked mutual obligation to productive citizenship and functioned to counter the struggles of the disability rights movement for structural change (Galvin, 2004; Jakubowicz & Meekosha, 2002; Prideaux, Roulstone, Harris & Barnes, 2009). An extract from the counter discourses reveals the “punishment” discursive theme, embedded with ideology: *“punitive sanctions [were embedded in the policy] for those welfare recipients who they [the Government] felt were not undertaking sufficient activities to improve their employment prospects”* (Sherry, 2002, p. 6). Other counter discourses such as Opposition Dr Lawrence communicate the harsh nature of the Howard Government policy changes to disability income support and the relationship between Commonwealth authority, regulatory control and increased sanctions for people with a disability in receipt of the Disability Support Pension.

In cementing the regulated disabled citizen idea, Commonwealth authority manifested a new legality to advance a modern interpretation of disability income support through parliamentary, legislative and institutional changes. The use of the regulated disabled citizen discourse presumed to transcend the failings of the change strategies in previous epochs to deploy economic principles as the dominant ideology (Gramsci, 1977). This rhetorical device makes it ideological in that it attempts to manifest a different interpretation of disability income support policy, while simultaneously maintaining dominant hegemonic principles (Gramsci, 1977, 1996). The following extract indicates that considerable weight was given to

the new legality of the mutual obligation initiative as the mechanism to address the presumed worklessness of disability income support recipients:

*This Government has reinforced Australia's safety net, but we also believe in the principle of mutual obligation. By this I mean not only that individuals ought to do something in return for the support they receive from society, but also that in order for society and the government to help people in need, they need to be willing to do something to help themselves. Far from undermining social protection, policies that promote responsible behaviour and self-reliance are essential pillars of a compassionate Australia.* (Cited in J. Howard, 2006, p. 3)

In this illustration, the shifting perceptions are captured where the Commonwealth authority discourse does not portray the Government as having a social obligation to the wholesale social protection of people with a disability through disability income support system. The next discursive formation applies a dichotomy to draw out contrasting features of active and passive welfare in an attempt to garner support for the change strategy: *"people anaesthetised by passive welfare ... [the changes would help people] to develop their skills and awaken an enthusiasm for independent life"* (Commonwealth of Australia, 2000, the then Prime Minister Howard). Here, the metaphor "people anaesthetised by passive welfare" suggests that people with a disability reliant on disability income support have lost motivation in looking for employment. This discursive formation provides structured coherence to the welfare changes and the regulation of disability pensioners. The next phrase, particularly "awaken their enthusiasm" for independence and self-reliance, highlights the targeted group which requires compelling and brings together the motivator for change to form a coherent commonsense worldview of the change strategy (Gramsci, 1977). In this sense, the phrase speaks of active welfare as a universal, therefore recontextualising the change strategy of targeting disability income support as a given, rather than a struggle for securing rights. Thus, support can be garnered from the wider so-called able-bodied population.

The Hansard speeches and Howard Government policy documents revealed the dialectical relations in the targeting of disability income support. The shift toward an even tighter active participation support system emphasised moral elements and promoted individual responsibility as a means of generating greater self-reliance and capacity-building through linking rights of entitlement to reciprocal duty to work (Newman, 2000; Reference Group on Welfare Reform, 2000). Citizenship under Commonwealth authority discourse in Epoch Four came to represent productive citizenship through a valued contribution to the workforce and demonstrated in the following discursive frame: *"engaging in the economic and social life of our nation"* (Australia House of Representatives, 2005b, p. 38, Kevin Andrews, Member for Menzies, VIC, Liberal Party). Thus, incentives built into the policy changes to disability income support were used to compel people into the labour market, as shown in the following extract: *"[the incentives were designed to shift people with a disability] from income support payments to increased participation in paid work"* (Commonwealth of Australia House of Representatives, December 1, 2005b, p. 14, Christopher Bowen, Member for



Prospect, NSW, Opposition Australian Labor Party). From this stance, a work incentive in the form of a regulatory mechanism was required to prevent idleness and dependency on the income support system (Australian Broadcasting Corporation [ABC], 2006; Newman, 2000; Reference Group on Welfare Reform, 2000). In these accounts, the work incentive and the regulated disabled citizen discourse established credence through the expression of being the logical and right approach to disability income support policy.

Commonwealth authority and the regulated disabled citizen discourse formed part of the process of differentiation, which separated people reliant on income support from people who work. Prideaux et al. (2009) and Roulstone (2000) referred to these forms of policy constructions as being part of the victim blaming discourse and social exclusion discourse used to stereotype people with a disability receiving income support benefits. The policy language contained within parliamentary discussions often used suggestions of long-term welfare dependency in order to shift away from a presumed passive income support to an active income support policy approach. An extract shows the implications of the welfare dependency label and breaking the shackles of welfare dependency rhetoric together with the targeting of disability income support:

*The welfare dependency label ... focused the blame for the alleged rising incidence of welfare abuse upon the government itself, thereby legitimating program changes and a tightening up of eligibility criteria. The introduction and extension of mutual obligation provisions over the past decade is all part of a broader neoliberal reform agenda to reduce the number of people on welfare, reduce budget outlays on social welfare and reinforce the work ethic.* (Cited in Engels, 2006, p. 12)

Here, the excerpt revealed the legitimising process whereby relabelling the policy problem as a deviant problem, was used to justify the policy response and gain public support for implementing tighter controls over vulnerable groups, such as disability income support recipients.

Another excerpt reveals the hegemonic principles used to support the regulated disabled citizen discourse, tighter targeting of disability income support recipients and the introduction of work requirements:

*Recipients of welfare support are considered to be behaviourally deficient and engaging in the defrauding of the Commonwealth, through their decision to claim income support. Welfare reform on the part of the Howard Government is therefore seen to be an attempt to modify such deviant behaviour.* (Cited in Engels, 2006, p. 6)

Hence, the strategic use of labels and stereotypes functioned to legitimate the tighter targeting of the disability income support system. The use of labels and stereotypes formed part of the rhetorical device employed by the Howard Government in Epoch Four to secure Commonwealth authority in the targeting of disability income support. The policy focus,

based on Commonwealth authority and the regulated disabled citizen discourse, was designed to reduce the burden on working citizens and emphasise the obligations of disability income support recipients and the unemployed. This ideology of the regulated disabled citizen denotes the hegemonic strategy used by the Howard Government to secure neo-liberal principles and strong Commonwealth authority in the regulation of people with a disability reliant on disability income support (Gramsci, 1977).

### ***The hidden unemployed theme***

In Epoch Four, the policy stance based on preventing welfare dependency gained further legitimacy through the use of discourses that represented the welfare state in terms of supporting significant numbers of people who could otherwise support themselves (Newman, 2000; Reference Group on Welfare Reform, 2000; Saunders, 2004a, 2004b, [CIS]). Therefore, according to the Newman (2000) and the Reference Group on Welfare Reform (2000) policy documents, the changes to income support, most particularly disability income support, would redress the rising costs associated with the perceived socio-economic consequences of welfare dependency. Highlighting the costs in economic terms operated to strengthen the policy position. This moral/intellectual function can be demonstrated in the discourse by Newman (2000): “*as a nation, we already spend over \$50 billion per year on welfare payments and services*” (p. 10). Similar messages, such as the high costs claim reinforced the proposal for reducing welfare expenditure, as shown in these extracts: “[welfare recipient figures are] *alarmingly high, costing the taxpayers almost \$7.5 billion a year*” (Costello, 2005a, 2005b; Kirk, 2004a, 2004b), and “[our Government needs to] *rein in the burgeoning cost of the disability support pension*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 12, Peter Andren, Member for Calare, NSW, Independent).

In later speeches, arguments were made that during an era of low unemployment there should be less people reliant on income support (Andrews, 2005a, 2005b, 2005c, 2005d, 2005e; Garnaut, 2006). This assumption was found in the following excerpt from a parliamentary speech by the then Minister Andrews (Liberal Coalition Government): “*it is unacceptable to have 2.6 million people, or 20 per cent of working age Australians, on income support. More than 1.3 million people in receipt of income support have little, if any, participation requirements*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 38, Andrews). These illustrations demonstrate the discursive formations used to promote the welfare dependency argument and legitimate the targeting of disability income support. The orders of discourse brought structured coherence and logic to the policy change. The hidden unemployed theme became a powerful dominant hegemony in the strategy to secure Commonwealth authority.

The policy language helped to defend the push for tighter restrictions and work requirements on disability income support provision. The assumption held by the Government and policy commentators, such as Saunders (2003, 2004b, 2005a, 2005b, 2005c, 2007a, [CIS]), centred on the idea that the disability income support system was highly “generous” and obscuring the actual number of the hidden unemployed: “[approximately] 700,000 people [were] ... *sheltering on the disability support pension*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 37, Andrews; Newman, 2000, p. 17; Reference Group on Welfare Reform, 2000; Saunders, 2003, 2004b, 2005d, 2005e, 2005f, 2007a, [CIS]). The following extracts demonstrate the consistent theme of generous nature of disability income support and hidden unemployed. The then Treasurer Peter Costello made the claim: “*many remain on [disability] income support for long periods, and we [Australia] have one of the lowest rates of employment for disability pensioners ... such a passive system works against the goal of encouraging people to ... work*” (Cited in *Sydney Morning Herald*, 2004). Using the language such as “passive system” and “long periods” perpetuated the assumption that unemployed people, including people with a disability, lacked both the desire and motivation to find work. The next extract reveals the dominant ideology: “[people in receipt of income support were] *cruising dole recipients who enjoy being unemployed and have no intention of seeking work [or were] disengaged, not interested in getting a job, not interested in looking for work*” (Mal Brough, then Employment Services Minister, Liberal Party, ABC, 2002c). These claims using metaphors of “cruising dole recipients” and “disengaged” position the Government as the only authority to intervene and instill incentives, in effect legitimising their regulatory control.

From the logic explored in the above excerpts, the claims suggest that better targeting would function as an incentive to promote workforce participation of disability income support recipients. This assumption is demonstrated in the following extract in which the discourse justifies the use of tighter targeting measures as a mechanism for the promoting economic participation: “*explicit encouragement to people with capacity to use these [disability] services and later to undertake ... job search [activities]*” (Newman, 2000, p. 18; Reference Group on Welfare Reform, 2000). The suggestion contained in the discursive formation was that people with a disability were remaining idle and jobless given that they represented more than half of the overall number of people receiving a welfare payment. Hence, the disability income support system was construed as an untenable and indefensibly high cost to the welfare sector, and was essentially contributing to idleness and dependency. Thus, the system required intervention together with the scaling back of public expenditure. The repetitiveness of the policy language in parliamentary speeches functioned to secure the Commonwealth’s hegemonic vision of a viable alternative in the form of tighter eligibility requirements.

### **Tighter eligibility requirements: “Partial capacity to work”**

Commonwealth authority operated in conjunction with economic fundamentalism and functioned to justify the pulling back on disability income support expenditure (Galvin, 2004; Roulstone, 2000). The new legality through the introduction of work requirements and tighter eligibility requirements gave legitimacy to the hegemonic principles. The power of the Commonwealth authority was reflected in the new requirements and the tightening of eligibility criteria for the Disability Support Pension. This also represented a new hegemonic bloc (Gramsci, 1977).

In the lead up to the changes to disability income support policy, parliamentary discussions outlined the implications of the welfare-to-work legislation:

*Schedule 2 of the Employment and Workplace Relations Legislation Amendment (Welfare to Work and Other Measures) Bill 2005 introduces a similar transition of certain new applicants for the disability support pension to Newstart allowance.<sup>35</sup> The bill introduces a stricter work test for those applying for the disability support pension, with a new definition of ‘partial capacity to work’.* (Commonwealth of Australia, House of Representatives, December 1, 2005b, pp. 11-12, Peter Andren, Member for Calare, NSW, Independent)

Thus, for the Government in Epoch Four, permanently incapacity and work capacity was redefined as “partial capacity to work”. The partial capacity to work discourse within the new hegemonic legality of greater activity requirements was assumed to be the mechanism for increasing the productivity of people with a disability. The legislation and institutional practices are constructed in such a way as to impose greater penalties for non-compliance (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 14, Bowen, Opposition Australian Labor Party; Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 19, Dr Carmen Lawrence, Opposition Australian Labor Party). As the welfare changes are legislatively based, the discursive formation establishes an unquestioned and assumed logical requirement that people with a disability reliant on disability income support will be productive citizens (Gramsci, 1977, 1996). This reflected a new form of bureaucratic centralism to reinforce hegemony.

The May 2005 Federal budget heralded the changes to the disability income support system which subsequently came into effect on 1 July 2006. Essentially these changes related to tighter eligibility requirements and even greater activity requirements, including job search (Commonwealth of Australia, House of Representatives, December 1, 2005b, pp. 11-12, Andren; A. Harding, Ngu Vu & Percival, 2005a, 2005b). The historic securing of Commonwealth authority and implementing hegemonic dominance through compulsion mechanisms is demonstrated in a parliamentary speech by Andren (2005b):

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<sup>35</sup> The intent of the Newstart Allowance is to provide “*short-term income support for individuals seeking full-time employment*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 10, Andren).

*This test basically means that those who are assessed as being able to work at least 15 hours a week will go on the enhanced Newstart allowance rather than DSP. This change will not apply to those already on DSP as at 11 May 2005. Those who claim DSP after 11 May 2005 and before 1 July 2006 will be subject to the new test at their two- or five year review, and the test will apply immediately to all those who claim DSP from 1 July 2006. (Commonwealth of Australia, House of Representatives, December 1, 2005b, pp. 11-12, Andren)*

Further, the rationale incorporated two conditions:

*Those who no longer qualify for DSP will be moved onto the new, enhanced Newstart allowance on a payment rate \$84 less than the disability pension. They will also be subject to the requirements of the Newstart allowance activity test and breaching provisions. (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 12, Andren)*

In these accounts, the legislated welfare changes represent the emergence and constitution of a new conception of disability and Commonwealth authority based on regulation, social control and coercion.

The above excerpts highlight the eligibility requirements as a precondition for disability income support which changed from permanent incapacity for work (featured in Epochs One and Two) and new medicalised criteria (featured in of Epoch Three), to a partial capacity to work in Epoch Four. The previous Hawke-Keating Governments in Epoch Three used the condition that an individual with a disability could receive the Disability Support Pension if judged capable of working 30 hours per week. Tighter requirements were applied in Epoch Four under the Howard Government. In Epoch Four, under the new requirements for disability income support (following 1 July 2006), people with a disability assessed as capable of working between 15 and 29 hours per week, would be shifted to Newstart Allowance (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 26, Bernard Ripoll, Member for Oxley, QLD, Opposition Labor Party; A. Harding et al., 2005a, 2005b). It was expected that those people who have a disability who applied prior to 1 July 2006 continued receiving the Disability Support Pension (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 26, Ripoll; A. Harding et al., 2005a, 2005b).

The underpinning assumption of the changes to eligibility requirements in Epoch Four centred on the notion that the historical terms of incapacity and permanently incapacitated equated with being unable to work. Therefore, the inference was that people with a disability in receipt of the Disability Support Pension were unable to participate in a meaningful way. It was for this reason that the Government believed that the criterion partial capacity to work provided an incentive for people with a disability to work. However, the criterion of partial capacity to work has profound implications for people with a disability. The mechanism was designed to shift those people who were presumed to be rorting the disability income support

system or shifting people with a disability who were not contributing to the labour market onto the Newstart Allowance (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 52, Fergus McArthur, Member for Corangamite, VIC, Liberal Party; Galvin, 2004).

Similarly, the re-classification of the disability concept was consistent with the discursive frames used by the Howard Government as re-classification was dependent upon the use of rigid and deterministic disability measures, which operated to extend the power and control of the Commonwealth authority (Humpage, 2007, p. 224). An excerpt from Humpage (2007) highlights the rigid determinism surrounding measures of disability and stringent eligibility requirements which remained an extension of compliance mechanism and Commonwealth authority: “[it reflects the] *surveillance and compliance for welfare recipients ... that already dominates the welfare system*” (p. 225). People with a disability were expected to re-submit medical evidence of their impairment and they were re-assessed under new criteria; this served not only to inconvenience bona-fide applicants, but also remove those persons who were deemed capable of working. The success of coercive measures lies in the way the Howard Government used a form of passive revolution to re-classify and reconstruct the disability conceptualisations from permanently incapacitated to partially capacitated to work. This discourse connected with legal and institutional practices provided a historic break from previous epochs (Gramsci, 1977, 1996).

#### ***“Incentive by punishment policy” and the “mean-spirited crackdown”***

Commonwealth authority perpetuated an “incentive by punishment” consequence, rather than a mechanism for ensuring the social justice and rights of people with a disability. The punishment outcome derived from the coercive use of incentives to compel people with a disability into the workforce. The language espoused by the Government (such as productive citizen, partial capacity to work, and welfare dependency) incorporated the incentive by punishment policy, which in effect was an incentive based on fear, rather than a reward incentive (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 19, Dr Lawrence). In a similar vein the compliance mechanisms built into the welfare changes policy perpetuated a fear incentive, given that the legislation functioned as a disincentive to finding work. The following parliamentary speech extract demonstrates the fear incentive:

*Once they are off the disability support pension, getting back on it may be quite difficult. Therefore, given that it is a gamble for them to take employment at the risk that they will be unable to sustain it or that the job that they do obtain will not last, it will be a very big disincentive against them seeking work.* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 20, Dr Lawrence)

Clearly, as the above illustration indicates, the increased regulatory measures tended to promote the need for people with a disability to remain on the Disability Support Pension, rather than risk losing the disability pension payment.

At the heart of the counter views was the perception that the disability income support policy change reflected a “carrot and stick” approach (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 19, Dr Lawrence) which tended to punish the most vulnerable people in the community, that is, people with a disability reliant on disability income support. For example, an excerpt from a longer parliamentary speech by Lindsay Tanner (Member for Melbourne, VIC, Opposition Australian Labor Party) is typical of the counter discourses showing the implications of the legislative changes:

*The last thing we need is this kind of nasty, resentful, mean-spirited legislation that is simply designed to pander to prejudice in sections of the community, that is designed to make the Howard government look like it is **cracking down on bludgers** [emphasis added] when in fact what it is going to do is create a great deal of suffering and disadvantage and further restrict the opportunities for people in our community who already do it tough, who already have significant problems and who really have to battle to get a decent fair go.* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 33, Tanner)

The counter discourse of the “mean-spirited crackdown” seen in the “cracking down on bludgers” phrase (Lines three and four in the Commonwealth of Australia, 2005b excerpt) was employed as a rhetorical device by opposition voices to reveal the policy consequences of the ideology of targeting disability income support. The use of the fair go discursive frame was designed to generate distinctions between the coercive welfare changes to disability income support and those based on universal and social justice principles (Gramsci, 1977). The connotations generated by the changes to disability income support perpetuated assumptions that being in receipt of disability income support equated with being a bludger on the system. Counter discourses sought to reveal the consequences of the Howard Government disability income support policy changes.

An excerpt from a counter discourse, disability theorist Galvin (2004), reveals the exclusionary nature of the incentive by punishment policy and language. The excerpt highlights that the policy and language tended to become dependent upon compulsion measures: “[the policy is based on] coercion and is steeped in individualism and economic rationalism [rather than principles of] empowerment and social justice” (Cited in Galvin, 2004, p. 348). In advancing this further, an extract by Gibilisco (2005) expresses ethical concerns regarding the treatment of disability income support in relation to the policy:

*[The legislative changes to disability income support policy] will not only affect those disability support pensioners who can and do work over 15 hours per week, but seriously worsen the quality of life of most people with disabilities.... These welfare reforms will ultimately reduce the budgetary burden of people with*

*disabilities. The focus of the reform is on cost cutting, not on improving the lives of people with disabilities. (p. 53)*

Thus, the illustrations by the counter discourses of Galvin (2004) and Gibilisco (2005) both indicated that the changes to the disability income support system emphasised the incentive by punishment policy and cost cutting, as opposed to employment creation and better quality of life outcomes for people with a disability. The counter discourses reflected the social movements struggle to provide an alternative transformative strategy to the dominant disability income support policy and economic fundamentalist discourse (Gramsci, 1977). The counter discourses offered oppositional language of “incentive by punishment” and the “mean spirited crackdown”.

### **Compliance and regulation: Adding administrative complexity to disability income support**

The data revealed that in effect, the new requirements brought about by the changes to disability income support together with the mutual obligation initiatives were highly complex and administratively costly. Overall, the addition of administrative changes, rather than redressing the historical challenges of the disability income support system, generated a highly bureaucratic and convoluted system. This is particularly so when compared with similar employment and income support systems in other Western industrial countries (for example, Work-Fare schemes in the United States of America) (Goodin, 1992, 2001, 2002). In the attempt to curtail welfare expenditure, the difficulties associated with determining measures of disability (as identified in the previous Epochs One, Two and Three) and mutual obligation requirements added an unnecessary complexity to the disability income support system and social security system as a whole. A counter discourse by Lindsay Tanner (Opposition Australian Labor Party) reveals a similar concern:

*There are a number of ancillary consequences that will flow from the legislation. For example, we are now going to have for an extended period of time three separate categories of disability support pension recipients. It will start to resemble the complexity that we see in the superannuation system. (Commonwealth of Australia, House of Representatives, December 1, 2005b, pp. 29-30, Tanner)*

High costs were associated with determining levels of impairment (medical) and administering the mutual obligation schemes together with generating erroneous “distinctions” between categories of disability in order to determine partial capacity to work (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 47, Kelly Hoare, Member for Charlton, NSW, Opposition Australian Labor Party; Tomlinson, 2001a, 2001b). For example, contradictions were identified in which efficiencies were sought in the disability income support system, yet administrative complexity contributed to higher costs. This form of bureaucratic centralism reflects the way the new legality and institutional practices when aligned with economic fundamentalism functioned as a ‘policing organism’.



The complexity emerging from bureaucratic centralism operated to obscure hegemonic dominance of the policy (Gramsci, 1977).

This obscuring of hegemonic dominance is evident whereby the Howard Government expended \$3.7 billion to enhance employment services (such as, privately contracted job networks) and other assistance (such as rehabilitation) for people receiving income support who have work activity requirements to meet (Costello, 2002, 2005a, 2005b; Kirk, 2004a, 2004b; Ramier & Carney, 2001). What was not acknowledged in the Howard Government policy documents, parliamentary speeches and media articles was that this money could have been used to increase opportunities for people with a disability to access valued status jobs. Similarly, the money could have been used for the Government to generate work creation schemes including providing an efficient, equitable, non-disabling income support system (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 37, Hoare).

## **ii. Conservative paternalism discourse involving charitable and punitive values**

The discourse of conservative paternalism, in Epoch Four, functioned to punish people with a disability reliant on disability income support. The following four sub-themes emerged from this theme of conservative paternalism:

- conservative paternalism and genuinely worthy of a disability pension;
- moral condition: Disability income support as an “earned right”;
- from a “Fair Go” to “Having a Go”: Reframing genuinely looking for work; and
- re-classifying disability: Job ready and capable.

### **Conservative paternalism and genuinely worthy of a disability pension**

Conservative paternalism discourse perpetuated stereotypical assumptions about what is considered valued and good behaviour. Conservative paternalism functioned to epitomise certain social norms valued in society, particularly in relation to people with a disability. This was played out in the policy language whereby connections were formed between notions of capacity and productivity which meant that reliance on disability income support was made synonymous with worklessness and malingering. Parliamentary documents were replete with instances of the genuinely worthy of a disability pension discourse.

An example of the use of genuine need and genuinely worthy discourse was evident in the following extract of a policy speech by then Prime Minister J. Howard:

*‘We [the Howard Government] are going to encourage people from welfare back to work. Indeed, we’re going to put some incentives in and we’re going to put some penalties in if people have a genuine opportunity to return from welfare to work and they don’t do it.’* (Cited in Commonwealth of Australia House of

Representatives, December 1, 2005b, p. 17, Christopher Bowen, Member for Prospect, NSW, Opposition Australian Labor Party)

In this account, mutual obligation is the mechanism that ensures only those people with a disability deemed worthy of disability income support receives the disability pension. Similar inferences of the genuinely worthy of a pension discourse were found in the Newman (2000) policy document: *"the Government will ... continue to provide a strong social safety net for people in genuine need, through the payment of pensions ... to people who need our help ... [there]by reducing welfare dependency"* (p. 10). This account operates to embed the deserving poor rhetoric and give rise to the common sense nature of stringent welfare requirements. Government Ministers, Andrews (2005a, 2005b, 2005c, 2005d), Brough (2001), Costello (2002, 2005a, 2005b) and Dutton (Cited in Kirk, 2004a, 2004b), including political commentators, such as Saunders (2004a, 2004b, 2005d, 2005e, 2005f, [CIS]), all claimed that tightening the definition of disability meant that only the genuinely worthy people with a disability would be assisted.

Oppositional discourses by disability social theorists (such as Gibilisco, 2003, 2005 and Roulstone, 2000) attempted to counter the deserving poor ideology by drawing attention to the misuse of the malingering inference. For disability social theorists the notion contained ideologically imbued value judgments, rather than sound empirical foundations. For example, an extract reveals the hegemony of the malingering discourse:

*Very little empirical research has been undertaken to explore the anecdotal claims of malingering. The rhetoric of barriers ... and unused abilities seems to be less in evidence than a punitive sifting process and a return to Draconian social policy. Here, social policy can be seen as based increasingly on anecdote rather than empirical research. Clearly, the cost saving imperatives identified in treasury documents [concerning social security] ... are important in this redrawing of the disability category.* (Cited in Roulstone, 2000, p. 435)

Here, the discursive formation reveals the connection between conservative paternalism discourse and punitive measures in the re-categorisation of the disability concept. Hence, the notion of malingering and idleness has connotations of the deserving poor rhetoric. Thus, the shift in language underpinning the tightening of the disability income support system, remained tied to notions of deserving and undeserving poor (Galvin, 2004; Gramsci, 1977; Standing, 2002, 2004, 2005a, 2005b). Distinctions were generated between genuinely disabled, genuinely needy and deserving and those who were considered undeserving and unworthy of disability income support.

The consequence of promoting deserving and undeserving distinctions was the tendency to generate stereotypes which, in turn, associate being reliant on disability income support with malingering:

*Australia is still in the Dark Ages when it comes to issues associated with disability. We readily accept the often dramatic curtailment of opportunity and*

*enjoyment of life which serious disabilities impose on our fellow citizens and we are very susceptible to every passing urban myth about bludgers and malingers.*  
(Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 32, Tanner)

Here, the counter discourse provides insight into the way the discourse of genuinely worthy of a pension is a form of 'normative grammar' in which dominant language is constructed as the universal and ideal (Gramsci, 1977). The naturalising tendency is found in the assumption made 'if an individual is deemed genuinely needy' (*the ideal*), then the assumption promotes the idea that they should receive a disability pension. In contrast, if, an individual is found to be unworthy of receiving a disability pension, then they are somehow malingering. The above excerpt highlights the power of naturalising myths and the use as a device for the Howard Government to secure hegemonic dominance. The counter discourses further revealed the relationship between conservative paternalism, genuinely worthy of a pension discourse and a lower social status. An extract by Schneider (2005) demonstrates the connection:

*By virtue of falling into the category of the 'disabled' people with conditions cannot be seen as equal members of society. This language helps to shape the hegemonic idea that people with conditions are inferior to those people who are seen as 'normal' by society.* (p. 5)

The above excerpt reveals the way conservative paternalism shapes perceptions about people with a disability in receipt of disability income support. The genuinely worthy of a pension discourse and portrayal of harsh and punitive nature of the changes to disability income support was captured in a political cartoon, Figure 12, entitled "Disability Pension crackdown too heavy".



**Figure 12:** Cartoon by Nicholson from "The Australian" newspaper:  
<http://www.nicholsoncartoons.com.au>

In this cartoon, the idea of a lower social status and assumptions of malingering on disability income support are brought to the foreground.

The data revealed that further deserving poor distinctions were made in the preferential treatment of some groups as opposed to other groups. For example, where disability income support was targeted, the same treatment was not applied to those who were considered productive, such as self-funded retirees. The following excerpt reveals the separate treatment: “*self-funded retirees ... [received] generous tax reductions ... but when it comes to ... people on the disability support pension ... [they become] the undeserving poor ... who need to have their payments reduced*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 31, Tanner). This illustration communicates the rhetorical device used by the Howard Government to legitimate the special treatment of genuinely needy groups. The separate treatment of particular groups derived from the assumption that employed and productive citizens had earned their right to a benefit based on their presumed economic and social contribution to society. These groups were considered deserving and genuinely needy, and therefore requiring of special treatment. The preferential treatment justified by the generous treatment of groups considered to be deserving, implied that some people with a disability reliant on disability income support, were not worthy of a pension. The preferential treatment also generated assumptions of that disability income support recipients were somewhat of a burden on society. These examples demonstrated the policy implications for people with a disability that were constructed along the lines of the principles underpinning the Poor Laws (1800s).

### **Moral condition: Disability income support as an “earned right”**

The idea of an earned right operated differently in Epoch Four, than it did in Epoch One. The construction of the moral condition in terms of disability income support as an earned right was contextualized and recontextualised in Epoch Four. The disability income support as an earned right discourse suggested just that people with a disability need to earn the right to receive disability income support and would no longer be entitled to automatically receive the Disability Support Pension. Here, conservative paternalism discourse was reflected in the notion that “being reliant on income support” required some form of intervention by the Commonwealth Government. The policy rhetoric indicated that for people receiving disability income support it was no longer assumed to be appropriate to continue relying on income support without having any obligations to find work. This earned right ideology was found in the phrase “[the Disability Support Pension is] *not an unconditional grant*” (Cited in Newman, 2000, p. 6). The paternalistic concern established credence through the suggestion that the policy initiatives would reduce the burden of disability income support on those who were presumed to be genuinely working and productive. Further, the assumption presented people with a disability reliant on disability income support as a threat to progressing the

nation's fiscal policy, as shown in the frame: "*future economic advances*" (Cited in Andrews, 2005a, p. 5).

However, different treatment occurred between productive citizens and purportedly unproductive unemployed whereby the productive citizens were afforded no such conditions or obligations. This differential treatment is illustrated in the following excerpt:

*Moving from welfare to work helps people achieve higher incomes and a better standard of living, participate in mainstream social and economic life and achieve a better future for their families. It also reduces the obligation on taxpayers, creating a positive cycle of work, higher incomes and more sustainable and better targeted welfare expenditure.* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 38, Andrews)

Perhaps the most concerning representation emerging from this excerpt was the social relations of ideology and power found in the presumption that disability income support was an "earned right" and only held "by decent responsible citizens" who were gainfully employed. Discourses supporting the Howard Government policy approach indicated that disability income support needed to be an "earned right". This assumption was based on the myth that without some form of participation requirement is required to uphold the moral and economic fabric of society. This assumption is evident in the phrase: "[an] *obligation-free welfare* [system will] *reduce the standards ... of society*" (Sullivan, [CIS], cited in Thornton, 2000). This illustration from a media article demonstrates the rhetorical device used to support the targeting of disability income support. The illustration also reveals the power of ideology in generating public misconceptions through the perpetuation of myths associated with disability income support. As a moral condition, the assumption of disability income support as an earned right functions to perpetuate the myth that without some form of conservative paternalistic condition placed on people with a disability reliant on disability income support, then society will suffer. The ideological function of this representation, through the use of dominant media, in turn generates what Hall et al. (1978) and Hall et al. (2006) identified as moral panic discourse, which serves to legitimise the targeting of the disability income support system. It also serves to strengthen the Howard Government's hegemonic dominance through the formation of a historic bloc. Given this analysis, the government's claims in Epoch Four become common sense, thus assuming the acceptability of the Government to intervene. Paradoxically, the Government paternalistically considers it to be an earned right for the government to intervene.

### **From a "Fair Go" to "Having a Go": Genuinely looking for Work**

Conservative paternalism discourse perpetuated the assumption that reliance on disability income support undermined the social and economic good of the community. In establishing credibility for the change process, official discourses redefined the fair go notion to having a go. The discourse in the McClure Report (The Reference Group on Welfare Reform, 2000) gave credence to the having a go rhetoric and attitudinal change by proclaiming: "[there is]

*strong community support for the idea that individuals should avail themselves of appropriate opportunities for economic participation*" (p. 33). Where the previous Hawke-Keating Governments (Epoch Three) introduced the association between reliance and income support, the Howard Government (Epoch Four) was instrumental in reframing the expectations held by the Howard Government and changing community attitudes.

During Epoch Four, the principle of a "fair go" was discursively transformed, as shown in the following excerpt:

*Equality of opportunity and equality of treatment, of 'doing the right thing' and ensuring that all Australians are given 'a Fair Go'. Self reliance and the concept of a fair go are values prized by individuals, but Australians also have a particular way of seeing themselves collectively as a people. 'Having a Go' – fourth value and moving forward. (Commonwealth of Australia, 2000, the then Prime Minister Howard)*

In this statement, the "fair go" principle was not at all like the Chifley Government vision identified in Epoch Two. Rather, a "fair go" was appropriated into economic language to denote obligations and responsibilities attached to individual self-reliance, rather than equality. Hence, people with a disability in receipt of disability income support, were expected to "have a go" at looking for work to be deserving of a pension. Employing the principles of a "fair go" and "having a go" suggested that the Government policy was legitimately egalitarian, when, essentially, it was a harsh and punitive policy. The illustration also reveals the discursive formation used by the Government to garner support for the notion of "having a go" (Gramsci, 1977). The ongoing ideological work of the rhetoric in government policy (having a go and genuinely looking for work) functioned as a form of hegemonic maintenance to achieve support for the policy and perpetuate the dominance of the status quo. The having a go discourse and genuinely looking for work ideology achieved a distinct degree of stability and consistency.

An implicit suggestion underpinning policy speeches was the idea that the community favoured such a stringent paternalistic response to preventing welfare dependency. Policy speeches were also replete with suggestions the Howard Government had gained approval for the welfare changes from the broader community. The pervasiveness of the ideology is found in the advancement of the dominant idea that having a go equated with genuinely looking for work. By advancing this persuasive discourse a national commonsense and wide acceptance is established (Gramsci, 1977). This is shown in an extract from the then Prime Minister Howard: *"the community has overwhelmingly accepted the value of mutual obligation and in particular 'working for the dole'"* (Commonwealth of Australia, 2000, the then Prime Minister Howard). The broad uncritical acceptance of the welfare changes to the disability income support system by some proponents in the community is indicative of the power of the Government rhetoric.

While some questioning of the intrinsic worth of the policy initiatives occurred, the representation in the mainstream media often portrayed an overwhelming support of the policy. This definition of having a go became an accepted worldview and in turn de-stabilised the entitlement and fair go principles, while simultaneously blocking attempts at resistance by counter discourses. For example, an editorial in a broadsheet put forward the question to the general public: “*do you think some people on disability support pensions are capable of working?*” (Cited in “Place and time” editorial, *The Courier Mail*, 2005, p. 14). The majority of printed responses were in the affirmative, including comments such as “*I don’t think it is a bad thing – [kind of] like work for the dole*”; “*sure, some can work and are claiming they can’t*”; and “*yes, I’m sure there is something they can do*”. In order to project some semblance of balance, they incorporated one response in the negative: “*no. They are evaluated for the pension so if they didn’t fit the criteria they wouldn’t be receiving benefits. They need all the support they can get*” (Cited in “Place and time” editorial, *The Courier Mail*, 2005, p. 14). The depictions in the affirmative and the Government’s rhetoric seem to reflect Tomlinson’s (2007a) notion of “downward envy” whereby the language used concealed the reality of the experience of people with disability reliant on disability income support.

The connected assumptions which gained ground in Epoch Four included those practices and discourses already outlined above: “*individual actions contributing to poverty*” (Abbott, cited in Marris, 2001), “*dole bludger*”, “*malingerer, non-performer*”, “*genuinely disabled*” and “*genuinely seeking work*” (ABC, 2002a, 2002b, 2002c, 2004a, 2004b, 2005a, 2005b, 2005c; Brough, 2001; Commonwealth of Australia, 2002b, 2002c; Saunders, 2005d, 2005e, 2007a, 2007b, [CIS]; Vanstone & Abbott, 2001). In Epoch Four, the Government reframed genuinely looking for work to entrench conservative paternalism and differentiate its policy position from the Fraser Government’s employment of the phrase (identified in Epoch Two). This reconstitution allowed for transformation and a historic bloc (Gramsci, 1977). Within Epoch Four, genuinely looking for work was not only linked to deserving poor notions, but also the coercive stance adopted in the policy. The illustrations revealed assumptions that disability pensioners were expected to be job ready and capable of working.

### **Re-classifying disability: Job ready and capable**

Underpinning the conservative paternalism discourse were the policy principles of independence, participation and access. The concepts of independence, participation and access were closely related to the principles of being job ready and capable of working. Referring to people with a disability, the then Minister Andrews (2005a) used the discursive frame of “capable” to reinforce the logic of transitioning to a different payment: “*if a person is **capable** [emphasis added] of working and they are not working then the appropriate payment is the unemployment benefit, namely Newstart*” (p. 3). Here, the discourse affirmed the assumption that income should be derived from a job, as opposed to income support (ABC, 2005a, 2005b, 2005c, 2005d, 2005e; Andrews, 2005a, 2005b, 2005c, 2005d, 2005e;

Andrews & Hockey, 2005; Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 38, Andrews; Commonwealth of Australia, House of Representatives, June 22, 2005c; Commonwealth of Australia, House of Representatives, February 14, 2006a; Commonwealth of Australia, House of Representatives, May 11, 2006b; Commonwealth of Australia, House of Representatives, May 22, 2006c; Commonwealth of Australia, Senate, March 27, 2006).

The McClure Report (Reference Group on Welfare Reform, 2000) provided the initial justification for intervention by the Government by using intergenerational theories of welfare dependency to garner support for the welfare changes. The illusion of scientific empiricism provided undeniable justification for Commonwealth intervention, which is illustrated in the following statement: *“without appropriate action ... Australia may be consigning large numbers of people to an intergenerational cycle of significant joblessness”* (Cited in Reference Group on Welfare Reform, 2000, p. 3). Conservative paternalism discourse gives justification for the government intervening in the lives of disability pensioners. Similarly, the having a go ideology when used in conjunction with individuals being job ready and capable shapes a new national identity which presumes every citizen must play their part in being an active citizen (Gramsci, 1977, 1996). The hegemonic appeal of the having a go and job ready and capable discourses centred on aligning economic principles with traditional conservative paternalism to produce a new interpretation of conservative paternalism based on the worthiness of individual self-reliance.

For the Government, independence was closely linked to self-reliance, that is, the capacity to do for oneself, without assistance from the Commonwealth. In contrast, counter discourses by disability social theorists (Abberley, 1998; Barnes et al., 2002; Galvin, 2004; Gleeson, 1998; Standing, 2002; Swain, French & Cameron, 2003) argued that independence for the disability movement referred to attaining an adequate standard of living through increased participation and access to necessary social resources. These disability social theorists also challenged the notion of independence and preferred the term interdependence in recognition of the interconnectedness of social relationships among people – with or without a disability.

Participation and access for the disability movement concerned social citizenship in which an individual was not linked solely to economic ideals of productive participation. The counter discourses attempted to disrupt the common sense nature of the job ready and capable ideology (Gramsci, 1977). By doing this, the counter discourses sought to reveal the ideology underpinning the disability income support policy. The following extract demonstrates the dialectical relations and ideological power of the language used in the job ready and capable discourses:

*by appearing to share in a disability rights agenda, welfare reform policy has managed to maintain an air of empowerment, while stripping away the protective*



*structure which, since 1908, has served to ensure that disabled Australians have received at least some level of income support in recognition of their additional needs.* (Cited in Galvin, 2004, p. 352)

Here, the ideological work of re-classifying disability into job ready and capable and aligning with empowerment discourses operated as a mechanism for preventing resistance from counter viewpoints (Gramsci, 1977). Hegemonic dominance of the Howard Government's disability income support policy and the suppression of resistance occurred through the process of connecting economic speak to the language of the disability rights movement and establishing authority (Gramsci, 1977).

The data revealed that re-categorising disability led to the mainstreaming of people with a disability. Thus, while people with a disability were viewed paternalistically as being included and job ready, they had no actual rights attached to determining the types and choice of jobs. Government policy discourse and parliamentary speeches operated in contradiction to the disability rights movement (Galvin, 2004). In effect, the policy language operated counter to the disability rights agenda and functioned to subsume the principles of social citizenship. The difficulty with the Government's notion of disability, was that re-classification onto Newstart Allowance reframed disability into an economic and charity concept, that is, disability job ready and capable. This ideological work of conservative policy language together with the new legality then perpetuated and reinforced traditional individual-functional and medical theories of disability. Consequently, the conservative paternalism operating together with Commonwealth authority led to the perpetuation and entrenchment of the ideology of disablism relative to disability income support.

### **iii. Ideology of disablism and disablist discourse**

In this epoch, the disability income support system reinforced disablism through its categorisation and separation of disability pensions from other payments (segregation) and "*creation of artificial distinctions*" (differences in day-to-day living costs experienced by all income support recipients). Three sub-themes were identified under the ideology of disablism theme:

- productive capacity and the able-bodied worker ideal: Ableness as a condition of citizenship;
- language of genuinely disabled and the disabled bludger construction; and
- disability pensioners responsible for their own plight.

#### **Productive capacity and the able-bodied worker ideal: Ableness as a condition of citizenship**

The able-bodied worker ideal and stringent eligibility criteria attached to the Disability Support Pension meant that people who would formerly have qualified for income support on

the basis of disability could no longer do so, and people who were not employable would no longer qualify. Thus, the assumption was one of “ableness” as a condition of citizenship (Chouinard & Crooks, 2005) which reflected the notion that people with a disability in receipt of disability income support are obliged to give something back to society (Galvin, 2004, p. 344). Similarly, the participation principle was reframed to relate to notions of productivity and “ability to work”, whereby disability was assessed, constructed and defined in terms of “work” ideals. Ideological distinctions were drawn between the so-called able-bodied and disabled in relation to work. This distinction between able-bodied and disabled attached notions of worth and value to work and productive capacity in relation to participation in the labour market (Gramsci, 1977). The distinctions consequently portrayed people with a disability reliant on disability income support as being unproductive citizens. This in turn generated assumptions that they are not valued in terms of social citizenship.

The policy practices and discourses reveal the way participation in Epoch Four was ideologically tied to mutual obligation requirements and productive capacity. Recipients of income support payments, including disability income support, were expected to contribute to society by participating in work for the dole schemes. Essentially they were expected to give back to society. For example, the use of productive capacity discourse was evident in the following extract of a policy speech by then Prime Minister J. Howard (1999b):

*Just as it is an ongoing responsibility of government to support those in genuine need, so also is it the case that ... those in receipt of such assistance should give something back to society in return, and in the process improve their own prospects for self-reliance. (p. 8)*

In this account, the basis of this argument centred on the hegemonic belief that productive contribution through work would result in the improvement disability income support and associated service delivery systems. The focus on the individual linked to the notions of employment and productivity is connected to capacity for independence, citizenship and a positive social status (Galvin, 2004; Gramsci, 1977). Adopting the productive citizen stance established connections between what constitutes a good citizen and economic ideals and highlighted distinctions between those assumed to have the capacity to work (able-bodied) and those perceived to be unable to participate in work (disabled) (Galvin, 2004; Gramsci, 1977). In taking this line of logic in policy responses and assuming some people are unable to work, the disability income support policy was disabling in nature. It also left open the possibility that those persons with a disability who were unable to work would have no safety net to prevent poverty; that is, it left them with no form of income support.

The underpinning message of the changes to disability income support policy was for people with a disability to transition to work. This hegemonic belief was demonstrated in the discursive frame: “*people who can work should work*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 45, Andrews). The theme of participation is also

indicated in the following extract by the then Minister for Employment and Workplace Relations, Andrews (2005b), who declared that:

*the basic policy parameters which we have, and that is that if a person is capable of working part-time, we believe that they should work.... But one major impact which is important in this regard is that the best form of welfare that we can provide someone is a job. (ABC, 2005b)*

These excerpts demonstrate the ideology that disability income support was no longer considered the appropriate safety net to mitigate the effects of poverty. Rather, disability income support was re-translated into productive capacity and the able-bodied worker ideal. The ideology suggested that people with a disability in receipt of disability income support, should be prepared to engage in work (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 40, Andrews). Institutional practices and the new legality perpetuated the means to transition people with a disability from welfare to work (Gramsci, 1977).

The productive capacity discourse was represented in the Government's approach to addressing unemployment and poverty through coercive means (mutual obligation) and economic fundamentalism. Consistent with other frames of the Howard Government discourses, the Newman (2000) policy document revealed that emphasising the ideal of increased productive capacity (economic and social participation) in relation to disability income support recipients, suggested that work became the means citizenship. This ideological construction is found in the discursive frame: "[productive capacity as a precondition for people with a disability to] *gain their fair share of the community's economic wellbeing*" (Cited in Newman, 2000, p. 9). The assumption suggested that individuals were solely responsible for their position and status in society, including the capacity to participate in employment. Thus, while the disability movement emphasised structural change and job-creation schemes, participation for the Howard Government reflected conditional participation in low waged or unpaid work and the labour market. The clear implication for people with a disability is that any job will do. An extract revealed that the dialectical relations of policy speeches/documents, media articles and policy practice leads to a focus on individual deficiencies as shown in the discursive frame: "*individual behavioural change*" (Cited in Galvin, 2004, p. 346) rather than changes to the social and structural conditions.

The idea that unemployment resulting from individual causes alone (able-bodied worker ideal) provided a coherent world view. In effect the productive capacity ideology and individual causes theory failed to acknowledge that unemployment is not only a consequence of capitalism, but the actual increase in income support recipient numbers derives from labour market policies, which have favoured economic gains, deregulation, fiscal austerity and downsizing over social objectives and full employment (Boreham et al., 1999; Henman & Perry, 2002; Langmore & Quiggin, 1994; Patrick, 2011; Stilwell, 1994,

2002; Swain, 2002; Wheelright, 1994). In an attempt to disrupt the dominant hegemony of productive capacity and individual failings, counter discourses made reference to the condition of the labour market as a contributor to unemployment. For example, the Galvin (2004) discourses indicated the way the Howard Government failed to account for the structural conditions of the labour market, as shown in the extract: *“there are not enough jobs to go around, and ... some people simply cannot work because of the nature of their illness or impairment”* (p. 351).

Similarly, the discursive frame: *“lack of meaningful work [available]”* was often used in the struggle to present an alternative world view to the dominant productive capacity ideal (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 19; Commonwealth of Australia, House of Representatives, February 14, 2006a; Commonwealth of Australia, House of Representatives, May 11, 2006b; Commonwealth of Australia, House of Representatives, May 22, 2006c; Commonwealth of Australia, Senate, March 27, 2006; Galvin, 2004; Mendes, 2005, 2008; Saunders, 2006, [SPRC]). It is important to point out that while, the unemployment rates at the time could be perceived as low, this had been at the expense of the displacement of full-time and once secure jobs (Tomlinson, 2006a).

Counter discourses contested the accepted ideology of productive capacity. The following extract reveals the productive capacity notion, and disabling nature of the policy language: *“expecting severely [and all] disabled people to be as productive as non-disabled people is one of the most oppressive aspects of capitalist society”* (Cited in Oliver, 2009, p. 123). The assumption underpinning this excerpt is that welfare changes required a new understanding of the ideal of work and the progression to a socially just society in which people with a disability are supported to participate and move off disability income support. Another excerpt indicates the conditional citizenship implication of the conditionality attached to disability income support: *“the tendency is to characterise all benefit claimants, including disabled people, as requiring ... conditionality to behave as ‘dutiful’ citizens and enter paid work”* (Cited in Patrick, 2011, p. 278). Here, the data reveals the disablement process in the way productive capacity and the able-bodied worker ideologies are preconditions for citizenship.

Subaltern (counter) challenges to the dominant ideology of ableness as a condition of citizenship were evident in the oppositional viewpoints. The counter challenges sought to reveal the lack of concrete evidence that shifting people with a disability onto Newstart Allowance results in greater opportunities for work. The next extract from a parliamentary speech was chosen as it represents a typical example of this theme from the data set. The extract challenges the validity of the Government’s claim about work requirements enhancing productive capacity and self-reliance:

*What makes this [welfare change] worse is that the Howard government has provided no clear evidence at all that punishing people in this way will actually*

*lead to greater rates of participation in the workplace.... It [Howard Government] does not bother to justify its legislation; it simply asserts that it is necessary, that the changes will be good for the nation or individual, and goes ahead.... We have not been given any evidence, let alone any Treasury analysis, of the productivity gains that the [Work Choices Bill] ... is supposed to deliver. (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 19, Dr Carmen Lawrence, Member for Fremantle, WA, Opposition, Australian Labor Party)*

In this account, the rhetorical devices and dialectical relations used by the Government to establish credence for their policy stance, when in reality no analysis substantiated the policy. The assumption was that there is full-employment and people with a disability have unrestricted access to the labour market without any functional and structural barriers. The contradiction emerging from the welfare changes was that there were no rights attached to deciding which types of jobs people with a disability want, nor was there any choice of jobs (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 27, Ripoll; Commonwealth of Australia, House of Representatives, June 23, 2005d, pp. 107-110; Commonwealth of Australia, House of Representatives, December 5, 2005e, pp. 78-79). In effect, the policy changes prevented the pursuit of higher or even adequate levels of income support for people with a disability. Additionally, for people with a disability, there was a reduced capacity to access and participate in the labour market, and their employability was limited because of a lack of access to education and employment opportunities. This is due, in part, to historically based segregated work environments, inaccessible work environments and lower wage rates.

Further, and as mentioned above, the policy provided little substantiation that such coercive measures actually led to increased participation in the labour market (See Commonwealth of Australia, House of Representatives, December 1, 2005b, pp. 46-47, Jenny Macklin, Member for Jagajaga, VIC, the then Deputy Leader of the Opposition, Australian Labor Party). Rather, the policy arguments posed by the Government centred on ideological distinctions through the re-classification of disability. The following extract demonstrates the counter discourse and social relations of ideology and power inherent in the Government policy. Andrew Bartlett (2005, Australian Democrats) questioned the legitimacy of the changes targeting the Disability Support Pension:

*Punishing disabled pensioners is re-badged as 'welfare reform', when in reality it is a total bastardisation of the McClure Report, which is usually cited as laying out the welfare reform framework which this Government said it would follow. If all of the other measures contained in this report had been implemented, (especially the need to reduce the gap between payments for pensioners and the unemployed) there might be a case for a more restrictive approach for a Disability Pension. However, as most of those involve the Government helping people in need before the better off, they have never been adopted. (Cited in Bartlett, 2005)*

In this account, less controlling alternatives to the disability income support policy changes had not been considered by the Government. The counter discourse seeks to expose the

ideologies underpinning the Howard Government approach to disability income support policy. However, even though counter challenges were proffered, the social conditions and maintenance element of the dominant discourse ensured the perpetuation of the productive capacity, able-bodied worker ideal and ableness as a condition of citizenship ideologies.

### **Language of genuinely disabled and the disabled bludger construction**

The ideology of disablism was revealed in the language of genuinely disabled and the disabled bludger construction. The central premise of the policy was the need for some form of incentive for people with a “genuine disability” to receive the appropriate benefit, as seen in the phrase: “*genuinely seeking the disability pension*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 52, McArthur, Liberal Party). Parliamentary and policy report discourses (such as Saunders, 2004b, p. 7, [CIS]) are replete with references to the genuinely disabled people construction. These assumptions led to stigmatising people with a disability reliant on disability income support, as shown in the following discursive frame from a parliamentary speech: “*I ... commence ... by expressing ... sadness at the stereotyping by members [of the Howard Government] on the other side of this House ... [that is] stereotyping people with a disability [and] ... the total lack of understanding of disability*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, pp. 52-53, Jill Hall, Member for Shortland, NSW, Opposition Australian Labor Party). The speech later included the frame: “[the members are involved in] ... *denigrating [the] level of disability*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 53, Jill Hall, Member for Shortland, NSW, Opposition Australian Labor Party). The following extract demonstrates the hegemonic interaction between ideology and stereotyping. Hall, Opposition Australian Labor Party (2005b), commented that prevailing beliefs and stereotypes demonstrated a limited understanding of disability conceptualisations:

*To say that a person just ticks a box and is put on a disability support pension is totally incorrect. A person is assessed and to be eligible for a disability support pension your disability level has to be 20 per cent of the whole body—not just 20 per cent loss of function in your back but 20 per cent of the whole body.* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 53, Hall)

These illustrations revealed that in Epoch Four, the disability income support policies ideologically maintained the link to employment and functioning in the labour market, for example through employment participation schemes, that is, mutual obligation requirements (Castles, 2001; Roulstone, 2000; Russell, 2001a; Stretton, 1996; C. Thomas, 1999; Ziguras, Duffy & Considine, 2003). The discursive theme underpinning the welfare changes led to stigmatising people with a disability reliant on disability income support.

Another counter discourse highlighted the implications of constructions such as the disabled bludger and genuinely disabled:

[The policy language was] *likely to oppress them* [people with a disability] *by expecting them to be like able-bodied workers without addressing the social and institutional basis of disablement. This is because the proposals are structured through myths seemingly handed down through generations of policy making in the Poor Law tradition, rather than through the lived realities of ... disabled claimants.* (Cited in Grover & Piggott, 2007, pp. 743-744)

Here, the consequence of the welfare changes as a policy measure was the perpetuation of oppression in relation to disability income support and the disability concept. In the above account, the social model of disability, in rejecting economic fundamentalist based policies of disability income support, contended that the concept of disability is tied to capitalism. Disability studies are underpinned by values, which emphasised the importance of acknowledging the link between historical understandings and contemporary conceptualisations of disability and work, rather than deficit and charity models which promoted disabled bludger constructions. Indeed, the disabled bludger construction is reflective of the English Poor Laws of the 1800s which defined people in terms of their capacity to participate in the labour market.

Other counter discourses by disability social theorists (such as Barnes & Mercer, 2003; Charlton, 2006; Oliver, 2009; Prideaux et al., 2009; Priestley, Jolly, Pearson, Riddell, Barnes & Mercer, 2006-7; Schneider, 2005) cautioned against cementing the connection between productivity and citizenship, given the propensity for stigmatising effects of disability income support. The emphasis on abled and disabled distinctions reflected the dominant traditional individual-functional, medical and charity theories models that are highly disabling. These theories underlying disability income support in part portrayed people with a disability somewhat flawed or deficient, thus perpetuating disablism (Schneider, 2005). The re-translation and perpetuation of distinctions contributed to the genuinely disabled and disabled bludger constructions.

### **Disability pensioners responsible for their own plight**

The disablist discourse apparent in Epoch Four contained assumptions that people with a disability who were reliant on disability income support contributed to their own situation, including experiences of social and economic hardship. From the Government policy standpoint, any failure to obtain employment centred on individual failings, rather than structural barriers. The policy position drew on psycho-behavioural and psychosocial theories to support the Government definition of poverty as a consequence of individual dysfunctions, intergenerational factors, and individual failures in securing employment.<sup>36</sup> If an

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<sup>36</sup> The Howard Government based their assertions of individual behaviour contributing to poverty on the findings of the Centre for Independent Studies (Right-wing Think Tank) study entitled "Behavioural poverty". Sullivan ([CIS], cited in Thornton, 2000) argued "*the poor are poor [and welfare dependent] because they can't control their behaviour and the State, which provides the welfare cash, should question their moral right to it*" (n.p).

individual, particularly an individual with a disability, was poor, unemployed or reliant on income support, then the individual was at fault, and thus responsible for his or her own “plight” (Abbott, cited in Marris, 2001; Brough, 2001; Saunders, 2007a, 2007b, [CIS]). Connections between joblessness and poverty were generated.

The following excerpt by the then Minister Andrews (2005b) demonstrated the forming of connections between unemployment and poverty, coupled with assumptions of malingering and idleness. In a policy speech, he maintained the new requirements prevented welfare dependency, as demonstrated in this extract: “[in order to prevent] *a sedentary existence on welfare ... [the new requirement] addresses the very real problem of intergenerational poverty. There is widespread agreement in the literature that the principal cause of poverty is joblessness*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 39, Andrews). The concept of plight used in Epoch Four was different to that in Epoch One. In Epoch One, the plight of the invalid was met with paternalistic concern to support people with a disability and provide a disability pension, whereas in Epoch Four, the idea of plight was connected to individual self-reliance and dysfunctional behaviour that leads to reliance on disability income support. As a discursive formation, the disability pensioners being responsible for their own plight construction tied to Commonwealth authority and conservative paternalism represents an ideological mobilisation. In this sense, the ideology of disablism rhetoric have been identified with and in turn internalised in such a way as to present as natural and somehow inevitable (Gramsci, 1977, 1996). In opposition to the assumptions underpinning the individual contributing to their own plight discourse, McKay (2005) pointed out that the policy emphasis on plight and individual-contributed poverty led to the erosion of rights for people reliant on disability income support. Further, the government strategy incorporated re-education of the broader population to secure legitimacy for the policy approach (Gramsci, 1977). Hence, the rhetoric of individual-contributed poverty was pursued in the media.

Media became a powerful hegemonic tool for entrenching the ideology of disability income support idleness. For example, the influence of this rhetoric can be identified in media articles citing ministerial speeches and commentary. One such example was the statement that: “*individual actions contribut[e] to poverty*” (Abbott, cited in Marris, 2001; ABC, 2002a; Brough, 2001). Follow-up articles followed the individual victim-blaming theme. For example, “*unemployment, and not low pay, is the chief cause of poverty*” (Abbott, cited in Marris, 2001; ABC, 2001; Brough, 2001), and “*if we are interested in eliminating poverty or doing our best to eliminate poverty, the best thing we can do is boost employment*” (ABC, 2002a). Counter discourses such as Engels (2006) revealed the dialectical relations between the Government policy, rhetoric and media in framing the argument for welfare changes and individual causes of poverty theory as demonstrated in this extract: “*the government’s campaign was aided by a conservative reporting media*” (Cited in Engels, 2006, p. 10). In another frame, the



consequence of the ideology is made explicit: *“such uncritical media reporting proved vital to shifting public understanding and support for the government’s radical social reform agenda”* (Cited in Engels, 2006, p. 10). In this account, the hegemonic-creation of the disability pensioners responsible for their plight construction is brought to the foreground. The discursive frame also highlights the way the ideology is uncritically accepted by the general population to secure dominance and alliance (Gramsci, 1977).

During Epoch Four, alternative viewpoints attempted to gain legitimacy in the struggle against the dominant ideology of plight. For example, counter discourses from disability social theorists and alternative policy commentators such as Michael Raper ([ACOSS]) indicated that structural issues were related to poverty and low levels of unemployment as shown in this excerpt: *“the greatest cause of poverty is that there are not enough jobs and that many social security payments are paid at a level below the poverty line”* (Cited in Thornton, 2000). In another extract countering the government policy, Judy Moylan (2005b, Member for Pearce, WA, Liberal Party), noted that the changes to disability income support contained undesirable consequences for people with a disability (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 13, Moylan). A counter discourse by Peter Andren (2005b, Member for Calare, NSW, Independent) revealed the illusion of fairness: *“as a nation we have failed those tests [to provide real work opportunities]. The mirage in these bills is ... that they represent a fair transition to work. They do not”* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 13, Andren). Both speakers point to the heightened consequences of poverty for people with a disability reliant on disability income support.

A key theme in the data centred on the notion that tighter eligibility requirements and mutual obligation initiatives, plus the propensity to shift people with a disability onto Newstart Allowance, adversely affect income levels. Where the Disability Support Pension is not subject to income tax, Newstart Allowance is a taxable payment and subject to stringent income and assets tests, together with the work activity requirements (Australia Senate, 2005; A. Harding et al., 2005a, 2005b). Independent analyses (for example, NATSEM Reports, A. Harding et al., 2005a, 2005b) indicated discrepancies between the Disability Support Pension and Newstart Allowance payment rates. Of significance was the following finding from the data: *“[people with a disability] could be up to \$122 per week worse off by moving into work under these changes than if they moved into work under the current arrangements”* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 27, Ripoll; Commonwealth of Australia, House of Representatives, February 14, 2006a, pp. 169-212; Commonwealth of Australia, House of Representatives, May 11, 2006b, pp. 61-120; Commonwealth of Australia, House of Representatives, May 22, 2006c, pp. 103-126; A. Harding et al., 2005a, 2005b). This amount represented a loss of one-quarter of the fortnightly pension. The discrepancy, the reports suggested, were due in part to the differing

income tests or “cut out points” between the Disability Support Pension and Newstart Allowance (ACOSS, 2005a, 2005b; Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 27, Ripoll; Commonwealth of Australia, House of Representatives, May 22, 2006c; A. Harding et al., 2005a). They similarly revealed that transferring people with a disability to Newstart Allowance failed to account for the related medical and social support costs incurred by people with a disability or the sporadic nature of some disabilities, for example, psychiatric disability (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 36, Hoare; Phelps, 2000).

The ideology of disablism reflected in the notion that people with a disability reliant on disability income support are somehow responsible fails to consider the poverty implications. This is evident in the extract: “*living at low levels of subsistence is an unfortunate reality for many ‘people with disabilities’*” (Cited in Gibilisco, 2003, pp. 132-133). Hence, for people with a disability there was a propensity for a substantial degree of increased economic hardship, particularly with additional barriers to finding employment and the costs associated with impairment. This policy consequence was demonstrated in the following Hansard extract:

*That is the real tragedy. People trying to do the right thing are still facing a cut to payments, no matter what they try to do. The Howard government has estimated that about 100,000 people should be able to gain work out of these changes, but there is no evidence that they actually will. Where are these jobs going to be found?* (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 25, Ripoll)

The implications of the policy change were quantified by counter viewpoints such as ACOSS (2006) who reported that the unemployment rate for people with a disability was 8.6 per cent, in comparison to 5 per cent of people who do not have a disability. Peak bodies and advocacy groups such as ACOSS (2006) and the Brotherhood of St Laurence (2007) found that the income rates for people with a disability were significantly lower than for people who identified as not having a disability. As Ripoll (2005b), in a parliamentary speech proclaimed, “*it is a very unfair and unjust piece of legislation and, if we take into account just how many people will lose out, it is quite extraordinary*” (Commonwealth of Australia, House of Representatives, December 1, 2005b, p. 25, Ripoll). Here, Ripoll reminds his audience and the general community that the welfare changes and government policies reflect unjust policies, rather than policies based on social justice and fairness.

In another extract, disability social theorist Gibilisco (2005) alludes to the implications of the Government policy practice and discourse:

*Social Security benefits for people with disabilities who live on their own and provide for themselves will, if managed correctly, barely allow them to live beyond levels of subsistence. The disabled pension is one quarter of the minimum wage. But many individuals living on a disability pension have abnormal costs.* (p. 139)

Given these findings, and the discrepancies across income support payments, the disability pension does not provide an adequate standard of living, as suggested by some social policy commentators, such as Saunders (2004, 2005a, 2005b, [CIS]). These ideologically imbued misconceptions failed to recognise that people with a disability, under the current form of capitalist society, need some form of income support to exist, as pointed out by disability social theorists, such as Barnes (2002), Barnes and Mercer (2003), Beresford (1996), Clear and Gleeson (2002), Gleeson (1998) and Gibilisco (2003, 2005).

Although some suggestion was made by the Government to include the Blind Pension in the welfare changes to the Disability Support Pension, the Government pulled back from this objective. Perhaps public sentiment in support of Blind Pensioners was so strong at the time, that the Government did a back flip on targeting the Blind Pension. Regardless, the differential treatment between Blind Pension and the Disability Support Pension remains, generating hierarchies in levels of impairment and privileging one pension at the expense of another.

#### **Epoch Four Summary**

Significantly in Epoch Four, the extracts and perception that people with a disability were bludgers on the system evolved further and gained momentum in the public sphere. Commonwealth authority was reflected in the broader political context of targeting disability income support policy and the regulated citizen notion where the Government attempted to “break the shackles of [presumed] welfare dependency” by tightening eligibility requirements (partial capacity to work). Compliance and regulation of people with a disability receiving disability income support occurred through the introduction of welfare-to-work requirements which contributed to increased costs and complexity associated with administering the mutual obligation initiatives. Conservative paternalism discourse focused on the sub-themes of genuinely worthy of a disability pension with the moral condition of disability income support as an earned right. The approach adopted by the Government led to the changing notion of a “fair go” to the “having a go” which was reframed genuinely looking for work and reclassified disability in terms of being job ready and capable. The ideology of disablism emphasised the productive capacity and the able-bodied worker ideal prevalent in the ideology underpinning the welfare changes to disability income support. The persuasiveness of the ideology driven by the Government shaped and influenced public perception, hence the emergence of the disabled bludger construction. In effect, the increased focus on the Disability Support Pension and targeting of so-called disabled bludgers led to greater stigmatisation of people with a disability. The construction of disability in terms of productive capacity, meant that ableness became a condition for citizenship. This disablist ideology permeated the Australian disability income system.

## **5.4 Chapter Conclusion: Bringing Together the Themes from Chapter Four and Chapter Five**

Chapters Four and Five outlined the findings from the data. Chapter Four reported on Epochs One and Two. Chapter Five detailed findings relevant to Epochs Three and Four. This section brings together the key insights emerging from the data to discuss the relevance of the findings in relation to the Australian disability income support system. The analysis across the four epochs has shown that Commonwealth authority and conservative paternalism has been endemic through the system of the Australian disability income support, from its inception until the current manifestation. The ideologies of Commonwealth authority and conservative paternalism have perpetuated and entrenched disablism. Oppressive constructions of people reliant on disability income support have harmful effects in the form of a greater propensity for poverty and vulnerability. While Commonwealth authority and conservative paternalism contained similar features across each epoch, each has been expressed in different ways and taken on differing forms. In the early epochs, Commonwealth authority manifested in the regulation of people with a disability through the central eligibility requirement of permanently incapacitated for work. This requirement generated the un/productive invalid citizen dichotomy, which established connections between disability, needy citizen conceptions and productivity. Although in some epochs the idea of a “fair go” was used to promote social justice for people with a disability, this was often juxtaposed with the Government in power securing unquestionable authority. There existed an inherent tension between the belief that some form of work incentive needed to be included in disability income support policy responses given that the disability income support system was perceived by Governments as a disincentive to work.

In the latter epochs, Commonwealth authority was identified in the increased emphasis on penalties for any non-compliance with the requirements. Where tighter targeting of disability income support occurred in later epochs, particularly Epoch Four, the result was an increased regulation of the “disabled citizen”. In Epochs Three and Four, this regulation of “disabled citizens” was inherently different from previous epochs. Commonwealth authority was tied to economic policy and ideals of productivity whereby the income support system under the welfare state merely became an extension of Australian capitalism (Broomhill, 2001; Jessop, 2001). This re-structuring of Australian capitalism and Commonwealth authority was found in the disability income support policy changes which promoted economic policies over “redistributive welfare rights” (Broomhill, 2001; Jessop, 2001). Government intervention was considered an appropriate strategy for addressing the presumed problems of welfare dependency. Emerging from the analysis was the consideration that the Australian targeted disability income support system for people with a disability was highly complex and cost inefficient.

The analysis has demonstrated the way in which conservative paternalism permeated all four epochs. During the early epochs, conservative paternalism was related to the idea of disability income support as a form of “charitable dole”. The Invalid Pension was not considered an assumed right; therefore, there was a moral right attached to the Invalid Pension in which claimants needed to “be deserving of a pension”. This idea of deserving of a pension derived from the conservative mistrust shown by the Governments in the provision of disability income support, particularly in the concern for idleness and the burden of dependence. In later epochs, particularly Epochs Three and Four, conservative paternalism was identified in the disablist language and “moralizing discourse” where the Government sought to prevent the dependency of perceived disabled “habitual malingerers”. In effect, conservative paternalism discourse reified dysfunctions, which reflected individual-functional, medical and charity theories of disability (for example, new medicalised criteria in Epoch Three). Conservative paternalism in Epoch Four manifested itself in terms of being genuinely worthy of a pension with a moral condition attached in which disability income support was seen as an “earned right”. People with a disability were expected to “have a go” by contributing to society in a productive manner, including obtaining employment. This meant that disability was reclassified into being job ready and capable.

The detailed analysis has found that the dynamic interaction between Commonwealth authority and conservative paternalism perpetuates and entrenches disablism. The analysis demonstrated that the Australian income support system for people with a disability reinforces disablism through the differentiation of disability income support pensions from other payments. Disability income support policy perpetuated the categorisation of people with a disability, based on the deficit model. Further, disabling practices and discourses, such as, tightening eligibility requirements perpetuated the assumptions of “ableness” as a condition of citizenship. This ableist conditional citizenship was found in the language of plight of invalidism, needy citizen, and non-productive citizen. Disability was conceptualised as somewhat of a burden on society, thus perpetuating the disabled bludger inference and the assumption that disability income support will only be provided to the genuinely disabled. In the earlier epochs, the concept of plight was linked to a paternalistic concern for disability income support provision to people with a disability, whereas in later manifestations, such as Epochs Three and Four, the notion of plight was associated with reliance on disability income support. In Epochs Three and Four, reliance on disability income support was attached to concern for idleness and malingering. The connection between reliance, idleness and productivity legitimised the policy push for increasing incentives and fostering greater individual self-reliance (Jessop, 2001, 2004, 2007). The idea of individual self-reliance is in stark contrast to the social theory of disability, which promotes interdependence and social citizenship.

Disability income support policies generate able-bodied and disabled distinctions creating a dichotomy akin to the deserving and undeserving poor distinctions. Standing (2004) added that this disablist tendency leads to categorisation as conventional wisdom in the provision of income support to people with a disability which classifies people in terms of being able to work and unable to work (Standing, 2004, p. 97). The call for continuing to assess against medical criteria for disability pension eligibility (such as Humpage, 2007) emphasises the pre-eminence of the individual-functional, medical and charity models. The current thinking around disability income support suggests that it is inevitable to use some form of medical assessment for disability income support eligibility. In reality, there is a need to address the ideology of disablism pervasive in the Australian disability income support system. In all, the analysis also calls for conceptualising disability income support in a different way.

### **Final comment**

Across the four epochs, disablism has perpetuated exclusionary practices and the non-citizenship of people with a disability receiving disability income support. The Australian disability income support system over time was found to have generated notions of *ableness* as a condition of citizenship. The analysis has demonstrated the need for a socially just income support system that moves away from Commonwealth authority and conservative paternalism and moves towards a system that promotes non-disabling principles to improve the social citizenship of people with a disability. The challenge for future policy-making is developing an income support system for people with a disability that enhances social justice, rather than an income support system based on disablist principles, regulation and punishment. Given the close connection between the Australian welfare state and the Australian capitalist system, there needs to be a consideration of the social element in redistributive welfare policies, rather than the solely economic policies regulating the behaviour of people with a disability in receipt of disability income support. Broomhill (2001), Jessop (2001) and Polanyi (1945, 1957) argued that a social justice approach to disability income support was critical to counter the effects of the dominant regulatory and economic models of income support.

The influence of the policy shifts across the epochs, including increased Commonwealth authority and conservative paternalism discourse, perpetuated a highly regulated income support framework underpinned by discursive formations and economic, political and institutional arrangements which in turn entrenched disabling income support policies. Disabling income support policies are counter to the aims of disability social theories which promote the rights of people with a disability (such as Gibilisco, 2003 and Oliver, 2009). In maintaining consistency with disability social theorists and the findings of this study, there is a need for an ideologically sound alternative based on non-disablist principles.

Chapter Six outlines the relevance of the alternative model, the Basic Income proposal. Chapter Seven provides an alternative policy trajectory to the dominant Australian disability income support system. The alternative model of Basic Income is put forward as a sound contrasting model for examination. Chapter Seven explores the extent to which the Basic Income as an alternative model could promote the social citizenship of people with a disability.





## **PART TWO**

### **THE POTENTIAL FOR A “BETTER WAY”? EXPLORING THE BASIC INCOME PROPOSAL**



## CHAPTER SIX

### ***Setting the Scene. Social Justice and the Basic Income Model:***

### **Emerging Insights and the Relevance of the Model for Comparative Analysis**

All in all ... it takes more than criticism to replace a paradigm – it takes an alternative to do that, an alternative model capable of addressing the questions being posed when the prevailing paradigm cannot do so. (Standing, 2002, p. 163)

#### **6.1 Introduction**

The previous chapters (Chapters Four and Five) examined the Australian disability income support system from 1908 to 20007. Emerging from the analysis was the way the Australian disability income support system was disabling in nature through the entrenchment of Commonwealth authority and conservative paternalism discourse which perpetuated the ideology of disablism. The analysis also revealed the way in which discursive formations perpetuated disablist principles and underpinned disability income support policy. The analysis showed how the Australian disability income support system treated people with a disability. The analysis exemplified that the construction of the “invalid citizen” and “disabled bludger” discourses were a recurrent theme found in Parliamentary Hansard speeches and media articles, albeit in different manifestations across the epochs. The framing of people with a disability in receipt of disability income support as potential malingers or idle has been a significant feature of the Australian disability income support system since its inception.

With the Australian disability income support system being so strongly underpinned by disablist principles and discourses in conjunction with being situated in the Australian capitalist economy, it is clear an alternative model grounded in social justice requires examination (Broomhill, 2001). Consequently, an aim emerging from the present study was to explore the extent to which an alternative model promotes the social citizenship of people with a disability. Exploring way people with a disability are treated within the Australian welfare system is important. Of interest here is the notion of social justice in relation to the redistribution argument. The researcher acknowledges the debates surrounding different forms of distribution (such as those detailed in Chapter Six); however in this thesis, redistributive justice is applied as a heuristic device to scaffold ideas and build an interface between historical materialism and the discursive qualities of disability income support policy. This positioning of a redistributive justice was important in terms of selecting and applying an alternative model.

The Basic Income model represented an appropriate model for comparison given its grounding in redistributive justice. Prior to reporting on the findings from the critical examination of the Basic Income model, this chapter briefly reviews the relevant literature on the Basic Income model. It examines the relevance of Basic Income as an alternative model to targeted disability income support models. This chapter briefly traces fundamental tenets underpinning a Basic Income model of income support, including current developments both in Australia and internationally.

The rationale underpinning the examination of a Basic Income model as an alternative model for comparison with the current Australian disability income support system was in part outlined in the preceding chapters, most notably, the Chapter Three. Yet, in reality, the reasons for examining an alternative such as the Basic Income are far more complex than can be expressed within a thesis. The central assumptions underpinning the approach include the idea that any emphasis on disability income support is underpinned by the concern for an alternative to the current Australian disability income support system.

This chapter also critically examines the historical basis of Basic Income alternatives, such as guaranteed minimum incomes proposed by Milner (1920), and it positions the model's relevance as a useful comparison with the Australian disability income support system. The approach involves exploring the rationale underpinning the choice of Basic Income model as compared with other possible alternatives, such as the "right to work" or "learning or earning" approaches. The proposals for a guaranteed minimum income within Australia are explored. A brief revisiting of the methodological framework sets the scene for analysis.

### **"For us the living: A comedy of customs". Basic Income, a critical alternative or science fiction?**

Prior to detailing the Basic Income literature, a brief outline of Heinlein (2004)<sup>37</sup> science fiction work entitled, *"For us the living: A comedy of customs"* is provided because of its reference to a social dividend (universal grant). While this chapter is not a literary exploration of the works of Heinlein (2004), the central themes underpinning his text are of relevance here. These themes centre on social citizenship and social justice. In this excerpt, Heinlein writes of an exchange between the central characters: Perry and Master Davis. The discussion centres on early justifications for and against Basic Income through the concept of a "dividend or inheritance check":

*"As to what is bothering me, I believe I understand the present financial system and I see that it works more smoothly than the one in my day, but there are still things about it that I can't see the justification for. Especially this dividend or inheritance check. Why in the world should everybody in the country be handed*

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<sup>37</sup> Heinlein, Robert. A. (2004, written 1938-1939). *For us, the living: A comedy of customs*. Excerpt from Chapter 10, which provided a justification of the Basic Income grant. Heinlein used the terms "social dividend or inheritance check" and "a blanket dividend for ones inheritance".

*money to spend whether they work or not? I concede that it is all right for widows and orphans, the sick and the blind and crippled [sic], but why support in idleness some big overgrown lunk who is too lazy to support himself [sic]? Why put a premium on laziness? Here is my idea: let's increase the discount if necessary, and give a big dividend to those who need it but can't support themselves, but if a drone won't work, let him starve. Don't let him live off the rest of us."* (Perry)

*"I see your point. It irks you to see anyone at all who is able to work permitted to live without working. But why do you consider work a virtue?"* (Master Davis)

*"Well, these idle persons use up goods that the workers might otherwise enjoy."* (Perry) (Heinlein, circa 1938-1939, 2004, p. 188)

Here, Heinlein (2004) explores the notion of a universal scheme in the form of a "dividend or inheritance check" or more precisely "a blanket dividend" for one's inheritance. In his text, Heinlein is referring to a universal Basic Income. Heinlein captures the essence of the ideological tensions between targeted and universal positions of income support policy. He does this by replicating contentious issues concerning the right to a Basic Income, where the concern for idleness, the need for incentives and productivity overshadow the socially just imperatives.

In a similar vein to Heinlein (2004), social policy analysts, academics and politicians (such as Cowling, Mitchell & M. Watts, 2003; R. Watts, 1996) have long argued the merits of particular income distribution systems and the role of the welfare state. These debates tended to be framed in terms of highly targeted approaches versus universal models of income distribution. Analyses further tended to place greater importance on resolving disagreements about economic imperatives (such as cost-benefit analyses) at the expense of social dimensions, such as preventing discrimination. Universal models of income support, such as the Basic Income, have often been discounted on the grounds of ideological inappropriateness. Yet opponents of universal income support schemes often couch their opposition in terms of feasibility and cost. In order to set the scene for the comparison dimension analysis between the two models of income support, the next section briefly traces the disability dimension in relation to Basic Income support model debates.

## **6.2 The Basic Income Alternative**

In order to draw these premises out further, an overview of the key principles and features of Basic Income are provided. Basic Income is the term consistently applied throughout the study. However, it is important to note that other conceptualisations have been used historically: for example, guaranteed minimum income. A Basic Income grant is in principle a provision for all citizens, however it is somewhat governed and defined by the geographic and national boundaries of particular countries. The tensions underpinning debates surrounding distinctions between regional, global, national and regional forms of Basic Income and whether the associated rights should be reflected at the national or global level

is the subject of debates within Basic Income literature, for example, M. Howard's (2006) article "Basic Income and Migration Policy: A Moral Dilemma?" A Basic Income is basic in the sense that it is designed to provide a basic standard of living through the provision of a payment set at a modest rate. The notion of income is applied in a straightforward way to reflect regular and ongoing fortnightly cash payments made to individuals via the Commonwealth, similar to current arrangements. The grant is paid to individuals, rather than family units (Standing, 2004).

Theoretical analyses in support of Basic Income, such as Baker (1992) and Van Parijs (1996, 2000, 2007), recognised that the approach constitutes a relevant alternative to traditional targeted income support systems, for contemporary society. Barry (1992) and Offe (1992) initially suggested that people should not be forced to subsidise "voluntary unemployment" if so-called unemployed people failed to provide a productive contribution to society. However, Barry (1994, 1996, 1997, 2000, 2005) and Offe (2004, 2008) subsequently repositioned their arguments in favour of the Basic Income proposal. Thus, the Basic Income debate represents a dynamic and evolving model with some theorists, such as Barry (2005), later arguing for a Basic Income citing its relevance to developing a just society.

Although somewhat supportive of a Basic Income, Phelps (2000) rejected Van Parijs' (1996, 2000, 2001) claims for a universal grant and proposed a low-wage employment subsidy as a means for ensuring people remain productive and linked to employment. Similar positions are taken by participation income supporters, such as A. Atkinson (1996). These assumptions are counter to the principle of Basic Income as a universal right in its purest form, as they tend to rely on incentives and connections to productive citizenship.

Standing's (2005a) theoretical analysis explored the concepts of work and labour, and questions the construct "right to work", labelling the concept highly deterministic. Standing identified that the right to work argument advanced by Harvey (2004) generated narrow conceptualisations of the term "work" and ignored the potential for the pursuit of an occupation. For Standing (2005a), these narrow conceptualisations generate dualisms in which conventional wisdom is upheld in policy provisions of income support. This notion is traditionally rejected by Basic Income advocates (Standing, 2005a). Issues of contribution to society are often raised in critiques of Basic Income (such as A. Atkinson, 1996; and Harvey, 2004). The research on Basic Income (including Rankin, 1991, 1998; Raventós, 2007; Standing, 2002, 2011; Van Parijs, 2001) demonstrated that people who are in receipt of a Basic Income grant did not in effect work less; rather, the grant freed people to pursue occupations or professional work opportunities.

Noguera (2005) adopted a similar position to Standing's (2005a), by arguing for the separation of the concepts of income support from employment when advancing Basic

Income approaches. Critical to Noguera's stance is the acknowledgement that civil and political rights are "unconditionally granted in every democratic state as a basic part of citizenship" (p. 2). Nonetheless, he further identified that the institutional arrangements within society, as in the welfare state, guaranteed these rights solely on the basis of conditionality and participation in the labour market. The issue for Noguera is that transitioning to a Basic Income requires strategic planning to ensure it is introduced as an unconditional citizenship right.

While advocates of the Basic Income proposal uphold the need for the grant as an alternative to targeted income support systems, current debates (such as Raventós, 2007) continue to situate the argument within the capitalist political economy/society in which notions of productivity and incentives dominate. That is, the idea centres on the consideration of redistribution within the existing income support system, rather than on broader structural changes. This premise raises the issue of the difficulties associated with the disability income support system that is in place now, as well as the question of "what type of society do we want?" If some form of Basic Income is needed, and the model is implemented, would it then be reduced to targeted measures over time, particularly where ideological dimensions (such as conservative paternalism and categorisation of people with a disability) are not challenged or replaced? Considerations such as this are critical to the thesis, especially examining the complexities associated with the transition to non-disabling forms of income support for people with a disability. As Natrass (2006) affirmed, the politics within a single nation will determine the way a Basic Income is implemented.

### **6.3 The Treatment of the Disability Dimension and Basic Income in Income Support Policy Debates**

Little attention has been drawn to disability and its consequences in social policy income support literature. Even within the study of Basic Income, the disability construct tends to be treated as a separate object of inquiry. Standing (2005a), an advocate of Basic Income, similarly notes this contention and argues for examining disability dimensions in Basic Income debates. The difficulty is that not only is little attention has been paid to the disability dimension in Basic Income literature but, moreover, it is often met with much resistance. The issue of disability is often seen to belong to the realm of disability employment studies, rather than as a structural dimension of inequality. For example, an increased level of interest has been generated in relation to gender analysis, feminism and Basic Income proposals.<sup>38</sup> Yet, the disability dimension tends to remain underexplored. Different proponents and critics of Basic Income can reinforce disablist notions by asserting that disability issues need to be

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<sup>38</sup> Numerous analyses and discussions on gender implications relevant to Basic Income proposals can be evidenced. For example, Baker (2008), Bergmann (2008), Elgarte (2008), Gheaus (2008), O'Reilly (2008), Raventós (2007), Robeyns (2008) and Zellele (2008). Indeed, a special issue of Basic Income Studies (2008) was dedicated to the issues of gender, feminism and Basic Income.

researched elsewhere. Another example is disability policy writers (such as Barnes and Mercer, 2005; Roulstone, 2000; Thornton, 2005; Wehman, Revell & Brooke, 2003) examining the issues of employment policy, labour market exclusion and disability issues as distinct from income support model policy considerations.

Other disability policy theorists, such as Grover and Piggott (2007), and Humpage (2007), critically examined disability income support systems using the social model as a basis for analysis, yet these writers propose no alternative model for implementation. Indeed, global comparisons of disability income support have been undertaken (for example, Dixon & Hyde, 2000). However, rather than explore the relevance of alternative universal grants, these analyses tend to document broader patterns of income support within the context of traditional targeted income support models. Vedeler (2009) explores the Norwegian disability income support policy in terms of the disability pension functioning as a barrier to employment. Vedeler details a small qualitative study that used the in-depth interview method as a means to examine various obstacles in the transition to work experienced by people with a disability in receipt of the disability pension. Similar to other disability and social policy theorists, the focus for Vedeler was contained within the traditional approach to income support and employment policy with no attention drawn to an alternative, such as a Basic Income proposal.

Perhaps most notably, Barnes and Mercer (2005) did point to the idea of a Basic Income by exploring the work of Gorz (1999) who advocated for the universal grant and the “European model for the post-work society” (p. 540). Barnes and Mercer perceived Gorz’s (1999) argument to be in alignment with the disability movement’s struggles for social citizenship based on historical factors of segregation and marginalisation. Yet, Barnes and Mercer somewhat paradoxically reject the notion of a Basic Income grant. They believe that the Basic Income proposal has strength in reconceptualising the notion of labour, yet disability dimensions are not considered. Barnes and Mercer qualify this by asserting:

The marginalization of disabled people from the labour market has certainly been a major factor in their exclusion over the last two centuries, and will remain a focus for political campaigns. Nevertheless, promotion of the right of people with impairments to exist in society on a par with their non-disabled peers requires a challenge to prevailing analyses of work, welfare, and disability. (p. 541)

For Barnes and Mercer (2005) greater emphasis needs to be directed to social change for people with a disability inclusive of disability social theory in the areas of employment policy. However, these disability writers fall short of exploring the conceptual realm of Basic Income as an alternative model for disability income support. An important point emerges from their discussion. For an alternative model of income support, such as the Basic Income proposal, to be truly inclusive, consideration needs to be given to the disability dimension and the implications surrounding the disabling effects of disability income support and employment policy. These disability policy analyses demonstrate the paucity of disability studies which



examine an alternative vision for disability income support. Further, the few explorations on the implications of the disability dimension in disability income support policy analyses pointed to the need to examine the disability concept in relation to an alternative model, that is, Basic Income.

Similarly, some Basic Income commentators (A. Atkinson, 1996; Harvey, 2004) continue to argue for a Basic Income, Negative Income Tax or Participation Income based on premises of “abled versus disabled” distinctions. In part, the researcher’s approach is informed by feedback received from the frustrating process of submitting journal manuscripts and attending conferences, where limited interest in disability dimensions relative to Basic Income has been shown. Where some acknowledgment is made by Basic Income proponents, the researcher has been directed to discipline areas considered more suitable, such as disability studies.

Of most concern is the propensity for some intellectuals, social policy analysts and activists to reify old arguments concerning the disability concept and push disability issues to the background. In these instances, arguments advancing the need for the separate treatment of disability are pursued. Yet, this treatment contradicts the central tenets of Basic Income, which proposes a basic provision to all citizens. This thesis argues that any proposal founded on socially just premises needs to be for all people, not just one “able-bodied” group. If the disability construct continues to be maintained as a side issue, then the debates tend to be contained within traditional social policy responses. Not only is this profound in advancing Basic Income understandings, but also in redressing the propensity for abled/disabled dichotomies in Basic Income and other related income support literature.

### **Heinlein (2004) and the deserving poor rhetoric**

To return to Heinlein’s (2004) narration of the conversation between Perry and Master Davis, the two central characters follow the same theme of the right to work, productive contribution and principles of universal schemes:

*“To refuse your brother [sic] who prefers not to work his [sic] share of production for moralistic reasons of your own devising is to claim for yourself that which you have not earned and have no right to.” (Master Davis)*

*“Granting what you say is true – it is, I suppose – nevertheless it takes labor to apply this heritage of technical knowledge. Why shouldn’t every able-bodied man [sic] have to contribute equally to that labor?” (Perry)*

*“But surely, Perry, you can see that there is not enough drudgery in this world to go around....Tell me, have you seen very many idle people?” (Master Davis)*

*“No, I haven’t as yet.” (Perry)*

*“You won’t. The urge to work exists in more than ninety per cent of the population. Free him [sic] from drudgery and he [sic] putters in the garden, in a workshop, learns to draw, tries to write poetry, studies, goes into politics, invents,*

*sings, devises salad dressings, climbs mountains, explores the ocean depths, and tries to fly to the moon. Few are those who sit in the sun and whittle.”* (Master Davis) (Heinlein, 2004, p. 192)

An interesting point can be seen from Heinlein’s (2004) work. In this excerpt, he pointed to the complexity of the income support bureaucracy and the need to move away from the ideology of the deserving poor. Here, the difficulties in moving away from targeted models can be recognised as the debates tend to go back to the concern about idleness.

#### **6.4 Early Basic Income Proposals: Conceptual History**

The idea of a Basic Income grant is not new. For example, the works of Cunliffe and Erreygers (Eds.) (2005), Milner (1920), Van Parijs (2001), Thomas Paine (1797, Cited in Foote & Kramnick, 1987) and Agrarian Justice (Standing, 2002, p. 295) and Van Trier (1995) have provided insight into the longevity of debates on universal income support provision. Earlier studies on universal minimum incomes, such as Milner (1920), are useful for informing contemporary understandings of Basic Income proposals. Indeed, within Australia, the Whitlam Government during the 1970s attempted to pursue alternative income support policies based on social and economic rights, that is, guaranteed minimum income (Brotherhood of St Laurence, 2007; Saunders, 2005a, 2005b, 2005c, [SPRC]). Similar economic analyses, of Basic Income and feasibility on the international level can be seen in the works of Casassas, Raventós and Wark (2005, 2007) and Tomlinson (1987b, 2008) who examined Basic Income in relation to East Timor; and Goldsmith (2002, 2004) who explored the Alaskan context.<sup>39</sup> These theoretical analyses challenged dominant conceptualisations of income support by examining the viability of implementing a Basic Income model across a range of diverse countries. The analyses also drew attention to some of the complexities associated with transitioning to a Basic Income model of income support.

The emergent literature on the Basic Income model in international contexts (Farely, 1999; Galston, 2000; Lerner & Clark, 2000; Lerner, Clark & Needham, 1999; Phelps, 2000; Standing 2002, 2009; Van Parijs, 2000; Widerquist, 2000) and national contexts (see Tomlinson, 1989, 2000a, 2000b, 2001a; M. Watts, 2002; R. Watts, 1996) including similar commentaries from New Zealand (Boston, Dalziel & St John, 1999; UBINZ, 2003) explored the relevance of a Basic Income model when compared with traditional targeted models of income support. Such analyses revealed the way in which universal principles can be applied to income support policy.

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<sup>39</sup> Other researchers include, Haarmann and Haarmann (2005, Eds.) who examined the relevance of Basic Income to Namibia; Pinilla-Pallejá and Sanzo-González (2004) who explored the model’s relevance to Spain; Reynolds and Healy (2004) who examined universal grants in relation to Ireland; and Suplicy (2004) who reported on the relevance of Basic Income to the Brazilian context.

Some social policy theorists (for example, Cowling, Mitchell & M. Watts, 2003) have offered criticisms of the targeted approach to income distribution, yet these writers do not necessarily adopt an argument for Basic Income. For example, Cass (1986, 1988, 1995) for several decades argued for participation income with notions of independence and reciprocity as basic requirements of social citizenship, rather than advancing a universal income support system. Similarly, Cowling et al. (2003) argued against a Basic Income system in favour of the job guarantee model of income distribution. Yet M. Watts (2002) acknowledged that a job guarantee as a model for economic security in meeting social needs could be an initial phase in transitioning to an unconditional Basic Income. These critiques of the targeted approach, which offer alternative models such as job guarantees, are important for recognising the potential consequences of dominant approaches to vulnerable groups, together with the suggestion that transition to an alternative model can be realised. Recent policy debates on the international and national level have contributed to the Basic Income proposal achieving a higher profile. Political arenas are typical forums in which discussions are being carried out. For example, in Oslo, the Liberal Party included a Basic Income proposal in its policy platform. Similarly, in Canada, political figures such as Senator Hugh Segal<sup>40</sup> have advocated strongly for a guaranteed minimum income scheme via a negative income tax model.

Examining the political landscape and considering different criticisms helps to better understand the forces that shape disability income support policy discussions. This exploration, in turn, assists in envisaging an alternative reality and model for people with a disability in receipt of disability income support and the tensions between different stances. In Namibia, a pilot study entitled, the “Basic Income Pilot Project” has been conducted (Haarmann, Haarmann, Jauch, Shindondola-Mote, Natrass, van Niekerk & Samson, 2009). The Namibian Basic Income (BIG) Coalition examined the outcomes of the implementation of a Basic Income within the Otjivero-Omitara settlement community over a two-year period. Evidence of increased attention on the international level includes the BBC conducting a broadcast of a discussion on the Namibian Basic Income pilot project.<sup>41</sup> The BIG Basic Income Pilot Project Namibia (Haarmann, Haarmann, Jauch, Shindondola-Mote, Natrass, Samson & Standing, 2008; and Haarmann et al., 2009) found that the implementation of the provision of \$100 (Namibian) grant per month to all persons (under 60 years of age) who have resided since 2007 in the Otjivero-Omitara area went some way to minimising the effects of poverty and child malnutrition. The study also found that the Basic Income grant contributed to the reduction of crime and household debt.

The Basic Income Pilot Project study has generated debate on the political level. For example, Shejavali (2009a) reported in The Namibian broadsheet that the Namibian Prime

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<sup>40</sup> BIEN. (2008). Newsflash, Issue 51, May. <http://www.basicincome.org>

<sup>41</sup> For further details on the project see <http://www.news.bbc.co.uk> and <http://www.earthtimes.org>

Minister Nahas Angual was sceptical of the pilot project and perceived the Basic Income model as an inadequate measure as a Basic Income would “discriminate against those really living on the edge” (p. 3). Mr Angual believed that targeted approaches, such as an unemployment insurance and the disability grant, provide greater assistance as they assist specific groups in need. The Basic Income Grant Coalition countered the claim by arguing that targeted approaches to income support stigmatised groups and ultimately resulted in “large number[s] of people ... failing through the cracks of the Government’s social safety net” (Shejavali, 2009b). Similar conclusions to those of the Basic Income Grant Coalition were reached in South Africa. Ensor (2006) reported that the Social Development Minister, Zola Skweyiya (South Africa) placed the Basic Income proposal on the political agenda (ANC policy) by arguing for the grant to be introduced as a means to alleviate poverty for the reported estimated 23 million people living in severe hardship and disadvantage.

Other major discussions at the time of writing, conducted in countries such as the United States of America, Mexico, Brazil and Germany, including Bolivia and Ireland reveal the benefits of such a scheme as the Basic Income proposal. For example, some states have implemented a partial scheme, such as the Alaskan Permanent Fund, which provides a partial universal Basic Income to all Alaskan people. While the implementation in Alaska of a partial universal grant has not been without its challenges, the partial Basic Income grant has contributed to the betterment of people’s lives in the country. Even cities, such as Mexico City (Raventós, 2007) have implemented a form of Basic Income appropriate to their needs, whereas countries such as Brazil are examining the relevance of a Citizenship Fund as a precursor to the Basic Income (Basic Income Earth Network, 2009, [BIEN], refer to Newsflash No. 57, June 2009). Similar advances in Germany have led to the Basic Income proposal gaining merit on the political agenda (See BIEN Newsflash No. 57, June 2009).

Perhaps most notably, Nattrass (2006) contributed to the Basic Income debate by proposing that the introduction of a universal Basic Income grant in South Africa would assist in the alleviation of poverty experienced by people with AIDS. For Nattrass, a Basic Income grant provided to each individual would prevent households from experiencing poverty particularly in the event where one member loses access to their disability grant due to improved health through antiviral treatments. Stringent criteria render an individual with AIDS ineligible for the Disability Grant when improvements to health occur from antiviral treatments. Elements of this debate around separate eligibility requirements are apparent in the Australian Federal Government’s 2005/06 Budget papers relating to disability. Nattrass (2006), in arguing for a Basic Income Grant in South Africa, pointed out that research and financial simulations have demonstrated the potential impact that a modest payment would have on poverty and inequality reduction.

Developments within Australia have led to increased media exposure of the Basic Income proposal. Brian Donaghy's (2008) news item "Basic Income for all" was broadcast on *Radio National's* ([ABC]) Perspective Program, Monday 14 July 2008.<sup>42</sup> The contribution by Donaghy (2008) is the advancement of Basic Income as a sound alternative to the Australian targeted disability income support system.

A contradiction identified in the analyses by A. Atkinson (1996) on participation income and Cowling et al. (2003), Mitchell and Wray (2004), Mitchell and M. Watts (2004), M. Watts (2002), and R. Watts (1996) on job guarantee, is the linking of social citizenship to economic ideals, productivity and meaningful work; that is, a participative and productive citizen is one who is employed in the labour market. Adopting the productive citizen stance establishes connections between what constitutes a good citizen and economic ideals. Such a stance also highlights distinctions between those assumed to have the capacity to work (able-bodied) and those perceived to be unable to participate in work (disabled). R. Watts (1996) even goes as far as saying "I argue for the able bodied, the receipt of income should be conditional on undertaking work under a Job Guarantee OG) [sic] scheme" (p. 3). The danger in these arguments is the tendency to reinforce principles of productive citizenship based on social and economic participation and entrenchment of the oppression of people with a disability. Clearly, few studies have analysed the historical basis of disability income support and compared the different models of income support within Australia in relation to people with a disability.

Theoretical analyses in support of Basic Income, such as Baker (1992) and Van Parijs (2000), recognised that the approach is a relevant alternative to traditional targeted income support systems. Perhaps most notably, de Wispelaere and Stirton (2004) argued that "basic income is no longer perceived as yet another crackpot idea of the radical left. Indeed, it is increasingly accepted that basic income advocates have something valuable to contribute to the debate on welfare reform and employment regulation" (p. 266). The relevance of these comments by de Wispelaere and Stirton and studies, such as the Namibian Basic Income Grant pilot project, is in the suggestion that there is sufficient evidence to examine an alternative to the Australian disability income support system. New understandings of the capacity of an alternative model to promote the social citizenship of people with a disability can only be achieved through a comparative analysis of the Basic Income model with the Australian disability income support system.

The idea of a Basic Income, in terms of reflecting a sound alternative, relates to what FitzRoy and Jin (2011) and Tulloch (1979) described as the intermediary benefits, in which

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<sup>42</sup> Brian Donaghy is a Freelance Financial Journalist and his 'Basic Income for All' article and transcript can be accessed via <http://www.abc.net.au/rn>

the model allows for a balance between basic humanitarian ideals alongside economic concerns:

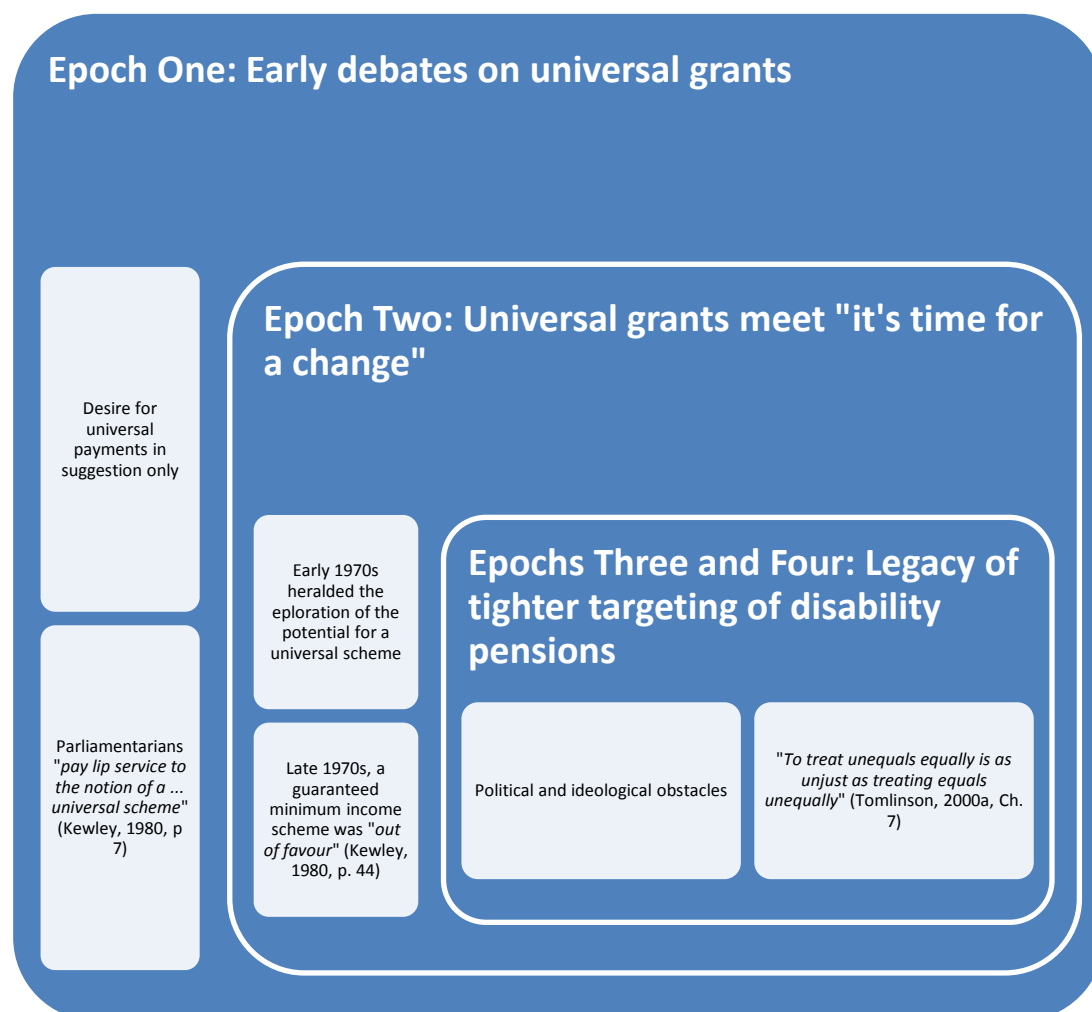
*The idea of a guaranteed income gained importance in many western countries as an offshoot of their various wars on poverty. The failure of existing social security programmes to provide or maintain an adequate standard of living for society's most vulnerable members was publicised.... Guaranteed income schemes were presented as rational and effective alternatives to the existing selective, piecemeal programmes of social assistance. (Cited in Tulloch, 1979, p. 143)*

In leading up to the next chapter (Chapter Seven), a contextualisation of the Basic Income proposal relevant to the Australian context is required to situate the policy comparison within the bounded Australian system.

## **6.5 Contextual History of Australian Debates on Basic Income Proposals**

The power of the ideological dimensions underpinning the Australian targeted approach provides one reason why the model of Australian disability income support remains the dominant policy response. Chapters Four and Five revealed the way the Commonwealth authority and conservative paternalism discourses across the epochs privileged and somewhat naturalised the targeted approach to Australian disability income support policy. The perpetuation of these discourses meant that particular historical and official narratives purported to marginalise alternative approaches (such as Basic Income). This privileging led to the targeted Australia disability income support policy approach being established as conventional wisdom. The historic bloc and hegemonic projects across the epochs further perpetuated and entrenched the targeted disability income support system in Australia. Yet challenges (counter-hegemonic discourses) to the dominant Australian disability income support system have emerged across each of the four epochs, in the form of policy (parliamentary speeches), dominant mainstream media (media releases) and alternative public debates (intellectual and citizen debate). Further, not all counter groups have embraced the notion that the existing approach to disability income support represents an adequate policy measure (such as, Commonwealth of Australia, House of Representatives, 1988, p. 92, Tomlinson). In keeping with the four epochs relevant to the study, these challenges to the dominant targeted Australian model and political debates on universal grants are illustrated in Table 8 (for a comprehensive examination, refer to Appendix Six). Table 8 scopes the four epochs and captures a key feature of each time period.

**Table 8 Challenges to the Introduction of a Basic Income in Australia across the Four Epochs**



The table demonstrates the critical reasons advanced by governments across the epochs for not adopting a Basic Income model. The ideological influences meant that governments tended to rely on traditional, targeted approaches to disability income support.

## 6.6 Chapter Conclusion

The critical examination of the Basic Income literature assists in contextualising the historical and contemporary debates of the Basic Income proposal. Exploring an alternative income support model based on universal principles and relevant to disability income support policy remains contentious. Within the Basic Income literature, limited attention has been drawn to the need for further theorising of the connection between disability and universal approaches. Although there are some exceptions (such as Murray, 2008 and Standing, 2002, 2009), the disability dimension in Basic Income discussions tends to be treated as a secondary issue. Where the gender dimension has attained prominence in Basic Income analyses, the concept of disability remains under-explored. Disability social theorists, including Clear and Gleeson (2002), Gibilisco (2003), Oliver (2009), and C. Thomas (1999),

have identified the need for a socially just disability income support system for people with a disability. However, these disability social theorists to date have not proposed an alternative model, such as Basic Income. While the idea of universal minimum income schemes have been explored in government policy debates, and some pension payment may be universal, to date within Australia, no such universal system is applied to the whole of income support provision. Therefore, what emerges from the discussion in this chapter is the need to bridge this gap between each discipline area and the gaps in the existing Australian disabling income support system.

The following chapter, Chapter Seven, examines the extent to which a Basic Income model can promote the social citizenship of people with a disability. The chapter does not go into the same level of detail as with the account of the Australian disability income support system analysis (Chapters Four and Five). However, the same Disability Income Support Analytical Framework was applied to uphold the integrity of the data analysis. Without an examination of the Basic Income model based on sound logical research methodology and methods, alternative approaches that do not rely on traditional policy responses and disablist notions will remain subverted or ignored in policy realms. The following chapter provides such an exploration of the Basic Income model relative to the Australian disability income support system.



## CHAPTER SEVEN

### **Social Citizenship, Non-Disablism and the Basic Income Proposal: A Critical Examination of the Intellectual Challenges Surrounding Basic Income Relative to Disability Income Support Policy**

‘People with disabilities’ ... require benefits, because of age, because of their inability to find work, or sometimes due to the nature of their disability. It would be wrong to force such people into poverty, or a lifetime of frugality and despair, as a consequence of their restrictions (impairments). They need a benefit system which neither forces them into jobs for which they are ill-equipped nor penalizes them for undertaking voluntary, community or part-time work. (Gibilisco, 2003, p. 137)

#### **7.1 Introduction to the Chapter**

The previous chapter (Chapter Six) provided a brief synopsis of the current understandings of the Basic Income support model. Chapters Four and Five of this thesis examined the history of the Australian disability income support system and explored the changes across time. This thesis argues that the Australian disability income support system has been disabling, given its tendency for the ideological themes of Commonwealth authority, and conservative paternalism, and entrenched disablism. The disabling nature of the Australian disability income support system has profoundly functioned to maintain individual-functional and charity theories of disability. Given these themes, an emerging aim was the need to examine the Basic Income model. Such an examination allows for determining the potential for an alternative approach to disability income support policy.

This chapter presents the findings from the analysis of the Basic Income model. In examining the Basic Income model, the researcher used the same Disability Income Support Analytical Framework, which was applied to the analysis of the Australian disability income support system (Chapters Four and Five). Thus, in applying the disability income support analytical framework, the study examined the degree to which Basic Income, as compared with the Australian disability income support system, promotes the social citizenship of people with a disability.<sup>43</sup> Two broad themes were identified from the data, under the overarching theme of social justice, non-disablist principles and citizenship. Within these two broad themes, three counter-ideology themes emerged from the Basic Income data. Each counter-ideology contained corresponding sub-themes.

These broad themes and counter-ideologies incorporated:

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<sup>43</sup> As noted in previous chapters, Basic Income represented the most appropriate contrasting model as a means to examine the underpinning ideological principles, rather than models such as job guarantees (Mitchell & M. Watts, 2004; Mitchell & Wray, 2004).

**1. *Basic Income as a universal right based on social justice, decency and non-disablist principles***

- i. Countering Commonwealth authority and power of the State: Freedom from regulatory control.
- ii. Countering conservative paternalism: From paternalism to social justice.
- iii. Countering the disablism: Decency - On the way to attaining a degree of socio-political independence.

**2. *Citizenship as a pre-condition for Basic Income, rather than categorisations of disability***

- i. Countering Commonwealth authority and power of the State: Freedom from regulatory control and classification.
- ii. Countering conservative paternalism: From paternalism to citizenship.
- iii. Countering the disablism: Autonomy - On the way to attaining a degree of socio-economic independence.

The Basic Income data also revealed four intellectual challenges relevant to the Basic Income model and the Australian context:

- *Basic Income addressing one aspect of disablism: The least oppressive form of income support*
- *Basic Income as a disincentive: Impact of the incentive/disincentive dichotomy*
- *Practicalities and design: Tailoring the model within the Australian context*
- *Basic Income: Not a utopian panacea*

The following section examines the themes and sub-themes related to social justice, non-disablist principles and citizenship. While this chapter provides an examination of the Basic Income model and emerging themes, it does not go into the same level of detail as with Chapters Four and Five. Rather, it provides insight into the underpinning principles of the Basic Income model.

## **7.2 Emerging Themes of Social Justice, Non-Disablist Principles and Citizenship**

This section now turns to examining the two broad themes from an analysis of the alternative Basic Income model. Table 9 summarises the themes and sub-themes (counter-ideologies) emerging from the Basic Income data, most particularly theme one, *Basic Income as a universal right based on social justice and non-disablist principles*.

**Table 9 Summary of Identified Basic Income Sub-themes for Theme 1**

1. Basic Income as a universal right based on social justice and non-disablist principles	
i. Countering Commonwealth authority and power of the State: Freedom from regulatory control	<ul style="list-style-type: none"> <li>➤ <i>Freedom from regulatory control: Redistribution based on fairness</i></li> <li>➤ <i>Distributive justice: Meeting basic need</i></li> <li>➤ <i>Basic Income as the non-disabling "necessary condition for a right to work"</i></li> </ul>
ii. Countering conservative paternalism: From paternalism to social justice	<ul style="list-style-type: none"> <li>➤ <i>Social justice for all</i></li> </ul>
iii. Countering the disablism: Decency - On the way to attaining a degree of socio-political independence	<ul style="list-style-type: none"> <li>➤ <i>A non-disabling society for people with disabilities based on decency</i></li> <li>➤ <i>Meaningful rights: Towards social justice and solidarity for people with disabilities</i></li> </ul>

Table 10 below summarises the themes, sub-themes and corresponding counter-ideologies emerging from the Basic Income data concerning theme two, *citizenship as a pre-condition for Basic Income, rather than categorisations of disability*.

**Table 10 Summary of Identified Basic Income Sub-themes for Theme 2**

2. Citizenship as a pre-condition for Basic Income, rather than categorisations of disability	
i. Countering Commonwealth authority and power of the State: Freedom from regulatory control and classification	<ul style="list-style-type: none"> <li>➤ <i>Social citizenship requirement: Freedom from conditionality</i></li> <li>➤ <i>Freedom from regulatory control and classification of disability</i></li> <li>➤ <i>Income support provision on the basis of citizenship rights, not a "proven disability"</i></li> </ul>
ii. Countering conservative paternalism: From paternalism to citizenship	<ul style="list-style-type: none"> <li>➤ <i>Freedom from paternalism</i></li> <li>➤ <i>Freedom from the burden of administrative complexity and cost</i></li> </ul>
iii. Countering the disablism:	<ul style="list-style-type: none"> <li>➤ <i>Socio-economic independence</i></li> </ul>

Autonomy - On the way to attaining a degree of socio-economic independence

- *Countering the disablism of the “plight of the invalid” and “disabled bludger” ideologies: Freedom from the stigmatising effects of classification*

## ***1. Basic Income as a universal right based on social justice, decency and non-disablist principles***

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### **Section Introduction**

A Basic Income emphasises social justice, decency and non-disablist principles where the aim of the model is to promote fairness in the reallocation of money and power across all groups in society. The findings in this section point to the idea that for a disability income support policy to be socially just, it needs to address the issue of income security. These ideas have important implications for disability income support policy. This section examines the themes of:

- Countering Commonwealth authority and power of the State: Freedom from regulatory control.
- Countering conservative paternalism: From paternalism to social justice.
- Countering the disablism: Decency - On the way to attaining a degree of socio-political independence.

Each of the corresponding sub-themes and counter-ideologies that emerged from the Basic Income data are examined.

#### **i. Countering Commonwealth authority and power of the State: Freedom from regulatory control**

The counter-ideology to Commonwealth authority and power of the State is emphasised in the Basic Income principle, freedom from regulatory control. The premise of freedom in a Basic Income proposal is underpinned by the social and economic rights outlined above. Countering Commonwealth authority challenges the Commonwealth authority ideology identified in the analysis of the Australian model of disability income support whereby across the epochs, Commonwealth authority equated unemployment and disability with irresponsibility and/or tragedy, both of which amounted to a burden on society. The sub-themes emerging from the countering Commonwealth authority and power of the State theme included:

- Freedom from regulatory control: Redistribution based on fairness;
- Distributive justice: Meeting basic need; and
- Basic Income as the non-disabling “necessary condition for a right to work”.

### **Freedom from regulatory control: Redistribution based on fairness**

A Basic Income proposal rejects the targeted model of disability income support and establishes freedom from regulatory control as the pre-eminent concept. For a Basic Income model, freedom from regulatory control is achieved through fairness applied to the redistribution, rather than an emphasis on targeted need. Countering Commonwealth authority is visible in the exploration of economic insecurity, which is a consequence of targeted income support schemes. The Standing (2002) text explored the broader implications of targeting:

*The euphemism of a social safety net has been a key to the process of globalisation. [Global reformist policies] have brought hardships for many, usually presented as a short-term pain for longer-term gain. To counter that, advocates of the international strategy have emphasised the need for short-term social safety net measures to alleviate the increased poverty, usually involving some means-tested minimum income scheme ... or workfare scheme. Such schemes are typically just short-term palliatives, often expensive, rarely effective and commonly inequitable. (p. 35)*

In this extract, the discursive frames are used to challenge the philosophical basis underpinning targeted models and global neo-liberal welfare changes. The text reveals the tendencies of targeted policy measures to be prescriptive, rather than redressing existing inequities and poverty consequences in the long-term. The significance of the above excerpt is the requirement for fairness in disability income support provision.

In Chapter Four, a key emerging theme in the later part of Epoch Two, and in Chapter Five, Epochs Three and Four, was the dominance of policies that moved away from full-employment to tighter targeting of disability income support with a greater emphasis on active participation in the labour market. For example, the notion of economic security and fiscal policy over social security and fairness was identified in the policy debates of Epoch Four, in which the then Senator Newman (2000) asserted “*good economic policy is good welfare policy*” (p. 10). In and of itself, economic growth does not necessarily guarantee a better quality of life for the majority of people. The assumptions in this illustration underpinning the Government’s emphasis on Commonwealth authority in the pursuit of economic growth failed to constitute an appropriate means for the re-distribution of wealth. The lack of justice and fairness in the policies, which focused on authority and economic principles, became subsumed under an impression of generalised acceptance by the wider populace. Consequently, the dominance of Commonwealth authority ideology resulted in governments disregarding alternative income support models such as the Basic Income.

The Basic Income model offers a counter challenge to regulatory control through the fairness principle. The Raventós (2007) text communicates this counter-ideology by using the discursive formation of “justice as fairness” in the following extract:

*With regard to the primary good of self respect, Basic Income would seem to be better than any conditioned subsidy.... This interpretation of justice as fairness ... on the basis of the importance given to self-respect, justifies Basic Income above any kind of conditioned subsidy. (p. 37)*

In this account, the Basic Income model promotes fairness by avoiding means-testing and unemployment traps whereby, people with a disability reliant on disability income support are not subjected to any conditions, monitoring, regulation or control. Disability social theorists, such as Clear and Gleeson (2002), found that the result for people with a disability, who have been subjected to regulatory control and harsh welfare changes, has been their profound marginalisation. Evidence of the marginalising effect of welfare-to-work initiatives for people with disabilities in receipt of disability income support in Australia was identified in a report to the Government by the Human Rights and Equal Opportunity Commission (2006, [HREOC]). Another extract from the Raventós (2007) text explains how this principle of fairness is achieved:

*Basic Income is defined as a 'bottom line' or 'base' that is not incompatible with other sources of income.... There is no need to 'hide' the fact of receiving a Basic Income and neither can it be withdrawn when income is received from other sources. (p. 124)*

The above extract demonstrates the counter social relations of power and ideology. Given that the Basic Income model has no conditions attached to the provision, people with a disability are empowered to access other forms of income without being subject to marginalising consequences or regulation. This point is further explicated in the next extract whereby the idea of fairness is upheld as a proletarian hegemonic principle in order to offer a counter challenge targeted approaches:

*The serious problem of interference by the social services [and social security] in the lives of beneficiaries, which is so characteristic of means-tested subsidies ... never arises with Basic Income ... because of the fact that it is universal. The only requirement is accredited residence, but the invasion of private life (for example in investigating ... levels of income) disappears. (Cited in Raventós, 2007, p. 127)*

In this account, the notion of universal provision and the absence of interference from the Commonwealth authority means that people without a disability are not set apart from non-disabled people. The discursive frame highlights the problems associated with means-tested approaches (such as interference), therefore giving credence to Basic Income as an ethically sound alternative.

The significance of the findings in this section is that the Basic Income grant contains the counter-ideology of freedom from regulatory control. Freedom from authority, regulation and control is attained through the fairness principle. The fairness principle when applied to the logic of the Basic Income grant is found in the universal and unconditional nature of the

scheme. The implication for people with a disability reliant on disability income support is the non-marginalising consequence of the Basic Income grant.

### **Distributive justice: Meeting basic need**

Closely aligned to the discursive theme of freedom from regulatory control and redistribution based on fairness is the concept of distributive justice. The construction of Basic Income as a redistributive category in meeting basic need is reflected in the excerpt: “*everybody needs a sense of basic security in order to function rationally ... be responsible, and ... to develop competencies*” (Cited in Standing, 2005a, p. 91). Here, distributive justice and meeting basic need is found in phrase “a sense of basic security”, which communicates economic security. As a counter challenge to Commonwealth authority, Basic Income functions as a means for generating an equitable distribution of benefits, as evident in the next discursive formation: “*a basic income ... as an instrument for social justice ... [is] a means of providing equal basic security necessary for a work-based society*” (Cited in Standing, 2005a, p. 101). The counter discourse underpinning a Basic Income challenges dominant targeted approaches through the “basic security” principle.

An excerpt from the Howe (2004) speech also reveals the distributive justice and basic security principles central to a Basic Income model meeting basic need: “*the advantages of GMI or Basic Income approaches is their effectiveness in ... encouraging a smoother income distribution curve which maintains equity.... There is also a sense of entitlement or right*” (p. 4). In this illustration, Basic Income has some capacity to address inequitable income support systems which have left vulnerable groups, such as people with a disability in receipt of income support, in a precarious position.

The principle of distributive justice forms part of the preconditions underpinning a progressive strategy for redistribution based on fairness, thereby generating an alternative hegemony and social reality (Gramsci, 1977, 1996). The discursive formation “*a necessary condition*” (Cited in Standing, 2005a, p. 101) is central to the Basic Income debate. The notion of “a necessary condition” suggests that the scheme can be effective only if the relevant socially just rights are enshrined and enacted. In a similar vein, disability social theorists Christie and Mensah-Coker (1999) found that a decent income support system for people with a disability needs to be treated as a right in order to redress inequities. Under a Basic Income, preconditions are necessary factors in the fundamental transformation of a system. For people with a disability in receipt of disability pensions this necessitates a change from the Australian targeted disability income support system, to the alternative Basic Income model (Gramsci, 1977).

Ensuring preconditions as a discursive practice, such as disability rights and justice as “a necessary condition” helps during transformation, to prevent Commonwealth authority and

conservative hegemony from undermining the alternative implementation of a Basic Income system. Basic Income has the capacity to direct structural change to income support policy based on distributive justice in meeting basic need. The principle of distributive justice is counter to the disabling reformist change that underpinned the targeted Australian disability income support system. Such a transformative strategy would function to minimise Commonwealth authority by operating as a constraining force in Commonwealth power (Gramsci, 1977). Thus, Basic Income represents an approach to shifting from economic and Commonwealth authority to social power through justice.

In Chapters Four and Five, it was identified that disability income support policies in Australia run counter to social justice and rights approaches for people with a disability. In contrast, a theme of transformational change underpinned by social rights is found in the excerpt by disability social theorist, Gibilisco (2005). Although Gibilisco (2005) does not propose a Basic Income model, his ideas echoed Basic Income advocates (such as Milner, 1920; Standing, 2005a, 2009; Van Parijs, 1997) in the call for a universal collective response for people with a disability, particularly in relation to income support, as shown in this extract:

*This divide between able bodied people and people with disabilities is destined to be further widened by the currently dominant political economic response to globalisation. This market driven, merit based political economic response will only further add to the impoverishment and social exclusion of most people with disabilities. In contrast, people with disabilities need a collective and empathetic approach that will allow many of them to be seen as more than people with lesser abilities.* (Cited in Gibilisco, 2005, p. 165)

Here, the disability income support policies dominated by economic principles is at distinct odds with the social justice principle in meeting basic need. This point can be seen in the use of language such as “impoverishment” (Line four, Gibilisco, 2005) surrounding the consequences for people with a disability in receipt of disability income support. The last sentence closely aligns the principle of social justice with the collective good of society and therefore based on humanitarian grounds, rather than political-economic values. On this basis, disability income support needs to be based on social justice principles to meet basic needs and protect the rights of people with a disability. Thus, the shift in terms of redistributive strategy and Basic Income necessitates more than just a change to policy language (Gramsci, 1977). Rather, it requires a change to the income support system as a whole.

For disability social theorists such as Gibilisco (2005), this transformation means changing the disability income support system. In the next excerpt, Gibilisco (2005) uses a humanitarian “social justice” discourse to support his argument: “*to succeed in reforming discrimination related to people with disabilities, the economic system itself must undergo serious practical changes which allow for an ethical and social focus on the people with disabilities in society*” (p. 54). Thus, from this extract, what is required is an approach based



on distributive justice, particularly one that captures the social and economic rights of people with a disability. Another discursive frame reveals the reasons for establishing a transformative approach to distributive justice in meeting basic need: *“disablement is something that can be overcome through the reorganization of society [or system]. The focus shifts from the individual body to the social context of life”* (Cited in Gibilisco, 2005, p. 193). Similar findings were identified by HREOC (2006) and peak bodies (such as ACOSS, 1975a, 1975b, 1976, 2005a, 2005b).

The discourse of Basic Income advocates Lo Vuolo and Raventós (2009) also reflects the transformative redistributive strategy for protecting vulnerable groups in society from unintended consequences. In this excerpt, the discursive formation illustrates why distributive justice is central to meeting basic need under a Basic Income model:

*Little is said about the need to revise the policies and institutions that distribute income and the right to an income. This is where BI [Basic Income] comes in as a rational policy for distributing income in a more stable and egalitarian way to people who live from their labour. It is also a complementary measure in providing a cushion when jobs are threatened by unemployment and the selfsame adjustments that are now in the pipeline for ‘confronting’ the crisis.*  
(Lo Vuolo & Raventós, 2009, p. 3)

In a Basic Income model, the idea of distributive justice is underpinned by ethical justifications. Where the Australian disability income support justifications in late Epoch Two, and Epochs Three and Four, centred on Commonwealth authority, a Basic Income attempts to establish an ethically just income support system to meet basic need.

A redistributive strategy for disability income support based on social justice is transformational, rather than reformist. A clear distinction between transformational and reformism emerges. Reformist discourses, such as those in the Australian targeted disability income support system, use repertoires that suggest the restructuring of systems. However, these changes tend to be short-term prescriptions that resulted in the tightening of social protection measures (Bezanson, 2006). For example, the peak body, Catholic Social Services Australia (2007), use the principles: *“human dignity, solidarity, subsidiarity”* (p. 23) to underpin the conservative approach in relation to disability income support. The discursive frame is then supported by the conservative ideology discourse evident in the next excerpt: *“Catholic Social Services Australia argues that the principle of eligibility according to need [equality and merit] should be restored”* (Cited in Catholic Social Services Australia, 2007, p. 26). Here, the redistributive strategy is based on conservative ideology in relation to distributive justice surrounding issues of need. Thus, in this excerpt, the redistributive strategy is inherently a passive revolution. This is particularly so given that the espoused principles of need and equality infer transformation, yet the change process is stringently managed in order to preserve the traditional hierarchy, authority and “natural” order of

society (Gramsci, 1977). True transformation of disability income support can only occur when egalitarianism underpins the redistributive strategy.

The Basic Income alternative model recognises such a need for a distributive justice based on egalitarianism as a precondition for true transformation to occur within any given epoch. The discursive theme of distributive justice, meeting basic need contributing to the good of society is seen in the following extract:

*A Good Society [with a Basic Income model] will ensure that everybody has sufficient security to enable them to have a decent existence and pursue their sense of occupation [rather than imposed work requirements]. Distributive justice is about the distribution of security just as much as about the distribution of income and the balance of control and freedom. (Cited in Standing, 2002, p. 238)*

The fundamental tenets of a Basic Income meet Gibilisco's (2005) criteria for distributive justice and meeting basic need. This criterion is illustrated in the next extract: "[an alternative] *must provide freedom from oppression, and ... meet any material needs that may arise from social relations of ... disability.... The attainment of such justice enable[s] all to ensure that their basic needs will be fulfilled*" (Cited in Gibilisco, 2005, pp. 116-117). In this account, the Basic Income proposal has the capacity to shift toward a socially just economy as opposed to an economy based on economic fundamentalism and the private market (Gramsci, 1977). For example, the next extract highlights the transformational effects: "*basic income can be viewed as a massive transfer of social surplus from the capitalist market sector to the social economy, from capital accumulation of what might be called social accumulation*" (Cited in Wright, 2005, p. 203)

The findings from this section suggested that the Basic Income model represents a just redistributive strategy and aligns with an appropriate, ethically sound alternative for people with a disability. The key theme emerging from this section is the call for distributive justice in meeting material need. A redistributive strategy based on justice can only be achieved through the transformation of disability income support system to a Basic Income model with moral obligations by the Government to implement such an egalitarian proposal. Counter discourses reveal the way discourse practice and hegemony are connected to the broader structures society. The accounts point to the need for an income support alternative that addresses the oppressive elements of the existing model. The Basic Income data indicated that the distributive justice, meeting basic need assumption underpinning the model suggests that a universal scheme could present such an alternative.

### **Basic Income as the non-disabling "necessary condition for a right to work"**

The counter discourse data revealed that the Basic Income model represents a non-disabling "necessary condition for a right to work". The discursive formation of a non-disabling necessary condition for a right to work emerges from the counter challenge to Commonwealth authority discourse. Consistent with the discursive frames of the Basic

Income model, the grant has the capacity to better reflect the needs of people with a disability. The discursive formation of a non-disabling right to work operates as a precondition in that people with a disability receiving income support are not excluded from labour market nor choice of occupation, whether paid or voluntary nonpaid work.

The Basic Income affords this right to work principle through the discursive theme: *“income paid by the government to each accredited member of society ... even if he or she does not want to work”* (Cited in Raventós, 2007, p. 41). This is in direct contrast to the Australian targeted model of disability income support which contained the defining criterion of permanent incapacity for work. The criterion presumed people with a disability were unable to participate in the labour market. In an effort to move away from these assumptions, later governments then focused on active income support policies to coerce people with a disability reliant on income support into the labour market. Yet, a greater reliance on economic policies and cost-cutting by governments in Epochs Two, Three and Four, led to increased insecurity in employment. The counter discourse indicated that given the consequence of increased insecurity for people with a disability receiving disability income support, the dominance of economic over social objectives can no longer be justified. In the Standing (2002) text, the notion of legitimacy relative to economic speak is problematised and makes clear the connection between targeting and employment insecurity. Basic Income contains the potential for shifting power to people with a disability by decommodifying labour power and strengthening social justice and social power (Gramsci, 1977).

Similarly, the Raventós (2007) text reveals the discursive practice used to structure legitimacy in the argument for a precondition surrounding the right to work:

*Basic Income might allow better access to remunerated work or employment for many individuals in different ways:*

- *By permitting greater flexibility in the job market that would not translate into vulnerability and social insecurity ... because it would reinforce the bargaining power of the weaker party in the job contract.*
  - *By making it much more feasible for many people to accept certain kinds of jobs that they might want to do ... but badly paid because of their low productivity.*
- (Cited in Raventós, 2007, p. 85)

In this extract, the Basic Income grant should be a right and not tied to notions of ability and non-ability to work. This is the case found in the assumption that when a Basic Income proposal is not linked to employment categories it then becomes a non-disabling “necessary condition for a right to work”. These findings are consistent with other commentary about Basic Income, such as Commonwealth of Australia (1975a). The forced or compelled labour, whether in work for the dole, job guarantees or participation income support, demonstrated in Chapters Four and Five, is not based on a right to work. Rather, it is an imposition and interference with autonomy.

The counter discourses underpinning the Basic Income model revealed that income support policies and labour market policies should remain distinct policy approaches with no stringent work impositions being formed. The implication is that any integration of regulatory policy aims tends to reify Commonwealth authority ideology and arguments that call for the further curtailment of welfare expenditure. The result of the policy mix is something of a conceptual blurring, which ultimately reduces the efficacy of income support policies. The vision underpinning the Basic Income model is about ensuring a universal income support policy premised on the principle of a necessary condition for a right to work.

The discursive frame of a necessary condition for the right to work has the potential for the decommodification of labour which in turn upholds the freedom of people with a disability. Under a Basic Income, people with a disability in receipt of disability income support would possess the right to work, as opposed to being coerced or compelled into the labour market (Gramsci, 1977; Wright, 2005), as seen in this discourse:

*Basic Income is precisely a strategy that attempts to provide the right to an income for everyone but not at the cost of the right to work. Rather it consists in distributing employment subsidies directly into the hands of potential employees so they (and not the employers) can decide what jobs merit the subsidy. (Cited in Raventós, 2007, p. 85)*

Here, the relevant idea is that a person with a disability can pursue an occupation of their own choosing. The above extract's construction about freedom and minimum income to support participation in the labour market is also reflected in the Milner (1920) text: "*the Minimum Income is ... an attempt to secure capability for work by abolishing destitution ... and an attempt to encourage willingness to work in an atmosphere devoid of Industrial Compulsion*" (p. 19). These illustrations draw attention to the dangers of governments relying on making connections between labour market policy and income support models and coercion as a means of redressing a presumed gluttonous welfare system (Commonwealth of Australia, House of Representatives, 1991f, p. 4267, Alston). In the Australian disability income support system analysis, disability and work equated with ability and productive citizenship, rather than fairness and disability rights. The connection between income support and labour market policies, as seen in the later epochs, in which people with a disability were expected to become productive citizens by participating in the labour market, represented a shift away from social justice aims. In contrast, the findings revealed that a Basic Income is established as a socially just income support policy, which leads to increased social and economic security through valued social participation in the labour market.

Perry (1995) recognised that for people with similar impairments, the outcome, particularly in terms of workforce participation, for each individual is different. It is this rationale of endurance that leads to the Basic Income model surpassing the targeted disability income support system. The illustrations communicated that there are no harsh penalties or

measures of income attached to the Basic Income. Therefore, in instances where an individual is unable to work, the individual would not be coerced into finding work. The absence of any conditions attached to the Basic Income is different from the findings of the Australian disability income support system, which was subject to changes over time. Chapters Four and Five indicated that these changes often contributed to generating further complexities in the attempt to standardise procedures and criteria.

The non-disabling right to work discourse functions to counter targeted models. This point is significant in a political economy whereby access to the labour market is restricted for people with a disability (as found in Chapters Four and Five). The following extract from the Raventós (2007) text demonstrates the counter discourse to coercive measures: “*none of these criticisms of workfare [or mutual obligation, for example limited access to employment] apply to Basic Income*” (p. 144). The rationale is that a Basic Income does not rely on reciprocal obligation. The discursive theme of reciprocal obligation was identified in Epochs Four and Five. The distinction is critical to identify in that a Basic Income, similar to that of the disability rights agenda promotes participation as a non-coercive right. Where a Basic Income model echoes the discourse of disability rights is in challenging Commonwealth authority through social justice and empowerment principles. The following extract draws attention to the discursive frame of justice: “[participation is] *a matter of social justice, which is connected to being able to seek help in ways which do not interfere with one's sense of self-worth and which are based on and lead to the exercise of choice*” (Cited in Galvin, 2004, p. 348). The extract indicates that participation in the sense of the disability movement concerns rights in which an individual is not linked solely to economic ideals of productive participation.

The findings in this section revealed the way the Basic Income model provides some measures in the attainment of disability rights and a non-disabling necessary condition for a right to work.

## ***ii. Countering conservative paternalism: From paternalism to social justice***

The principles of the Basic Income model counter conservative paternalism ideology. This section describes the sub-theme of countering conservative paternalism emerging from the data, which is:

- Social justice for all.

### **Social justice for all**

Countering conservative paternalism is demonstrated in Basic Income data, where the principles of social justice do not rely on paternalistic assumptions about people receiving

disability income support; nor does a Basic Income target different groups in society. Rather, the key underpinning principle is that a Basic Income provides social justice for all, not just the deserving poor (Lo Vuolo & Raventós, 2009). The Basic Income model presents an alternative reality to the deserving poor ideology: “a policy [such as the Basic Income scheme] or an institutional change is socially just only if it improves the security of the least secure groups in society” (Cited in Standing, 2005a, p. 92). Here, the principle of social justice for all functions to counter conservative paternalism ideology through the discursive practice of a necessary condition.

This counter-ideology to conservative paternalism is in contrast to the Australian targeted disability income support system. The consequences associated with targeted income support systems, such as the Australian model of disability income support, generates implications concerning social justice. As revealed in Chapters Four and Five, the medical evidence used in eligibility determinations for the Invalid/Disability Support Pension was influenced by moral justifications, such as the deserving poor ideology. The deserving poor ideology framing the Australian disability income support system identified across the epochs, failed to recognise that people with a disability, under the current form of capitalist society, need some form of income support to exist. Disability social theorists (such as Gibilisco, 2005; Oliver, 2009) have argued that any form of income support system for people with a disability should be socially just, rather than punitive or paternal. Punitive measures tend to perpetuate, and entrench the marginalisation of people with a disability (Gibilisco, 2005; Oliver, 2009). Indeed, the austere social policy changes to the disability income support system over time have prevented the pursuit of higher or even adequate levels of income support for people with a disability.

Where the issue of paternalism is indicated in the Basic Income data, the nature of paternalism is distinctly different from the applications identified in the Australian disability income support model. For Basic Income advocates, some degree of paternalism is required by the Government during the implementation of the model. The following extract reinforces the idea that although some form of paternalism is required. The distinction is found in the theme that paternalism is inherently different from conservative paternalism, given that Basic Income would be a periodical payment:

*A mildly paternalistic concern for people’s real freedom throughout their lives, not just ‘at the start’, makes it sensible to hand out the [citizens’ stake] in the form of a (non-mortgageable) regular [income] stream – just as a mildly paternalistic concern for their formal freedom makes it reasonable to prohibit permanent alienation of self-ownership. (Cited in Van Parijs, 1997, pp. 47-48)*

Here, the discursive formation indicates that under a Basic Income model, the notion of paternalism is different from conservative paternalism, as it relies on the frame of “freedom-preserving” rather than the “freedom restricting”. Thus, the Basic Income model is presented

as freedom preserving in relation to social justice for people with disabilities. The following extract further reveals the freedom-preserving influence of Basic Income:

*The case for a supplementary paternalism in the design of the citizen's stake policies does not seem unreasonable. Some paternalistic restrictions can surely be defended as restrictions that citizens would impose on themselves as an insurance policy against the stakeblowing potential of periods of irrationality and/or weakness of will. (Cited in White, 2006, pp. 70-71)*

Basic Income advocates and disability social theorists use rhetorical strategies to counter the hegemony of conservative paternalism by using a compelling argument for social justice. Basic Income advocates achieve this by presenting the Basic Income model as a socially just measure for disability income support. The social justice discourse does not rely on deserving poor rhetoric; rather the discourse establishes social justice as an inalienable right. The need for some form of paternalism is demonstrated in the Basic Income data. Yet, paternalism in relation to Basic Income is discursively framed as "freedom-preserving", as opposed to the "freedom-restricting" conservative paternalism that was demonstrated in Chapters Four and Five.

### **iii. Countering the disablism: Decency - On the way to attaining a degree of socio-political independence**

The countering of Commonwealth authority and conservative paternalism ideologies underpinning Basic Income, operated to challenge the disablism inherent in the Australian disability income support system. Two sub-themes of countering the disablism and decency emerged from the data. These were:

- A non-disabling society for people with disabilities based on decency; and
- Meaningful rights: Towards social justice and solidarity for people with disabilities.

#### **A non-disabling society for people with disabilities based on decency**

In the Basic Income data, decency refers to achieving a decent society which protects the rights of people with a disability through a socially just income support system. Disability social theorists, such as Abberley (1987), Gibilisco (2003, 2005) and Oliver (2009), make similar claims. The Basic Income proposal aligns with the aims of the disability movement in the development of a social theory of disability. This close alignment was common to both Basic Income and disability social theorists' accounts. A common emerging theme was that such a redistributive strategy, that is the Basic Income proposal, goes some way toward developing a society based on non-disablist principles including social justice and decency where disablism is redressed. The Basic Income model aligns with an egalitarian, non-disabling society. The non-disabling society and decency discourses were demonstrated the in this account:

*The idea that a Basic Income is socially just does not interfere with the fact that it enhances equity and promotes a more egalitarian society. The increased*

*income security which a Basic Income would give to low income earners and those without access to other funds, is part of living in a more egalitarian society.... There is nothing incompatible about working in an industrial system where there is widespread industrial democracy and living in a socially just country. (Cited in Tomlinson, 2007a, p. 34)*

The Basic Income proposal provides a relevant income support alternative for disability social theorists, because it generates a clear vision for what can be used to address disablism in disability income support. The Basic Income proposal also fits with the disability movement's central theme of social justice. Where the Australian disability income support system is disabling in nature, a Basic Income model would ensure a decent society that protects the rights of all people, including people with a disability, not just the "able-bodied". The data indicated that, in a decent society, the income support system does not discriminate between particular groups. This is because under a Basic Income model, entitlements would be egalitarian-based rather than needs-based:

***The greatest benefit to society as a whole will be the influence it has towards a more equal and egalitarian society*** [emphasis in original]....*This will not only provide the basis for a more cohesive and tolerant society, but also pave the way for a more diverse society ... more concerned with social satisfaction than with material wealth. (Cited in A. McDonald, 2000, p. 5)*

Here, the discourse of egalitarianism and decency function to present the Basic Income model as an alternative income support system for people with a disability. The discourse of egalitarianism and decency was consistent in Basic Income data. The key frame that a universal income support proposal is one way of ensuring the financial security of people with a disability allows for an alternative to the existing reality (Raventós, 2007, p. 108).

An extract by Lo Vuolo and Raventós (2009) illustrates the decency principle that promotes a non-disabling society:

*Blind trust [sic] in the positive effects of a short-term cycle of economic, employment and credit growth should be replaced by constant reformulation of fiscal transfers in order to bring a BI into operation and thereby underpin the growth cycle and avoid the worst effects of crises. The credit a citizen should have is ... one that is his or hers as the right to exist and to live in society. (p. 10)*

The above excerpt suggests the need for a non-disabling society built on social rights and decency. Here, the principle of decency is used to garner support for broad consent and a new collective will (Gramsci, 1977). In countering the disablism, the decency principle is established as a new truth and operates to challenge and replace dominant neo-liberal hegemonic views of disability income support policy.

### **Meaningful rights: Towards social justice and solidarity for people with a disability**

The data revealed the notion that rights should be meaningful, rather than token, as an important consideration for the Basic Income proposal. The increased vulnerability



experienced by people with a disability in receipt of disability income support points to an alternative grounded in social justice. Countering the disablism is found in the idea that rights for people with a disability can only be considered “meaningful” when people with a disability can exercise their rights.

The following excerpt contains a discursive frame of meaningful rights and solidarity for people with a disability: “*citizenship must be universal and equal[ly applied]. Why should the supposedly idle poor be forced to take directed work while the ‘idle rich’ are not?*” (Cited in Standing, 2002, p. 179). The social justice discourse underpinning this excerpt suggests that unlike the governments identified in Epochs Three and Four where the rhetoric of social justice was used to legitimise changes to Australian disability income support policies, a Basic Income is grounded in justice rights and solidarity. Thus, consistent with other discursive frames, under a Basic Income alternative, these rights would be applied to all persons, not just a privileged few (Milner, 1920; Standing, 2009; Van Parijs, 1997). The phrase “meaningful rights” together with the universalism discourse gives logical credence to the assumption of “rightness”.

Statements contributing to the meaningful rights, universalism and solidarity discourses are evident in the claims by A. McDonald (2000): “*the goal is not absolute equality, but equality of opportunity. All adults will have an entitlement to a common rate of income support. How they build on this will vary from person to person*” (p. 5). The relevance here is the connection between disability income support and social justice, which is assumed to be the underpinning principle of freedom and decency, considered essential for an egalitarian society. Thus, a just form of disability income support would need to provide the same opportunities for all people, rather than a select few.

Another extract shows that disability income support policies need to be transformed to ensure the meaningful rights based on social justice for people with disabilities:

*In many ways it was the empathetic welfare policies of pragmatic social democracy, when allied with the social movements that emerged around the struggle for rights for people with disabilities, which helped people with disabilities to achieve forms of empowerment, and to move from the political margins to the mainstream. In this regard, the goal for social policy must surely be to be continually updated and transformed to ensure it remains effective in promoting the social inclusion of people with disabilities.* (Cited in Gibilisco, 2005, p. 182)

The above extract indicates that a socially just model that moves away from authoritarian tendencies mitigates the necessity for targeting and moral imperatives. A socially just approach that ensures meaningful exercise of rights is especially important for people with disabilities in receipt of disability income support. The discourse of meaningful rights and solidarity is revealed in the next extract: “*it is wrong to assume people with a disability have the same opportunities as all in society*” (Cited in Gibilisco, 2005, p. 115). Thus, the provision

of a non-hegemonic form of income support system based on solidarity for people with a disability is required. Solidarity for people with a disability is demonstrated in the Basic Income principle of meaningful rights and participation:

*BI would be a characteristic trait of a society whose members conceive of themselves as living together for reasons which go beyond self-interest. Such a society would be implementing an extensive solidarity principle in order to grant solidarity between strangers, which is the only way to ensure the cohesion of increasingly complex and diverse societies. (Cited in Noguera, 2005, p. 120)*

In this account, a Basic Income grant is one way to achieve a socially just income support provision. The Basic Income model sets up specific rights and entitlements for people with a disability. This meaningful rights approach is evident in the discourses of tolerance, equality of opportunity and egalitarianism (Gramsci, 1977). The discursive formation, meaningful rights, towards social justice and solidarity for people with a disability operates as a unifying theme to promote a positive representation of egalitarianism (Gramsci, 1977). As such, it is a transformative strategy. Further, this notion also supports the inclusion of the disability dimension in Basic Income debates. For people with a disability to experience economic security and be treated equitably, an understanding of how oppressive differentiation in the categorisation of “other” functions assists in moving toward a socially just alternative.

## **Section Summary**

Countering Commonwealth authority and power of the State was reflected in the challenge to targeted disability income support systems and freedom from regulatory control. Basic Income as a redistributive strategy rejects regulatory control and provides a means for redistribution based on fairness. This idea of fairness is achieved through distributive justice and meeting basic need. Basic Income is also premised on the idea that it is a non-disabling necessary condition for a right to work as part of the redistributive strategy (Gramsci, 1977). Countering conservative paternalism was found in the dialectical relations and ideology which promoted the move away from paternalistic policies that regulate the behaviour of people with a disability in receipt of disability income support to the idea of social justice for all. The countering Commonwealth authority and countering conservative paternalism ideologies are linked to countering the disablism through the principle of decency underpinned by social justice discourse. From the decency position, Basic Income goes some way to attaining a degree of socio-political independence, which is the basis of a non-disabling, decent society for people with disabilities. The findings revealed the social justice discourse which pointed to the need for rights to be meaningful rights. The Basic Income model represents an income support system that promotes meaningful rights for the attainment of social justice and solidarity for people with disabilities, rather than as rhetoric in disability income support policy. Under a Basic Income, power would be transformed from economic to social power whereby people who have a disability are mobilised as part of a

collective will and considered valued members of civic society (Gramsci, 1977). The discourse of social justice and solidarity is central to the Basic Income proposal.

The next section examines the broad theme of citizenship as a pre-condition for Basic Income, rather than the disability income support policy trajectory in Epoch Two. It traces the themes of countering Commonwealth authority, countering conservative paternalism and explores countering the disablism.

## ***2. Citizenship as a pre-condition for Basic Income, rather than categorisations of disability***

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### **Section Introduction**

Citizenship forms an essential prerequisite central to the Basic Income proposal. As identified in the previous section, a Basic Income grounded in citizenship rights would preclude the need for targeting and pejorative associations with entitlements (who is deserving and who is not deserving) given that it is paid to all citizens who are eighteen years of age and over, regardless of income [dis]ability, and classifications. This section presents the themes of:

- i. Countering Commonwealth authority and power of the State: Freedom from regulatory control and classification.
- ii. Countering conservative paternalism: From paternalism to citizenship.
- iii. Countering the disablism: Autonomy - On the way to attaining a degree of socio-economic independence.

The section also describes the sub-themes emerging from the findings.

### **i. Countering Commonwealth authority and power of the State: Freedom from regulatory control and classification**

The Basic Income model counters Commonwealth authority and power of the State in its freedom from regulatory control and classification. In this theme of countering Commonwealth authority, the following sub-themes emerged:

- social citizenship requirement: Freedom from conditionality;
- freedom from regulatory control and classification of disability; and
- income support provision on the basis of citizenship rights, not a “proven disability”.

### **Social citizenship as a requirement, not conditionality**

The erosion of social citizenship which occurred under the Australian disability income support policies was underpinned by Commonwealth authority. Unlike the Australian disability income support system, the only requirement for a Basic Income is that of

citizenship within particular geographic and administrative boundaries. That is, the allocation would be contained within the country implementing the proposal and based on citizenship or permanent residency. Basic Income as a means to counter Commonwealth authority and regulatory control is demonstrated in this discursive formation: *“the expression ‘basic income’ convey[s] both the notion that it is granted by virtue of an unconditional entitlement, and the idea that any income from other sources will come on top of the basis it provides”* (Cited in Van Parijs, 1992, p. 2). Thus, a Basic Income is a universal income provision on the basis of citizenship, rather than conditionality.

The difference between Basic Income as an unconditional grant and the Australian targeted disability income support system is the principle of liberty and basic security. The next extract demonstrates the discursive formation legitimising the Basic Income model:

*Basic security is the essence of real freedom. The term ‘real’ is inserted because freedom requires ... liberty.... Liberty is enhanced by the removal of controls ... positive liberty is a form of security that gives us self-control, a sense of autonomy that allows us to develop ourselves as human beings within a community.* (Cited in Standing, 2005a, p. 92)

The critical feature that distinguishes Basic Income from the Australian targeted model relevant to disability income support is that payments are free from any conditions. Chapters Four and Five revealed the long history of conditions attached to disability income support. Tight requirements formed the basis for disability income support eligibility. The following extract further communicates the unconditional feature of universal grants: *“[the] proposed Minimum Income for every man, woman, and child in the country ... would be paid to everybody, without conditions, and subject to no deductions”* (Cited in Milner, 1920, p. 19). Further, applying conditions within reformist policies tends to maintain the essence of inequitable income support systems, that is, harsh targeting (Commonwealth of Australia, House of Representatives, 1988, Tomlinson). Disability social theorists, such as Abberley (1987), Barnes and Mercer (2003), Oliver (2009), Russell (2001a) and C. Thomas (1999), have raised similar points, although few disability social theorists, with the exception of Gibilisco (2005) and Jordan (1984) directed attention to the need for a Basic Income requirement as part of attaining social citizenship for people with a disability.

The data revealed that a Basic Income grant is free from Commonwealth regulatory controls and has the capacity to provide people who have a disability with the freedom to supplement their income through other means, such as remunerated work or an occupation of their choice. Each of the epochs highlighted the close connection between conditionality and the assumed need for regulatory control underpinning disability income support. The effects of relying on disability conditionality centres on reifying existing conservative and inequitable structures of income support policy. The notion of conditionality is in direct contrast with the aims of a Basic Income model. The social citizenship requirement and freedom from Commonwealth regulatory control discursive theme is found in an extract by Milner (1920):

*The simplest physical factor is the need of all human beings for food and clothing; the simplest psychological factor is the longing of all human beings for a free control of their own lives, and upon these two factors the Minimum Income [Basic Income] is based. (pp. 16-17)*

In this illustration, social citizenship and freedom from regulatory control is critical to a Basic Income model. Income support policy can only be considered just if they are free from coercive control. Chapter Five revealed that not all groups, such as self-funded retirees, were subject to the same stringent conditions applied to people with a disability in receipt of disability income support. Drawing on this logic, the Australian disability income support system can be seen to be an unjust policy built on conditions, whereas the Basic Income reflects a just policy on the basis of its social citizenship principle and lack of disabling conditions. The claim that a Basic Income is paid to all regardless of whether a person with a disability engages in paid work or not (Raventós, 2007, p. 9) represents the reconstitution of social citizenship and a significant shift from traditional disability income support policies (Gramsci, 1977). This is evident in the following extract: “*entitlement to ... [a] fair share is no doubt unconditional with respect to both income from other sources and willingness to work*” (Cited in Van Parijs, 1992, p. 10). Here, Commonwealth authority and conditionality is transformed. This transformation occurs through a change in meaning. Thus, social citizenship shifts from the language of economic participation to a new interpretation based on social and political participation and collective responsibility.

The following account also captures the social citizenship requirement underpinning a Basic Income proposal:

*Giving an unconditional income to everybody would be a good way to guarantee the recognition of all the members of a society, when the labour market cannot perform that function. In addition, basic income would achieve one of the objectives of social rights, because it would end society's reliance on the market to satisfy the most basic and fundamental needs of its members, something that is necessary for the exercise of citizenship. Basic income would give recognition to all citizens, independent from the market. (Cited in Pérez, 2005, p. 232)*

These illustrations challenge the hegemonic consequences of conditionality associated with disability income support policy. A Basic Income proposal suggests that citizenship rights operate independently from the market or Commonwealth authority. Thus, people with a disability are free to exercise their basic citizenship.

The Basic Income grant does not apply productivity incentives to the provision. This is in direct contrast to the way in which Australian governments have traditionally designed the disability income support system. From the Basic Income perspective, compulsion is not required as coercive means are considered unnecessary and counterproductive. As long ago as 1920, Milner addressed this very point at length. For example, an extract from Milner (1920) is typical of this discursive theme:

*The Minimum Income is thus an attempt to secure capability for work by abolishing destitution (as to which it is new only to the extent of its simplicity) and an attempt to encourage willingness to work in an atmosphere devoid of Industrial Compulsion. (p. 19)*

The data indicated that Basic Income model posits freedom from control and coercion as a fundamental element of basic security given the central principle of being an unconditional payment (Casassas et al., 2007; Standing, 2002, 2009; Van Trier, 1995). Similar discursive themes are found in the Milner (1920) text: *“the only possible way of eliminating economic destitution without putting any restrictions on the freedom of the unfortunate ... is to ensure that every one has, independently of their earnings, a secure income ... this is the Minimum Income proposal”* (p. 18). Here, the legitimising principle for a Basic Income proposal is freedom from regulatory control and conditionality.

The claim is made that the Basic Income grant is a right without specific obligations or conditions (Casassas et al., 2005; Milner, 1920; Standing 2002, 2004, 2009), which is made visible in the following extract: *“a policy ... change is just only if it does not impose controls on some groups that are not imposed on the most free groups in society”* (Cited in Standing, 2002, p. 92). Here, the principle of freedom from regulatory control and conditionality is emphasised in the discursive formation whereby the Basic Income model imposes no such restrictions on particular groups, such as those found in welfare-to-work schemes (for example, mutual obligation requirements in Epoch Four). Social citizenship is upheld because any controls would apply to all citizens, not just a select few. Evidence of this standpoint of social citizenship as a requirement not conditionality can also be found in early parliamentary debates. The following extract exemplifies this discursive theme of social citizenship as a requirement not is demonstrated in a parliamentary speech by the then Senator Lees (SA, Australian Democrats): *“it is an accepted view that citizenship confers a right to adequate income to fulfil [sic] basic needs”* (Commonwealth of Australia, Senate, 1991a, p. 4272, Lees, SA, Australian Democrats). This discursive theme points to the idea that social citizenship is the key starting point for meeting basic needs and redistribution, as opposed to coercive and regulatory strategies. As mentioned in this section, the Basic Income standpoint is different from the existing Australian disability income support system.

The findings of this analysis suggest that Basic Income promotes the social citizenship of people with a disability through its challenge to Commonwealth authority and rejection of conditionality (Gramsci, 1977). Social citizenship is reconstituted under a Basic Income model to represent a social right, rather than a conditional moral duty.

### **Freedom from regulatory control and classifications of disability**

The analysis of the Australian disability income support system revealed the long history of classifying people with a disability as a basis for disability income support eligibility. In

contrast, the Basic Income data indicated that the grant provides some means of addressing the Commonwealth authority ideology of the Australian disability income support system, as the payment goes to individuals (rather than categories of family units), irrespective of age, class or disability dimensions and any income received from other sources (Casassas, et al., 2005, 2007; Milner, 1920; Standing 2002, 2004, 2005a, 2005b, 2009). This point of non-classification is a critical consideration given that the disability income support system was found to be a contributing factor in the disablement process itself (Tomlinson, 2000a, Ch. 7). The data further indicated that a Basic Income provides a strategy to redress the Commonwealth authority ideology as the consequence of individuals receiving the Basic Income grant means that people with a disability have greater control over their economic means and are free from the disabling practice of classification. To be established as an effective strategy, the Basic Income proposal needs to use a convincing claim that reinforces the socio-economic independence of people with a disability. One way the proposal achieves this is through the discursive theme of freedom from regulatory control and classifications of disability.

The Basic Income approach is underpinned by the principle that it is paid irrespective of any income received from other sources and is a right without specific obligations (Raventós, 2007; Standing 2004, 2009; Tomlinson, 2006a, p. 53). This discursive theme is revealed in the following extract:

*It [Basic Income] does not discriminate in terms of personal features.... The fact that some people would have been unable to use the commons, for example owing to a physical handicap, by no means deprives them of their shares. (Cited in Van Parijs, 1992, p. 10)*

Here, this discourse is concerned with the way the Basic Income model makes obsolete disability classifications. Thus, unlike the Australian disability income support model, which classified people with a disability (for example, capable or genuinely disabled), under a Basic Income, there would be no such classification. This is because the payment is not subjected to means- or assets-testing (ACOSS, 1976; Milner, 1920; Saunders, 1995, [SPRC]; Social Policy Research Centre, 1989, [SPRC]; Standing, 2002; VCOSS & Good Shepherd, 1995). Further, the Basic Income grant would remove classifications on the basis of disability, given that there are no assessments or eligibility criteria, apart from the citizenship criterion.

Another extract exemplifies the freedom from classifications of disability discursive theme found in the Basic Income data:

*It is suggested that a straightforward monetary payment ... or 'social dividend' should be paid to every man, woman and child in the country.... This would take the place of all social security benefits, such as unemployment benefit, old-age pensions, health benefits.... Every man, woman and child would thus have his or her basic minimum whether in sickness or in health, in work or out of work, young or old. There would be no means test and no tests whether a man [sic] was*

*seeking work or whether a man was genuinely ill. Doctors could stop writing out health certificates. (Cited in Van Trier, 1995, p. 356)*

The above extract reveals the way a Basic Income grant does not distinguish between particular groups such as people who are unemployed or people with a disability. Rather, the counter challenge offered by the Basic Income proposal is found in the phrase, a Basic Income “would take the place of all social security benefits” (Line two in the Van Trier, 1995 excerpt). The theme of social citizenship and freedom from classifications is shown in the discourse of not distinguishing between impairments or using deficit criteria during assessment for disability income support. Disability social theorists made similar statements concerning upholding social citizenship for people with disabilities in relation to disability income support.

The idea that a Basic Income is paid to all citizens irrespective of being a part of a specific group or benefit type (for example unemployed) and defining characteristic (such as disability) is cornerstone to the proposal. Chapters Four and Five revealed the complexity involved in quantifying, medicalising and measuring disabilities, together with tying impairment conditions to notions of work capacity. Countering Commonwealth authority ideology prevents the tendency for classifications to be equated with assumed helplessness assumptions and focusing on individual deficiencies. The discourse of classification showed that any attempt to determine a satisfactory measurement of incapacity and impairment constituted a false sense of quantification. An extract exemplified the problematical nature of the classification of disability:

*[Where a] person is eligible for invalid pension if, by reason wholly or mainly of a medical condition, he [sic] is unable to earn a livelihood and will remain unable in the foreseeable future. Since we are dealing with extremes of human need, eligibility must be determined with a high degree of accuracy. But accuracy is not achieved, as shown by the frequency of disagreement between decision makers; nor can it be. The class of events, 'medical conditions', can not be defined precisely. (Cited in Jordan, 1984, p. 256)*

In this account, the classification of disability does not lead to enshrining social citizenship, nor equity of distribution. The Basic Income grant would prevent the tendency to create classifications on the basis of disability. The central issue emerging from these complexities centres on the way the prevailing ideology underpinning the Australian disability income support system tended to be reliant on individual-dysfunctional and medical criteria in determining disability income support eligibility. The consequence of ascribing deficit norms to disability income support is the perpetuation of Commonwealth authority. A Basic Income model operates counter to Commonwealth authority in its rhetoric of freedom from regulatory controls. The Basic Income grant also secures the social citizenship of people with disability through its freedom from classification of disability as the grant is applied equally to all citizens.



### **Income support provision on the basis of citizenship rights, not a “proven” disability**

The Basic Income data revealed that the grant would prevent the tendency to create categories on the basis of disability. The data indicated that this is because Basic Income is framed around the notion that an unconditional grant that is provided to all (on an individual basis, within a country of implementation), and has no means-testing, targeting, or work requirements attached to the payment (BIEN, 2012; BIGA, 2012; Milner, 1920; Standing, 2004; Van Trier, 1995). Basic Income is counter to the Australian targeted disability income support system as the provision of the grant does not require medical evidence of a “proven” disability. The following extract highlights the citizenship rights discursive frame underpinning the Basic Income grant: *“the aim should be as speedily as possible, to make the dividend [Basic Income] large enough to cover the ... needs of every citizen. Being paid as a civic right, it will be of equal amount for all”* (Cited in Van Trier, 1995, p. 392). In this account the provision is paid on the basis of an individual’s civic right, as opposed to a “proven” disability. A Basic Income model uses the civic rights discourse as a counter-hegemonic politics to transform the traditional Australian targeted disability income support system (Gramsci, 1977).

Discursive frames around the citizenship rights and not a “proven” disability discourse communicated the idea that a Basic Income proposal prevents the tendency for generating disabling distinctions on the basis of disability categories and notions of citizenship connected to productivity. The following extract illustrates the discursive formation which reveals the rationale underpinning the assumption that the provision of a Basic Income grant does not remain dependent upon the categorisation of disability: *“there will be a common rate of income support for all adults, removing the need to categorise people by the nature of their benefit”* (Cited in A. McDonald, 2003, p. 4). This account makes visible the devices which categorise people according to the nature of the pension or benefit. The discursive formation of the Basic Income principle that the grant is paid to all people transforms the discursive frame into citizenship rights language, which, in turn, prevents categorising on the basis of disability.

The inherent problems within the Australian disability income support system were examined in detail in Chapters Four and Five. Where the Australian system of disability income support relied upon the measurement of disability as part of the eligibility requirements, a Basic Income does not factor in the quantification of disability as a precondition. The findings of Chapters Four and Five also captured the complexities associated with Invalid Pension eligibility requirements and the 85 per cent ruling. The difficulties in arriving at sound determinations when an individual was assessed as 84 per cent incapacitated is demonstrated in the following extract:

*Someone who is assessed as 86 per cent incapacitated gets a full invalid pension; someone who is only 84 per cent incapacitated gets nothing. While it is true that our piecemeal reforms would provide income support for many who now*

*have reasonable claims to assistance yet find themselves outside the traditional favoured categories, boundaries must still be drawn, and in them lies the probability of inequity.* (Cited in Commonwealth of Australia, 1975a, p. 68)

This excerpt illustrates the tendency for targeted approaches using the discursive theme of a “proven” disability to legitimate the existing status quo and to deliver entitlements only to those categorised as having a disability. Across the epochs, citizenship for people with a disability reliant on income support was contingent upon notions of productive citizenship, economic participation, and constructions of genuinely disabled (for example, the notion of compliant invalid citizen in Epoch Two and regulated disabled citizen in Epoch Four).

In contrast, the universal application of the Basic Income grant means that payment is to all citizens not on the basis of a “proven” disability. This perquisite is highly useful for preventing unintended consequences, such as the plight of invalidism and disabled bludger constructions identified in Chapters Four and Five. The discursive strategy of income support provision on the basis of citizenship rights, not a “proven” disability is shown in the following discursive formation:

*The problems of design and administration of income security provisions for the unemployable and hard-to-employ is one of the more convincing demonstrations of the desirability of a system of payments involving no judgment of capacity - a system of guaranteed minimum income.* (Cited in Jordan, 1984, p. 259)

Here, the discursive frames convey the similar social citizenship intentions of disability social theorists. The significance of this frame is the propensity for targeted income support models to become exclusionary and generate surrogate measures (Goodin, 1992). When stringent conditions are applied, the likelihood of target inefficiencies and moral judgements increases, thereby excluding those who most need the provision. Thus, through tight means-tests, vulnerable groups, such as people with a disability, may be overlooked and thus, fall through the gaps. The important discursive theme to emerge from the findings is that a Basic Income model, unlike targeted approaches, makes no such presumptions (such as preferential treatment between payments, as in the Invalid Pension and Blind Pension). A Basic Income scheme suggests that only through universal grants can the tendency for sociological errors be avoided. The next frame conveys the significance of income support granted on the basis of citizenship rights, as opposed to a “proven” disability:

*By so doing, it [a Basic Income] manages to be less prone to sociological error and less vulnerable to social change than ... [other] modes of social security provision. That, in itself, counts very much in its favour in a world in which sociological facts are uncertain, highly variable and ... constantly changing.* (Cited in Goodin, 1992, p. 198)

This statement shows how the implementation of a universal model of income support would assist in addressing conceptual problems and prevent any associations with Commonwealth authority and proving disability found in the Australian disability income support system.

The next account also makes visible the argument that a Basic Income is a viable and “desirable” counter-ideology to the Australian disability income support system, given the inherent problems of the Australian targeted model. In this account, the idea of universality surpasses conditionality and the need for determinations that “prove” disability:

*It is an unconditional and universal income given by governments to every citizen and resident. The main differences between basic income and other programs of the Welfare State is its universality (because the same quantity of money is given to everybody) and its unconditionality (because it is given regardless of ... whether you are rich or poor).* (Cited in Pérez, 2005, p. 232)

The next excerpt illustrates the way citizenship is discursively reframed as a social condition under Basic Income schemes, rather than a behavioural obligation or requirement: “*a right is possessed by virtue of a person’s humanity or citizenship, and cannot be made dependent on some behavioural conditionality*” (Cited in Standing, 2008, p. 5). The counter-hegemonic strategy of citizenship rights as a precondition is used to point out the categorising forms of disability income support and transition to a system whereby social citizenship for people with a disability can be achieved.

Although a Basic Income grant does not ascribe notions of a proven disability, the differences between impairments are important for other changing needs over the lifespan. The different disability experiences are exemplified in the following extract:

*If ... one flexible provision might do the job of providing basic income security, broader policy should at least distinguish between life-long disability, physical impairment in youth and middle age, behavioral conditions not so unrelenting and long-established as to be taken as permanent, terminal illness and conditions which in effect represent premature aging, and those distinctions might have consequences for income security.* (Cited in Jordan, 1984, p. 261)

Here, the discursive formation suggests that rather than quantify and “prove” the existence of an impairment based on traditional approaches, the differences between impairments in other policy can be accounted for in terms of a human condition life model. The disability experience and life course approach is similar to what Galper (1980) and Rowlingson (2009) proposed. Galper (1980) highlighted the need to account for changes throughout an individual’s lifetime, such as the need for additional lifestyle supports, rather than generate measures of disability. Thus, assessment would be around specific needs of impairment and an individual’s changing needs over time, rather than based on “categories of disability” (for example, design for sub-systems that assess throughout the life span and assessed when older or younger according to need) (Galper, 1980; Rowlingson, 2009).

The Australian disability income support system underpinned by Commonwealth authority has generated categories on the basis of disability. This categorisation contrasts with the Basic Income principle of providing for all people with no imposed obligations attached to the grant.

## **ii. Countering conservative paternalism: From paternalism to citizenship**

Connected to countering Commonwealth authority and countering regulatory control measures (such as welfare-to-work schemes) is countering conservative paternalism, which tend to be “*the most paternalistic means of attempting to provide income security to the unemployed*” (Standing, 2002, p. 154). In this theme, countering conservative paternalism reflected in the sub-themes of:

- freedom from paternalism; and
- freedom from the burden of administrative complexity and costs.

### **Freedom from paternalism**

The data indicated that the Basic Income proposal reflects a move away from traditional paternalistic policy approaches to disability income support. Countering conservative paternalism and freedom from paternalism is evident in the discourse of paternalism test principle. The relevance of the paternalism test principle was found in the following extract: “[the] *opposite of this [paternalism] is the citizenship rights approach, in which everybody is granted a guaranteed basic income as a right of citizenship, without any labour-related condition*” (Cited in Standing, 2002, p. 154). In this account, social citizenship is attached to universal grants, rather than the reliance of traditional models, such as the Australian disability income support system, emphasis on benevolence or paternalism.

Another discourse suggests that the Basic Income proposal functions as a counter-ideology to conservative paternalism:

*A right is possessed as a mark of a person's humanity or citizenship, and cannot be made dependent on some behavioural conditionality. So, for instance, people should not be expected to have to plead for assistance in times of need, or to have to rely on the selective benevolence of civil servants or politicians. Their social and economic entitlements should be rights, not matters for the discretionary decisions of bureaucrats or philanthropists or aid-donors, however well meaning those may be.* (Cited in Standing, 2007, p. 6)

The discursive frame above highlights the legitimising function of the Basic Income strategy through the articulation of the freedom from paternalism principle. The framing of the discourse invites the reader to consider the way paternalism, benevolence and coercion attached to income support dehumanises people in need of the provision (Gramsci, 1977). The discourse also functions as an appeal to introduce humanist principles identified in the

frame: a “person’s humanity” (Line one in the Standing, 2007 excerpt), which is akin to social citizenship. The grounding in social citizenship, social power and economic rationality goes some way to preventing conservative paternalism. This stance is in contrast to the economic irrationality which has dogged much of the history of the Australian disability income support system identified in Chapters Four and Five (for example, conservative paternalism was found in the concepts of conservative mistrust, inadequate invalids, concern for idleness, undeserving invalids and genuinely worthy of a disability pension). The Australian disability income support system underpinned by conservative paternalism has generated distinctions based on the ideology of the deserving and undeserving poor invalids. The above discursive formation suggests the need for a universal grant containing no such distinctions of disability to counter the ideology of deserving and undeserving poor invalids. The theme of countering conservative paternalism is reproduced in the assumption that a Basic Income model would remove associations with the ideology of deserving and undeserving poor, given its principles grounded in civic rights, social power and economic rationality (Gramsci, 1997, 1996; Wiseman, 1978).

Conservative paternalism discourse has been identified as a barrier to the implementation of alternative models. The perpetuation of conservative paternalism, together with Commonwealth authority, represented one of the problems underpinning the Australian disability income support system. Ongoing legislative, policy and administrative changes did little to shift away from the ideology of conservative paternalism. The following statement reveals the influence of ideology in perpetuating conservative paternalism, which in turn entrenched the Australian disability income support system: *“any development towards a guaranteed adequate income would necessitate a major change in the direction of prevailing ideologies [as] ... conservatism, constitutes the main ideological obstacle to the introduction of universal income guarantees”* (Cited in Tomlinson, 1987b, pp. 5-6). Here, even with legislative and procedural changes to disability income support over time, the entrenched norms continued to prevail within an existing Australian disability income support system. Thus, in order to counter conservative paternalism, a strategy based on freedom from paternalism was required.

An extract shows how the Basic Income grant functions to counter conservative paternalism, distinctions and disabling tendencies:

*Universal income support can be defined in terms of absolute freedom from ... any relationship to need.... This is a big step away from the view that income support has one role and one role only, i.e. to provide a “safety net” for the poor, the disadvantaged, the aged and infirm.*

*Universal income support is designed to provide financial security for all citizens. It will give all citizens an equal share of national income sufficient to offer every person a basic standard of living. (Cited in A. McDonald, 1995, p. 8)*

In this account, the conservative ideology underpinning the Australian income support system is being contested to provide a commonsense, socially relevant and just alternative based on social citizenship, that is, the Basic Income model (Gramsci, 1977). Here, the discursive formation allows for the emergence and constitution of the Basic Income model to present as a possible alternative to conservative paternalism (Gramsci, 1977, 1996). The discursive frames of universal provision and citizenship rights form one of the unique features of the Basic Income alternative. Here, the freedom from paternalism discourse and disability distinctions is patent. Other, typical representations of Basic Income, such as Baker (1992), Milner (1920), Natrass (2004), Raventós (2007), and Van Parijs (2002), recognised that the Basic Income grant is a relevant alternative to traditional paternalistic income support systems for contemporary society.

The next extract suggests that a Basic Income is a relevant alternative as it operates to separate income security from notions of charity and punishment:

*For basic income security, the income must be in a form that is non-paternalistic. It should not be given to you as a discretionary gesture ... it is not charity. It must be in a form that permits you to decide how to use it. It must be individual and it must be equal, with supplements for those with special needs, disabilities or frailties. Finally, it must be in a form that enables people to make rational choices. (Cited in Standing, 2005a, p. 92)*

The discourse underpinning this extract suggests that an unconditional approach would enhance the social citizenship of all people by removing the necessity for paternalism. Unlike the Australian disability income support system in which notions of reliance on disability pensions equated with charitable dole, invalid welfare dependants or malingering, the Basic Income model makes no such presumption around charity and paternalism. The Basic Income model is grounded in assumptions that enhance the autonomy of individuals, which can provide security for vulnerable groups, such as people with disability.

A discursive formation demonstrates the way in which conservative paternalism is countered and income security is achieved through a Basic Income:

*A guaranteed income with its inbuilt assurance of regularity allows for a greater command of resources over time.... 'Regularity of income is as important as the level of income', and the increased ability to plan as insecurity was diminished was recognised as an important aspect of the income supplement. (Cited in Tulloch, 1979, p. 149)*

Here, the discursive theme centres on freedom from paternalism and greater security through the individual control of resources. This non-paternalistic assumption of the Basic Income model is in line with disability social theorists who have long concluded that the same opportunities for the control of own resources have not been afforded to vulnerable groups, such as people with a disability reliant on income support (Gibilisco, 2005)

Although, the data indicates that a Basic Income grant has the capacity to counter conservative paternalism, the data revealed that debates on the model (such as Töens, 2000; White, 2004, 2006) identified the propensity for the model to reinforce the very paternalism the grant seeks to redress. Indeed, Van Parijs (1997) used the discourse of “mild paternalism” for recognising the issue of paternalism that may be used during the initial implementation of a Basic Income. The discursive theme emerging from these debates (for example Offe, 2008) points to a different form of paternalism generated in the implementation of the universal income grant. The following extract is a typical example:

*What makes the paternalism of a Basic Income less objectionable is the fact that the state does not require any reciprocal obligation. Under a Basic Income, as opposed to categorical welfare ... the paternalism does not erode autonomy. Each citizen is conceived of as receiving her or his entitlement from the common wealth. Equally each permanent resident is considered to be contributing to the common wealth. So the state does not impose obligations on citizens because they are not considered to have obligations to meet. Rather, the state is meeting its obligation to those who are born ... within its territory. (Cited in Tomlinson, n.d., p. 2)*

The next frame demonstrates the discursive formation used to justify the way paternalism would be considered different through the implementation of a Basic Income model:

*The paternalism implicit and explicit in the relationship between the state and its citizens under a universal Basic Income is thus of a very different order from that which exists under a targeted categorical welfare system or a participation income scheme. In these latter schemes the reciprocal obligations which fall upon recipients are defined directly by the state and must be met or the benefit is withheld. (Cited in Tomlinson, n.d., p. 2)*

In these extracts, paternalism under a Basic Income scheme centres on citizenship relationships, as opposed to obligations under duress. The rhetorical device is effective in situating the Basic Income model as an approach that enhances the social citizenship of people with a disability in receipt of disability income support. In direct contrast to the Australian disability income support model, a modest Basic Income grant would prevent the tendency for harsh coercive income support systems based on conservative paternalism.

The Basic Income model is relevant because it does not discriminate across groups and the provision is grounded in social citizenship. This discursive theme makes the proposal a grant based on social citizenship, and free from paternalistic tendencies (Goodin, 1992, p. 207). Disability social theorists, such as Gibilisco (2005), similarly found that a consequence of paternalistic policies and welfare changes was the “welfare divide” which, in turn, generated a climate that has a “less than humane” approach to people with disabilities. For Basic Income advocates, and Gibilisco (2003, 2005) and other disability social theorists (such as Oliver, 2009), including this researcher, an alternative counter-hegemonic income support payment would be based on principles of social citizenship and freedom from paternalism. The Basic Income grant represents one such alternative that counters conservative

paternalism ideology. The model similarly redresses issues of complexity and over-bureaucratisation of disability income support systems.

### **Freedom from the burden of administrative complexity and costs**

The later epochs revealed that the Australian disability income support system was inherently paternalistic, controlling, highly complex and cost inefficient. By contrast, the data indicated that a Basic Income system with no testing of disability categories, means-testing or work activity requirements would go some way to promoting the social citizenship of people with a disability. In addition, a Basic Income would assist in attaining some degree of financial independence. This assumption is supported by the notion that the savings generated from a less complex administration of income support provides one way to supplement such a grant as the Basic Income model. The data also indicated that a universal scheme, such as the Basic Income model would promote a simplified administrative income support system. The following extract was chosen as it represents a typical example of one way to achieve this reduced complexity. The extract from a paper presented by the John Coates M.P. (Member for Denistone) on behalf of the then Minister for Social Security, Bill Hayden at an ACOSS (1975b) conference on universal grant proposals discussed the challenges of a complex income support system. The discourse suggested that one way to redress the issue of complexity is via a universal income support payment:

*[An] advantage of a guaranteed minimum income scheme ... is that it would simplify and standardise our presently confused system of welfare benefits. We all know the problems that arise from the complexity of the various welfare benefit schemes that exist at present, [sic] It is frequently difficult for a person to find out exactly what benefits he or she is entitled to. (Cited in ACOSS, 1975b, p. 6)*

The illustration shows the discursive formation used to justify the way a Basic Income can resolve the complexities associated with targeted income support system in Australia. It does this by presenting the difficulties experienced by people with a disability and then using a discursive frame to demonstrate how this will be achieved:

*It is because of all these difficulties [such as anomalies between payments] that the idea of a guaranteed minimum income has been proposed. The hope of the supporters of such a proposal is that one simple scheme will be found that will. [sic] both cut through most of the administrative tangles of the present programs and provide a basic guaranteed minimum level. [sic] of income for all people in. [sic] Australia. (Cited in ACOSS, 1975b, p. 6)*

Other statements which demonstrate the way a Basic Income model reduces administrative complexity are found in extracts from the Milner (1920) and Tulloch (1979) texts. The Milner (1920) text starts with the frames: “greater simplicity of method” (p. 31) and “one single unit” (p. 22) to convey the notion that a Basic Income scheme could be used to simplify the vast array of payments and benefits. This frame is then supported by the following discursive formation:



*The first result of the Minimum Income scheme would be to take the place of a multiplicity of maintenance schemes now consuming public money, time, and energy, in the attempt to provide for various classes of sick, aged, disabled ... and other [disadvantaged] persons.... The Minimum Income would, in a far simpler way, carry out the objects of many of these schemes and lead to the elimination of the departments and organizations concerned. (pp. 34-35)*

In the above extract, the idea of “one single unit” managing the implementation of universal grants presents a different picture of the complex Australian income support system from the one identified in Chapters Four and Five. The key feature of this statement is that complexity can be removed through the process of incorporating all other income support payments and benefits and the associated departments into one single “unit” and department. The discourse of this extract suggests that highly administrative income support systems, such as the Australian targeted disability income support system, have high costs associated with the monitoring of welfare recipients, in particular the associated costs with determining eligibility.

The discourse of the Tulloch (1979) text points out the relevance of the Basic Income for the Australian context:

*The other advantages of guaranteed income schemes can be broadly identified as (i) improved administration, resulting in (ii) improvements in services to the poor. Administratively, with the merging of the Taxation and Social Security Departments, people would have one account with the government from which they would receive payments.... A person's total situation could then be assessed. (Cited in Tulloch, 1979, p. 146)*

Here, the Basic Income scheme provides a means for reducing administrative costs and increasing economic security (Milner, 1920, p. 23; Standing, 2002, p. 121, Van Trier, 1995). According to the logic of the Basic Income model, this means that a universal grant has several functions, as outlined in the following excerpt: “[the grant] would save on administrative costs because it would simplify the complex schemes, make them more transparent and reduce the amount of intrusive enquiry. And it would reduce poverty and unemployment traps” (Cited in Standing, 2002, p. 212). The discourse also communicates the overall goals underpinning social policy, that is, poverty alleviation through efficient bureaucratic administration.

The next extract shows the ethical justification for a Basic Income scheme: “[an efficient income support system is one which] uses a small amount of resources to achieve its objectives [and] reach ... a high percentage of the target group” (Cited in Standing, 2002, p. 91). Here, it is evident the Australian disability income support system became highly conditional, targeted and overly complex thereby creating a system that is highly marginalising. In turn, the increased monitoring and targeting of people with a disability who are reliant on income support perpetuated conservative paternalism and authority.

In itself this objective of reducing complexity, presents as an ethical justification for the universal grant. The data revealed ethical and pragmatic justifications for a Basic Income proposal as demonstrated in the Lo Vuolo and Raventós (2009) account. The statements contain a rhetorical device that is used to present morals and values as commonsense: *“a BI would ... not only do away with bureaucratic costs but would also foil attempts to reap political and other kinds of gain from the needs of the most defenceless members of the population”* (Cited in Lo Vuolo and Raventós, 2009, p. 7) Here the logic is framed in terms of a commonsense appeal to politicians and the community through the comparison among the targeted disability income support system as bureaucratic and marginalising and the alternative Basic Income as a viable cost efficient response. This principle provides a precondition for an alternative income support system (Gramsci, 1977).

Given these considerations and the underlying principles, the findings revealed that a Basic Income grant can be seen as a legitimate alternative to the predominant paternalistic disability income support system. In considering the disability dimension, a key finding in the data was that the provision of a Basic Income grant would provide people with a disability greater autonomy in determinations around their lives (Casassas et al., 2005; Raventós, 2007; Standing 2004). Thus, it is likely that an advantage of a Basic Income grant is the way the universal grant circumvents the need for the high costs associated with administering complex systems of income support and mutual obligation schemes where means-testing, categorisation and differing obligations require extensive resources (Commonwealth of Australia, House of Representatives, 1988, Tomlinson; Hayden, cited in ACOSS, 1975a; Hayden cited in ACOSS, 1975b, p. 5; Standing, 2002, 2009, 2011). These points concerning administrative complexity highlight the danger of emphasising an income support system that is highly targeted, as in Australia. According to the Basic Income advocates, the difficulty with targeted measures is in the tendency for the mechanism to become highly administratively inefficient, overly arbitrary, and corrupt (Casassas et al., 2005, 2007; Standing, 2002). The emerging discursive theme was the idea that a simplified system leads to greater savings and reduces the propensity for over-bureaucratisation and paternalism.

### **iii. Countering the disablism: Autonomy - On the way to attaining a degree of socio-economic independence**

In the data, the principle of freedom relates not only to choice and self-control, but also to freedom from poverty and financial hardship. The data revealed that a Basic Income grant seeks to counter the disablism by redressing economic insecurity, and providing a modest level of income security. Countering the disablism through autonomy and attaining a degree of socio-economic independence was found in the sub-themes of:

- socio-economic independence; and
- countering the disablism of “plight of the invalid and disabled bludger” ideologies: Freedom from the stigmatising effects of classification.

## Socio-economic independence

The idea that Basic Income provides some means for socio-economic independence is indicated in the accounts of Lo Vuolo and Raventós (2009), Standing (2002), Tomlinson (2000a, 2007a) and Tulloch (1979), who all agree that the grant would go some way to addressing poverty and economic hardship. The data also revealed that similar conclusions were reached in the Henderson Poverty Report in 1975, as the following extract demonstrates: “[such a universal income support scheme] *set at a level sufficient ... [would] make it very difficult to fall into poverty*” (Cited in Commonwealth of Australia, 1975a, p. 73). The concern for addressing the effects of poverty is central to a Basic Income. This is because of the impact on equity, freedom and economic security policy goals:

*Poverty is not only privation, material want and income disparity. It also means dependence on the arbitrary whims and greed of others ... isolation and the social compartmentalisation of the poor. Anyone whose material existence is increasingly unsure also suffers the corresponding erosion of his or her freedom (in the form of ... precariousness ... and outright unemployment without any social protection whatsoever). The erosion of freedom then redounds on the growth of material inequality.* (Cited in Raventós, 2007, p. 21)

In this account, through the discursive formation of “the erosion of freedom” above (Line six, Raventós, 2007), the consequences attached to poverty are made visible to the reader. The portrayal of the negative construction of poverty appeals to the requirement of a socially just alternative based on citizenship. In Epoch Four, poverty was identified as a disabling consequence whereby people with a disability in receipt of disability income support were responsible for their own plight.

A Basic Income model does not perpetuate disablism or generate policy rhetoric that suggests people are responsible for their own situation. In direct contrast to the Australian disability income support system, a Basic Income based on the principle of autonomy assists in preventing the poverty consequence. However, depending on the level at which it was set, a universal Basic Income scheme may not fully redress the propensity for poverty. Yet the measure does provide some basic security as the following extract shows:

*Pensioners [and welfare recipients] would generally be better off financially and ... the working poor, although not receiving a full guarantee against poverty, would obtain some additional security. The minimum payment would provide a floor under incomes which would be particularly significant for those with fluctuating incomes.* (Cited in Tulloch, 1979, p. 150)

Here, the discursive formation emphasises the strength of the economic security principle as a means to secure legitimacy for the Basic Income alternative, even in the instance where a degree of uncertainty is introduced into the debate. Another extract presents a different picture of Basic Income and the capacity for the model to alleviate poverty experiences: “a BI that is at least equivalent to the poverty line would be one element that would help to stave off poverty’s more serious consequences and even to put an end to it” (Cited in Raventós,

2007, p. 6). This account illustrates the extent to which the Basic Income model can respond to the poverty consequences of people with a disability reliant on disability income support. The account also shows the countering the ideology of disablism theme through the discursive theme of socio-economic independence and assisting in poverty consequences.

While the accounts acknowledge that it would take more than just a Basic Income scheme to truly eradicate poverty, a discursive theme demonstrates that the model does assist in redressing the poverty experience in relation to disability income support. This redressing of poverty experiences is found in the following extract:

*Basic Income is a proposal that seeks to eradicate poverty ... it is precisely because eradicating poverty by guaranteeing the material existence of all citizens is a necessary condition for the exercise of freedom. Putting an end to poverty is essential for making people equal.* (Cited in Raventós, 2007, p. 108)

The important claim being made in this extract is that the grant *seeks* to redress poverty, and underlines the true nature of the social citizenship principles. The principle forms a precondition for working toward change and the betterment of the quality of life for people with a disability. This idea as the above account suggests is central to enhancing the material existence of people with a disability and mitigating the effects of economic hardship and poverty. This notion is examined in greater detail in the autonomy theme, as the autonomy principle is closely connected to freedom within the context of a Basic Income proposal. To be an effective strategy, a Basic Income model needs to account for people with a disability who have a long history of being reliant on disability income support, exclusion from the labour market and precarious employment opportunities (Gramsci, 1977).

In line with the socio-economic independence counter-ideology, a Basic Income grant is found to go some way to promote social, cultural and economic freedom. The discursive theme of social, cultural and economic freedom is communicated in this extract:

*[The Brotherhood of St Laurence] ... discovered that poverty ... is not purely an economic one. People become locked into poverty ... through lack of skills ... and information. Any GMI scheme ... must therefore provide more than a monetary handout once every ... year. It must be designed and administered in such a way as to distribute the ... skills or powers [for example power over resources] along with material wealth.* (Cited in Unemployed Workers Movement, 1979, p. 3)

Here, the discursive formation is in stark contrast to the Australian disability income support system. Epochs Four and Five revealed the poverty consequences of disability income support particularly resulting from stringent targeting. The discourse of the above extract shows the connection between the principles, freedom from poverty consequences and attaining socio-economic independence. The discursive theme of autonomy is further exemplified in the connection with the concept of freedom and impact on people with a disability in receipt of disability income support: “*this lack of [real] freedom suffered by the*

*poor, this need to seek the permission of others every day in order to subsist, only exacerbates the next incremental leap in the inequality gap”* (Cited in Raventós, 2007, p. 108). In other words, the claim made in this account is that freedom can only come about with freedom from unnecessary constraints, regulatory controls and material disadvantage.

There is some evidence that a Basic Income totally abolishes the poverty traps and financial disincentives present in the current Australian targeted disability income support system. The next extract, drawing on findings from a micro-simulation model, demonstrates this assertion of abolishing poverty traps:

*[It was found that a] Basic Income ... proposal ... seeks to eradicate poverty. However ... if this is a goal to be pursued it is precisely because eradicating poverty by guaranteeing the material existence of all citizens is a necessary condition for the exercise of freedom. Putting an end to poverty is essential for making people equal ... equal in the more precise sense of being reciprocally free ... by having the means of material existence.* (Cited in Raventós, 2007, p. 108)

Here, the discursive theme of preventing poverty traps points to the way a Basic Income can improve the material existence of people with a disability in receipt of disability income support. Similar conclusions from research were reported by ACOSS (1975a, 1975b), Brotherhood of St Laurence (1980), Commonwealth of Australia (1975a, 1975b), and Tulloch (1979).

Rhetorical devices were used in previous articles by Tomlinson (1992). In the Tomlinson (1992) account, he drew on data from ACTCOSS (1991a, 1991b, 1991c), to make the claim: *“those who require income support need it precisely because they don’t have funds”* (p. 9). This representation put the argument for a Basic Income model in terms of the principles of social citizenship and need, rather than ideological judgements that suggest assumptions of deservingness and idleness. The discourse of need underpinning the excerpt highlights that disability income support is required to prevent financial hardship, as opposed to issues of idleness. As with the findings in Chapters Four and Five, the following extract highlights the financial hardship experienced by people with disability in receipt of disability income support: *“it is difficult for people with disabilities on income support to make ends meet, let alone afford the additional and often unfunded costs of participation (transport ... medicines). The same applies to many people with disabilities in jobs”* (Submission by Brotherhood of St Laurence to HREOC, 2006). Thus, in view of the limited economic independence and therefore material disadvantage of many people with a disability, the discursive theme of socio-economic independence points to the increased need for financial security and service support to attain an adequate standard of living (for many people with a disability). The above illustration shows that without economic means, adequate income support provisions or access to employment opportunities, people with a disability are at risk of extreme financial hardship (Brotherhood of St Laurence, 2003; Gibilisco, 2003; Saunders, 2006, [SPRC]).

An extract from A. McDonald (2000) makes visible the financial security assumptions identified in the commentator's use of the socio-economic independence discourse:

*Without doubt the feature that contributes most ... is the lifelong financial security of the universal income support. Taking as an example the proposal for a Support Income for Australia, this financial security is provided by an individual income which is free of tax, free of means test and for an adult sufficient to maintain a basic standard of living. This is a level of financial security which is simply not achievable within the limitations of a means tested income support system. (p. 2)*

Here the account suggests that adequate socio-economic security is the foundation for attaining real freedom and autonomy. This theme of socio-economic security and independence was consistently identified in the texts of Standing (2009), Tulloch (1979), Unemployed Workers Movement (1979), and Van Parijs (1997, 2002). The key claim is found in the idea whereby the principle affirms that for disability income support policies to counter the ideology of disablism, the policies would need to contribute to reducing the insecurity of people with a disability while not imposing any obligations on them (Gibilisco, 2003; Standing, 2002, 2005, 2009; Tulloch, 1979; Van Parijs, 1997, 2002).

An alternative in the form of a universal income support policy would promote the autonomy of people with a disability to pursue liberty and self-determination, given that the targeted measures are grounded in conservative paternalism and non-egalitarian principles (Raventós, 2007; Standing, 2002, 2004). For example, an extract makes clear the underpinning principles of socio-economic independence and the capacity to attain greater skills through a Basic Income scheme: *"possibly the most significant feature of universal income support is the ability to develop individual self-determination and independence, in contrast to the welfare dependency created by means tested income support"* (Cited in A. McDonald, 1995, p. 8). Similar conclusions of the need for greater socio-economic independence and security were made in the Milner (1920) text: *"any approach to regularity of income and general security has a tendency to promote steadiness, hopefulness, thrift, and healthful absence of worry and fear"* (p. 118). Here the discursive frame supports the social and economic freedom principle given the propensity of the Basic Income scheme to reduce fear and promote self-autonomy.

The experience of financial hardship under a targeted disability income support system found in Epoch Four reduces the capacity for people with a disability to attain socio-economic independence. In view of the propensity for limited economic independence and therefore material disadvantage, there is an increased need for financial security in order to attain an adequate standard of living for people with a disability. The propensity for people with a disability receiving a disability pension to experience poverty has been widely documented by policy analysts (Commonwealth of Australia, 1975a, 1975b; Jordan, 1984, Saunders, 2005a, 2005b, 2005c, [SPRC]) and disability social theorists (Barnes & Mercer,

2003; Clear & Gleeson, 2002; Gibilisco, 2005; Oliver, 2009). The findings from the Basic Income data indicated that the provision of a Basic Income above the poverty line is one way of remedying this experience of poverty.

### **Countering the disablism of “plight of the invalid and disabled bludger” ideologies: Freedom from the stigmatising effects of classification**

Countering the disablism of “plight of the invalid” and “disabled bludger” ideologies was identified in the notion that a Basic Income that is universal would not be stigmatising to people with a disability. Nor would a Basic Income reinforce disablist principles. The data revealed the capacity for a Basic Income to at least remove the stigma of disability, a brand name with which few want be associated. The following extract was chosen as it represents a typical example of the propensity of the Basic Income model for reducing the stigmatisation of particular groups in receipt of a pension, including the disability pension:

*At the same time accessibility would be greatly increased and stigmatisation reduced. Everyone becomes eligible for payment under a guaranteed income scheme, and take-up is automatic in most cases.... the ‘automatic ... guarantee of an income’ does not ‘consign beneficiaries to second class citizenship’ ... [whereas] the personalised social services carry an inherent risk of stigmatisation.* (Cited in Tulloch, 1979, p. 149)

In this account the potential for stigmatisation on the basis of disability classification is removed through the provision being paid to all persons. The discursive frame shows that social citizenship is greatly enhanced under a Basic Income scheme. Thus, a Basic Income grant would potentially eliminate the tendency for all people with a disability to be stigmatised through categorisations of disability.

The significance of the claims is that there would be no stringent eligibility criteria on the basis of disability classifications as a qualifier for receiving income support. Whereas the Australian targeted approach of disability income support generates categories based on notions of capacity and ability as a condition of citizenship, it was found in the data that a Basic Income grant is unconditional and a form of guaranteed minimum income. For example, the following extract depicts the way advocates of Basic Income construct the grant in terms of being free from stringent controls: *“the [universal] support incomes are unconditional, and this characteristic alone frees the system from any political or ideological pressures. This system engenders freedom and self-determination, whereas politically or ideologically driven systems ... support conformity and regulation”* (Cited in A. McDonald, 2000, p. 2). Here the proposal for a Basic Income, through its defining principles of the grant being unconditional and in a sense, a right of citizenship, rejects conditionality based on disability dimensions. Thus, under a Basic Income scheme, people with a disability are considered citizens in their own right (Barnes & Mercer, 2003; Clear & Gleeson, 2002; Gibilisco, 2003, 2005; Oliver, 2009).

An important conceptual distinction is the way that the dominant Australian disability income support policy responses across the epochs stigmatised people with a disability. The themes of Commonwealth authority and conservative paternalism demonstrated in the notions of deserving and undeserving poor, welfare dependents and bludgers on the system, operated to stereotype people with a disability in receipt of disability income support. Chapters Four and Five revealed the way policy images influenced public perceptions through the use of representations that communicated particular values and beliefs about people with a disability in receipt of disability income support. The images generated then function as a rhetorical device to perpetuate assumed “commonsense” stereotypes about vulnerable groups (such as people with a disability) which, in turn, result in stigmatisation. Another discursive frame makes visible the counter discourses to stigmatisation and disablism: “*the just forms of security are those that undermine discrimination [and stigmatisation] by strengthening fraternity and a sense of community*” (Cited in Standing, 2002, p. 238). This excerpt highlights an important implication for people with a disability reliant on disability income support. The idea points to the notion that under a universal scheme, people with a disability would no longer be targeted as a separate group category (Tulloch, 1979).

Similarly, the above discursive frame illustrates that with a Basic Income scheme, disability pensioners would not be subject to income support policy-making that stereotypes according to classifications of disability. For example, the Henderson Poverty Report (Commonwealth of Australia, 1975a) shows how the ideology of disablism is countered and stigmatisation is removed: “[An alternative to targeted measures] *involves extending social security entitlements to the whole population, [sic] and not merely to those who are in the special categories, and so introduces fundamental change*” (p. 68).

Another discursive formation revealed that the only way to redress the inequities within the disability income support system was to move beyond “piecemeal reforms” and transition to an alternative system that provides for all citizens (Commonwealth of Australia, 1975a, 1975b). The following account found in the Henderson Poverty Report showed that reformist-based policy change operates to generate classifications and further categories, which in turn entrench stereotypes:

*Such [reformist] proposals would ease the lot of particular groups without removing the fundamental criticism. A thoroughgoing attack on the inequities present in categorisation would not succeed through the invention of more categories, it would rather try to reduce the gap between those who are in the favoured categories and those who are outside.* (Cited in Commonwealth of Australia, 1975a, p. 68)

This extract illustrates that unlike the Australian targeted disability income support system, a Basic Income with an emphasis on citizenship and the provision to all citizens, precludes the necessity for harsh conditions, tight targeting and classifications according to disability



dimensions. This idea is also presented in the next extract, which suggests that under a Basic Income grant, people with a disability would be treated equally:

*Basic Income does away with the 'social failure' stigma that many people associate with the fact of receiving any kind of poor relief because every citizen would receive a Basic Income and therefore nobody is 'marked' by the fact of receiving it.* (Cited in Raventós, 2007, p. 126)

Here, the account reveals the way the universal, unconditional grant prevents associations between disability and dole bludgers on the basis that all citizens receive the grant without obligations attached to the payment. The benefit of a Basic Income is that the grant presents as a highly relevant alternative for countering the ideology of disablism, as seen in this excerpt: “[Basic Income is] *a just way of distributing income towards the more vulnerable groups without causing stigmatisation*” (Cited in Raventós, 2007, p. 8). The frame is extended to show how this can be achieved: “*Basic Income totally eliminates the blight of stigmatisation. Since it is a universal right for everyone and only conditional on citizenship ... there can be no stigma because everyone receives it*” (Cited in Raventós, 2007, pp. 21-22). In this example, the discursive frame highlights the way a Basic Income grant based on universalism has the power to transform policy rhetoric from plight of the invalid and disabled bludger to the “blight of stigmatisation” and eliminating stigmatising effects (Gramsci, 1977). The policy language of Basic Income reframes disability income support and counters the stigmatising effects of language used in targeted approaches, such as the Australian disability income support system. The precondition of social citizenship underpinning Basic Income is the precipitator for effecting change and challenging the ideology of disablism (Gramsci, 1977).

Disability social theorists, such as Gibilisco (2005) make similar conclusions about the effect of stereotypes and stigmatisation. The following extract communicates the impact of stigmatising effects of individual-functional, medical and charity theories underpinning Australian disability policy, particularly in respect to disability income support: “*the holders of such stereotypical views ... assume a less than adequate cognitive response and presume what people with disabilities can and cannot do without assistance. Such stereotypes create barriers to life's fundamental aspirations towards betterment, namely employment*” (Cited in Gibilisco, 2005, p. 193).

Across the epochs, the classification of people with a disability in receipt of disability income support, from its original eligibility requirements to the tightening of eligibility criteria, has had a profound effect on the language of disability income support and idea of social protection. Chapters Four and Five demonstrated that there is an ever-growing divide and inequality between disability pensioners and the so-called working populace. Similar findings were evident in the Basic Income data (such as Standing, 2002 and Tulloch, 1979). Here, the findings revealed the divide between people with a disability and in receipt of disability

income support and their exclusion from the labour market has important implications in terms of their citizenship.

The ideology of disablism demonstrated in the Australian disability income support system constructed invalidity and disability as the central requirements for receiving a disability pension. By contrast, the findings from the data in this section revealed that the Basic Income grant avoids the need for disability to be measured and proven in relation to standard income support. The theme of countering the disablism found that a Basic Income proposal does not generate classifications on the basis of disability, rather the provision occurs on the basis of social citizenship. A key feature emerging from the data was that a Basic Income has no stringent eligibility criteria, apart from citizenship (Raventós, 2007), as the basis of disability categories as a qualifier for receiving income support. This was in direct contrast to the Australian income support system for people with a disability which reinforced disablism through the categorisation of disability pensions from other payments. Further, the analysis of the Australian disability income support system across the epochs found that it generates categories on the basis of “ableness” as a condition of citizenship. The way disability is constructed in income support policies and tied to conditionality is critical feature for the Basic Income model as the grant is unconditional and a form of guaranteed minimum income (Gramsci, 1977; Lo Vuolo & Raventós, 2009; Raventós, 2007).

## **Section Summary**

In this section, the findings revealed that under a Basic Income, citizenship is a pre-condition for income support, rather than classification and categorisation. Countering Commonwealth authority and power of the State was found in the themes of social citizenship as a requirement, not conditionality; freedom from regulatory control and classification of disability; and income support provision on the basis of citizenship rights, not a proven disability. Countering conservative paternalism, from paternalism to citizenship was revealed in the themes, freedom from paternalism and freedom from the burden of administrative complexity and cost. Countering the disablism, autonomy, on the way to attaining a degree of socio-economic independence was found in the socio-economic independence and countering the disablism of the plight of the invalid and disabled bludger ideologies, freedom from the stigmatising effects of stigmatism themes (Gramsci, 1977). From this exploration, a Basic Income would promote the social citizenship of people with a disability, not only in the workforce, but also in day-to-day life. Basic Income has the potential for breaking down dominant ideology and established “truths” associated with disability income support and present a new worldview grounded in social citizenship (Gramsci, 1977).

The next section describes the intellectual challenges relevant to the Basic Income proposal and non-disablism.

### 7.3 Intellectual Challenges Relevant to the Basic Income Proposal and Non-Disablism

As the findings in the previous section suggested, a Basic Income presents as a useful model for enhancing the social justice and citizenship of people with a disability in relation to income support policy. However, even with the best of intentions by policy-makers and academics, as in any income support model, there are inherent intellectual challenges. This section outlines the four main areas which need to be addressed. These intellectual challenges comprise:

- *Basic Income addressing one aspect of disablism: The least oppressive form of income support*
- *Basic Income as a disincentive: Impact of the incentive/disincentive dichotomy*
- *Practicalities and design: Tailoring the model within the Australian context*
- *Basic Income: Not a utopian panacea*

It is not the researcher's intention to examine the complexities of the Basic Income model (such as ecological or trade systems issues) that remain outside of the boundaries of the scope and purpose of this thesis. Rather, it is to examine some of the main intellectual challenges that emerged from the Basic Income data.

Social policy analysts need only to examine the literature on the current debates surrounding the Basic Income model to understand the complexities associated with the design and implementation of such a scheme. Any alternative model of income support for people with a disability, based on non-disablist principles and promoting social citizenship, needs to demonstrate the capacity to be critically evaluated. This requirement is found in the discursive frame:

*Social democratic theories [and policies] should not be free from the constant assessing of its policies. Such assessment is required to analyse the ongoing capacity of social democracy to meet the requirements it was originally put in place to meet. (Cited in Gibilisco, 2005, p. 82)*

An extract by the then Minister for Social Security, Bill Hayden (Cited in ACOSS, 1975b) demonstrates the discursive formation in debates exploring alternative disability income support schemes. For Hayden, an alternative such as the Basic Income proposal needs to be administratively, financially, legally, politically and socially feasible:

*The welfare proposal that I would most like to see is the one that does more to alleviate poverty than **our** present social welfare system but which costs less!*

*The need to be realistic, then, will be an important criteria of **any** guaranteed minimum income plan. But there are other, more specific [technical] difficulties attached to most of the programs that have been, proposed.... **As** a general rule, if one cannot come to terms with the technical problems, the scheme (whichever*

one it is that is **being** discussed) will soon be seen as unrealistic [emphasis in original]. (Cited in ACOSS, 1975b, p. 11)

The discursive frame of the above extract points to two ideas: the first insight infers that for such a scheme as the Basic Income grant to be considered, there needs to be criteria in which the government in power applies to assess its relevance. The next insight considers the notion of “costs less” which is often a term used to reject the introduction of universal income support. Debates often argue that a Basic Income grant would not be economically feasible (Raventós, 2007). Therefore, a critical examination of conceptual complications was required to uphold the logical trustworthiness of such a proposal. It is for this reason that an exploration of some of the challenges of the Basic Income proposal is undertaken in the following section.

### **Basic Income addressing one aspect of disablism: The least oppressive form of income support**

Disablism is a complex phenomenon. There is no one expression of disablism at any given time as it is reflected across differing structural representations, including social practices and institutional arrangements. Thus, a Basic Income model would not address every facet of “disability as oppression” (for example, disability discrimination, or exclusion from education). In this sense, the present study considers disablism as it relates to disability income support policy within Australia. While Basic Income is a useful model, it will never be a utopian panacea to address all components of disablism – nor should it (Tomlinson 2006b). For example, the following extract draws out the relevance of this idea: “*just because a main mechanism of our oppression is our exclusion from social production, we should be wary of drawing the conclusion that overcoming this oppression should involve our wholesale inclusion in it*” (Cited in Abberley, 1999, p. 12). The next extract multi-dimensional nature of disablism:

*For impaired people the overcoming of disablement whilst immensely liberative would still leave an uneradicated residue of disadvantage in relation to power over the material world. This in turn restricts our ability to be fully integrated into the world of work in any possible society.* (Cited in Abberley, 1999, p. 14)

Here, the discursive formation points to the idea that redressing the consequence of disablism in one area of disability policy, such as income support, does not automatically lead to disablism being addressed in other policy areas, such as work or education. Thus, what is required is a transformative strategy as disablism is interconnected with other forms of oppression, such as racism and sexism (Gramsci, 1977).

Although under a Basic Income scheme there would be no testing for income support, this does not preclude the need for other social support services based on need if extra assistance is required (for example, health and education, or independent living). An

examination of the Basic Income data revealed the debates on Basic Income proposals whereby concerns were raised that once such a scheme is implemented, then other social services will be withdrawn or significantly reduced (ACOSS, 1976; de Wispelaere & Stirton, 2004; Goodin, 1992; Harvey, 2004; Tulloch, 1979). For example, one extract indicated: *“the introduction of the GMI [Guaranteed Minimum Income] scheme would introduce a ‘locking in effect’ which would impose undesirable restrictions on both future demand management and future redistributive policies”* (Cited in Saunders, [SPRC], cited in Tulloch, 1979, p. 151). In counter to this, the discursive themes in the Basic Income data indicated that other welfare policies and support services, such as health, education and employment, are required. The next extract uses a discursive formation to argue that a Basic Income grant needed to equate with additional supports to ensure people with disabilities could maintain an adequate standard of living: *“[a Basic Income] must be individual and equal, with supplements”* (Cited in Standing, 2009, p. 300).

Indeed, during the 1970s, similar conclusions have been reached by the Priorities Review Staff:

[A Basic Income proposal] *does not rule out completely the need for assistance in kind. Some commodities may not be available through the private sector to all who need them.... Government provision of education and housing can be partially justified on these grounds. Society’s wish to ensure minimum levels of a number of specific ‘necessities’ such as food, shelter and clothing, may be a further argument for in-kind benefits.* (Cited in Commonwealth of Australia, 1975c, p. 12)

According to this account, a Basic Income can only address the question of standard income support, thus other formalised support services are required. The data indicated that some Basic Income advocates (ACOSS, 1975b, Milner, 1920; Raventós, 2007; Tomlinson, 2006b) have recognised the need for other services, such as housing and education. Just as Master Davis in Heinlein’s (2004, pp. 143-144) fictional account acknowledged, there would have to be health and other community services in addition to a Basic Income. The ACOSS (1976) policy document identified that full poverty alleviation would not occur solely through a Basic Income because of existing inequalities. Different discursive frames in the data highlight that under a Basic Income proposal other forms of material resources, social supports and awareness campaigns were required. This notion is found in phrases such as: *“the poor will still need other services”*; *“an adequate income guarantee will not do away with the need for special benefits”*; *“additional support may be required in some areas because all people are not equal”*; and *“there is no getting away from the necessity of services of various orders”* (for example social services or housing services) (Cited in ACOSS, 1975a, 1975b, 1976).

The idea that several supports were required because of inequalities is also found in the Raventós (2007) text: *“confronting the immense inequalities that mean an absence of freedom ... requires other measures”* (p. 190). Where different orders of discourse are

applied in an earlier section of the Raventós (2007) text, the essential meaning stays the same: *“anyone who suffers from some kind of disability ... will not enjoy the same opportunities to do what he or she might like to be able to do as somebody who has been physically blessed by the natural lottery”* (p. 42). Thus, an emerging discursive theme is that a Basic Income model cannot address all structural and social problems or the need for a range of service responses, and nor should it. An additional point to be gleaned from the data is that other disability grants may be required for independent living and necessitate some form of eligibility criteria. However, eligibility criteria and testing under this notion would be tied to impairment, rather than disability. Disability social theorists, such as Oliver (2009) and C. Thomas (1999, 2004a), emphasise the importance of using the term impairment, as opposed to disability, given the disabling nature of the category “disability”. This is because of the historical connection between disability, capitalism, productivity and ability, which operates to oppress people with a disability (Gramsci, 1977).

That data also revealed the way debates concerning Basic Income grants were criticised (by writers such as Harvey, 2004) for not redressing to all aspects of injustice or oppression. Often these debates were couched in terms of social reforms, that is, the implementation of a Basic Income scheme within the existing unequal structures of society. For example, the following extract highlights this discursive frame of reformism: *“it goes without saying that, with a Basic Income or without one, the capitalist system will continue to be the capitalist system”* (Cited in Raventós, 2007, p. 190). This extract reveals the social relations of power and ideology and illustrates that a Basic Income would be implemented within society that is part of the political economy of capitalism. Thus, where the broader system remains the same, it is the income support system that will be different, and more egalitarian.

The suggestion that not considering a Basic Income because it does not address every aspect of disablism, ignores the reality that universal income support can provide people with other freedoms and power: *“what is true of a Basic Income is that it can change situations that constitute a major part of capitalism’s characteristic features ... [such as] more freedom for a good part of the population”* (Cited in Raventós, 2007, p. 190). Thus, where a Basic Income scheme is relevant is in the model’s capacity to produce the initial social conditions and social forces necessary to enhance the lives of disability pensioners (Gramsci, 1977). These social conditions function to challenge outmoded truths (ideology of disablism) by providing the space for alternative thinking around income support (Basic Income grant) and social service provision, which in turn becomes a step toward constructing an egalitarian society (Gramsci, 1977). A Basic Income model established as an alternative strategy has the propensity for transformative change. This type of transformative change is different from the “reformist” and passive revolutionary change which reinforced disablism ideology and typified the epochs under the Australian targeted disability income support system.

Contra is the Unemployed Workers Movement (1979) who proposed a three-tiered implementation of universal income support to ensure people at the grassroots also had control over resources and increased participation in decisions-making. In doing so, they sought a way to respond to issues of injustice under the capitalist system and propose a socialist method. The findings indicate that where a Basic Income proposal may not address every form of oppression and disablism, the grant is a highly relevant alternative.

The findings also suggest that implementing a Basic Income grant in relation to people with a disability requires a new way of thinking about the concept of disability. Traditional outmoded ideas in which disability is categorised as solely an individual problem, fails to acknowledge the structural barriers encountered by people with a disability in daily life. By drawing distinctions between able-bodied and disabled citizens, the danger is in maintaining the very oppressive structures that attempt to be addressed through an alternative model, such as the Basic Income proposal (Gramsci, 1977). Both the advocates (such as Raventós, 2007) and critiquing writers (such as Harvey, 2004) noted that the Basic Income model needs to be legally, economically, politically and administratively pragmatic in order to prevent over-bureaucratisation and resistance (ACOSS, 1976; de Wispelaere & Stirton, 2004; Harvey, 2004; Raventós, 2007; Standing, 2002, 2009). Each presented a discursive frame that suggested a Basic Income proposal requires preparation particularly in the management of information to the public (ACOSS, 1976; de Wispelaere & Stirton, 2004; Raventós, 2007; Standing, 2002, 2009). This idea aligns with a transformative strategy for disability income support (Gramsci, 1977). The findings indicated that a Basic Income can change the system of income support, but for a society to become socially just requires changes in attitude (ACOSS, 1975b).

### **Basic Income as a disincentive: Impact of the incentive/disincentive dichotomy**

Although it can be seen that the Basic Income proposal represents an appropriate alternative to the Australian disability income support approach, another ideological challenge in implementing the grant concerns the incentive/disincentive dichotomy. The McKay (2005) text pointed out the difficulty of using the incentive argument in Basic Income debates: “[the] *privileging of the capitalist model of economic organisation inherent within the traditional economics approach to social policy produces equally limiting theoretical justifications for publicly supported income redistribution schemes*” (p. 24). The discursive formation infers that when writers simultaneously uphold some of the tenets of Basic Income, yet subscribe to that of incentive, the debate reinforces the notion that some form of incentive is required to ensure people engage in work. This incentive argument can be found in the works of A. Atkinson (1996) who argued for participation income as did Cass (1995) and Cowling et al. (2003).

Mitchell and M. Watts (2004) and M. Watts (2002), in their critiques, put forward a case for job guarantees. These arguments suggested that income support provided by the Commonwealth would be a disincentive to an individual's labour market activity and thus, the overall economic situation of that society (McKay, 2005). The following extract draws attention to the tenacity of the work ethic ideology, which is a common discursive frame in the argument for the incentive principle: *"such schemes [Basic Income model] seem likely to have consequences for incentives to work and save which make it impossible to consider them seriously"* (Taxation Review Committee, cited in Tulloch, 1979, p. 152). In this account, such forms of citizenship are connected to economic ideals, productivity and meaningful work. That is, a productive citizen is one who is employed in the labour market, subsequently reinforcing the incentive/disincentive dichotomy and entrenching the oppression of people with a disability. Adopting the productive citizen stance establishes connections between what constitutes a good citizen and economic ideals, and highlights distinctions between those assumed to have the capacity to work (able-bodied) and those perceived to be unable to participate in work (disabled). Disability social theorists, such as Russell (2001a), Oliver (2009) and C. Thomas (1999, 2004a, 2004b), challenge the usefulness of able-bodied/disabled dichotomies that underpin disability income support policy.

The Basic Income data indicated the importance of considering the incentive/disincentive argument. Various counter-responses (such as Tulloch, 1979; Van Parijs, 2002) to the disincentive argument contended that the argument has no validity. For example, the following extract questions the validity of the incentive ideology: *"this general argument is not convincing. Available evidence suggests that disincentive effects of cash assistance to full-time workers is small"* (Cited in Commonwealth of Australia, 1975c, p. 11). The next extract using findings from the Brotherhood of St Laurence income supplement project reveals how little change occurred to the work ethic principle when people were provided a Basic Income supplement: *"[the project found that] despite the low wages and poor working conditions, the men prefer[ed] to work ... [and the provision generated] no significant change in the men's employment pattern"* (Cited in Tulloch, 1979, p. 152). This illustration highlights that even when a form of Basic Income was implemented in a project, the grant did not function as a disincentive to work. The discursive formation also exemplifies the fear rhetoric generated by conservative proponents who argue against a Basic Income grant.

A similar finding was demonstrated in a Basic Income pilot project in Namibia, Africa. In a report by Haarmann et al. (2009) the researchers found that a Basic Income grant provided an opportunity for economic freedom, rather than promote idleness:

*I would like to put the concerns that a BIG [Basic Income Grant] could create dependency and a culture of laziness into a theological context: Before the pilot project started, opponents said that if you give people money, and especially poor people, they will sit down and become lazy.... The results of the research presented here, refute this claim.... In Namibia ... the BIG, like the manna, is freeing people to move and take ownership of their economic affairs.... We have*



*seen this in Otijivero-Omitara. Look at Frida Nembwaya, who, when receiving the BIG, started to bake traditional rolls for just N\$1.... People in Otijivero-Omitara now have the money to buy from her. She currently considers to extend her shack and wants to employ somebody. She also added a small braiding business and sells local sausages and recharge vouchers for cellphones. (p. VII)*

In this account, the Basic Income grant functioned as an “incentive to work”, and goes some way to dispel the myths surrounding the need for incentives.

Milner (1920), one of the earliest advocates of Basic Income, addressed this very point at considerable length (Van Parijs, 2002, similarly explored the issue in detail). In the Milner (1920) account, quantitative data was used to argue against the disincentive discourse: “*it is claimed that the Minimum Income proposal will still leave the economic motive and the credit which attaches to success as the chief incentives to productivity*” (p. 99). As disability social theorists, politicians and the media have identified, people with a disability have been subject to exclusionary policies, through no fault of their own and that they often welcome the opportunity for increased participation in all aspects of society, including employment.

The Raventós (2007) text also revealed that the need for incentives may not be fully supported by wage-earners themselves. In his text, a common critique of Basic Income is the assumption that “parasitism” will result if no incentives are applied (Raventós, 2007, p. 181). This discursive frame of parasitism is precisely the argument used by governments throughout the history of the Australian disability income support system (Tulloch, 1979). For example, government rhetoric in Epoch One (concern for idleness and malingering) and across the other epochs (genuinely worthy of an invalid pension, inadequate invalids and the disabled bludger construction), which promoted these issues of disincentives and reliance on income support in terms of welfare dependency, even though a person may possess the desire to work (Burke & Redmond, 2000; Commonwealth of Australia, Senate, 1991c, p. 4272, Lees, SA, Australian Democrats; Gibilisco, 2005; Tomlinson, 2001a). The next extract shows the discursive justification for discounting the incentive argument: “*a lot of workers who have taken early retirement, which is offered by many big companies that want to cut back on staff, continue to engage in remunerated work even though their economic circumstances are quite enviable*” (Cited in Raventós, 2007, p. 182). Here, this statement points to a contradiction in the disincentive argument whereby, for example, people who have undertaken voluntary early retirement as a result organisational retrenchments often return to the labour market. Thus, the incentive argument ignores the reality that people have the desire to continue working even in the instance that a Basic Income was implemented.

The hegemony of the incentive discourse operates to preserve conservative and neo-liberal ideology and the existing social order. In turn, the incentive discourse helps to secure credibility and legitimacy and prevent alternative strategies such as the Basic Income grant. In part, the incentive discourse secures hegemonic dominance through the use of

Commonwealth authority and regulatory control discourses. Proponents of the incentive argument (such as the Howard Government in Epoch Four) have often claimed that employment provides a platform for valued social participation in society. Discursive themes in the Gibilisco (2005) text indicated that regulatory control and concern for incentives, alongside the pre-eminence of economic policy was a form of disablism. This strong link between incentives and the oppression of people with a disability is evident in the following extract:

*Again, profit maximization dominates over ideas of social inclusion in the decision making of corporations. Here, we see the ... dynamics of neo-liberalism at work, as employers seek to exploit labour ... searching for cheap labour wherever it is located and being supported by the neo-liberal ideology of non-intervention in the market. (Cited in Gibilisco, 2005, p. 146)*

In a similar vein, Milner (1920) viewed the harsh targeting of so-called “slackers” through the use of coercion to be punitive: “[it is] *absolutely ineffective ... you cannot starve men [sic] to make them work*” (p. 86).

The Basic Income grant represents a counter-ideology to the incentive argument, particularly in instances whereby the notion of incentives and participation is at odds with high employment rates and harsh labour markets. The Basic Income model challenges the relevance of work incentives and employment as a necessary means for increasing social participation, particularly by people with a disability in receipt of disability income support. The following extract uses the discourse of occupation to counter the ideology of incentives and “idealisation of jobs”:

*Most people in most societies have been obliged to labour in narrow jobs that give them little scope for ... development of their competencies. Jobs are always dead end. What we need to do is rescue the idea of occupation, where this means development ... of competencies in a “career” of working. A job is what one does, an occupation is what one has become or is becoming. (Cited in Standing, 2002, p. 247)*

In this account the preferable language to apply under a Basic Income would be “occupation”. A Basic Income model establishes occupation as the signifier given that it is closer to socially just principles of meaningful choice of occupation, freedom from control and full employment policies (Gramsci, 1977). An important implication emerges for people with a disability. If people with a disability have long been subject to precarious employment or short-term and low-waged jobs, then given these historical antecedents, it is difficult to see how a Basic Income would act as a disincentive to finding work.

As such, a Basic Income model presents as a useful measure for transitioning into work. An excerpt illustrates the implications of the transitioning to work measure under the Basic Income proposal: “*there is an alternative approach to income support: that of Basic Income which, if implemented ... result[s] in a more equitable sharing of paid work, civil activity and*

*leisure without inhibiting productivity*" (Cited in Tomlinson, 2001b, p. 36). Here, the Basic Income strategy is useful for promoting full-employment policies and labour market programs with training supports. This strategy helps to mitigate any negative effects of employment policy, and operates as a supplement to socially just income support. Thus, as the excerpts exemplified, Basic Income provides a model for socially just income support and as a counter-ideology to the incentive argument.

### **Practicalities and design: Tailoring the model within the Australian context**

The Basic Income data revealed that, in reality, a Basic Income grant is just that: a transformative and inclusive category that aims to redistribute wealth and prevent people with or without a disability from descending into poverty. The unconditional grant is an allocation of an income set at a modest level, and assists in ensuring that the basic needs of all citizens are met (Casassas et al., 2005). Feasibility arguments and economic analyses are used by critics to oppose proposals which are in support of introducing a Basic Income scheme. Van Parijs (2000), Raventós (2007), Standing (2002) and Van Trier (1995) recognise that normative critiques of the Basic Income proposal tend to be based on justifications of non-affordability and cost efficiencies. The affordability discourse functions to maintain the targeted Australian disability income support system and prevent alternatives, such as Basic Income from replacing such a scheme (Gramsci, 1977). These criticisms are inherently ideological in basis. There is some evidence in the Basic Income data that a Basic Income is economically viable. For example, the Standing (2002) text makes the claim that financing a Basic Income is achievable, as shown in the following extract: "*not only is [a Basic Income] affordable at this rate [standard income tax rate of 35 per cent], but it is moderately progressive*" (p. 212). Similar proposals and practical design considerations have been proposed across differing countries, such as Ireland (Reynolds & Healy, 2004) and Spain (Fernandez, 2002; Pinilla-Pallejá & Sanzo, 2004), and explicitly reject affordability arguments as ideological.

In countering the affordability discourse, the Milner (1920), Van Parijs (2000) and Van Trier (1995) texts present examples of sustainable models in terms of financing a Basic Income scheme. Similarly, the Raventós (2007) text uses a micro-simulation model applied in relation to Catalonia, Spain. The micro-simulation model is a means of demonstrating evidence of the feasibility of the Basic Income model that can be applied across different countries. The findings of the study revealed the economic viability of the Basic Income scheme as the income distribution rate was highly progressive. The following extract demonstrates the capacity for a Basic Income to be achievable: "*the savings in social expenditure estimated for Simulation 1, which is for an annual Basic Income of €5414 for adults and €2707 for minors [approximately €451 per month, including the savings generated which equated to €9,249]*" (Cited in Raventós, 2007, pp. 160). Clearly, even with

complexities of the simulations (such as not counting non-taxpayers), there is some evidence of the feasibility of the Basic Income proposal.

The next extract depicts a discursive frame made about the viability of Basic Income:

*[From the conclusions drawn and accounting for exceptions] ... it means that our micro-simulation model will tend to underestimate the progressiveness of the redistributive impact of the reform on the total population inasmuch as it only takes account of the sample of taxpayers.... If the model ... predicts much more egalitarian income distributions after the reform, then we can readily assume that the real resulting distribution would be still more progressive when it includes the poorer population not covered by the sample. (Cited in Raventós, 2007, p. 162)*

In this statement, even where there are limitations in the micro-simulation, the Basic Income proposal was found to have a progressive redistribution effect, central to an egalitarian form of income support for people with a disability. In contrast, not all research projects, such as the Commonwealth of Australia (1975a, 1975b), have reported such findings. In an extract from the Saunders (1987, [SPRC]) policy document, the discursive frame points to the cost restrictions and ideological features which functioned as barriers to the implementation of universal income support in Australia:

*Considerations of cost prevented the Poverty Commission from recommending a full non-categorical GMI scheme which would set the GMI payments for all above the poverty line. The tax rate required to finance such a scheme was estimated to be about 50 per cent. The GMI proposal preferred by the Commission was a two-tiered arrangement, with a lower GMI payment for those not eligible for pension or benefit, and a poverty line payment for those in the eligible categories. This scheme thus maintained the principle of categorisation and the implied eligibility tests required to administer it. The tax rate implied by this two-tier proposal was 40 per cent. (p. 7)*

In this account and in a similar vein to the parliamentary speeches within the Tulloch (1979) text, political will operated to prevent the introduction of a Basic Income. The Commonwealth Government continued to rely on conservative paternalism ideology and categorical measures for people with a disability reliant on income support. This is also demonstrated in the above rhetorical frame: “two-tiered arrangement” (Line five, Saunders 1987, [SPRC]).

Clearly, the ideological basis of the Australian disability income support system has potentially dire consequences for people with a disability. A Basic Income grant has the capacity to reduce the propensity for poverty and financial dependence experienced by people with a disability. Australia is a wealthy nation and can afford to introduce a Basic Income scheme. For example, the cost associated with payment of the Disability Support Pension in 2005 was approximately \$7.6 billion per annum (Saunders, 2004b, 2005a, 2007a, 2007b, [CIS]), yet this represented a mere 0.9% of the Gross Domestic Product [GDP] (ACOSS, 2005a, 2006). This reflects an important finding.

An extract from a speech by the then Minister for Social Security, Bill Hayden, shows the amount required for a Basic Income and also indicates the rhetorical device used to resist such a scheme:

*If one sets the guaranteed income at a decent minimum level (say, \$2,000 per annum) and if one sets a negative tax rate which is not too onerous (say, 50%) then this means everyone with an income of less than \$4,000 per annum will receive a grant from the Government. Such a program is bound to be very expensive and may therefore violate our criterion of "economic realism". Further, for various reasons not everyone receiving less than \$4,000 per annum can be said to 'be poor, and so the negative income tax plan in the example I have just given will be subsidising some people who do not really need it. (Cited in ACOSS, 1975b, p. 12)*

In this extract, the discursive formation demonstrates the ideological resistance to the Basic Income proposal, even where the suggested annual rate for the 1970s is set at A\$2,000. Again, the discursive theme of reliance on work incentives emerges as a barrier to the Basic Income proposal. A counter claim rejected the rhetoric of "economic realism" and "generous amount", as shown in the next extract: *"introducing a Basic Income would add little to the cost of providing for all Australians who have sickness or severe impairments as compared with existing categorical benefit arrangements"* (Cited in Tomlinson, 2000a, Ch. 7). In this account, the discursive formation indicates that cost is not considered a burden to the Australian income support system.

Saunders (1987, 1995, [SPRC]) and Tomlinson (2006b) provide further insights into the costs associated with introducing a Basic Income scheme. This was further demonstrated in an excerpt from Professor Cutts: *"it is virtually certain that a major proportion of financing would be through taxation"* (Cited in ACOSS, 1975b, pp. 78-79). Thus, for Australia, a Basic Income grant would need to be implemented through the taxation system, via current tax revenues. As the income support system within Australia is funded through taxation revenue generated in the same year, one way to approach this is by providing a modest rate of approximately 25 per cent of average weekly earnings as a redistributive figure (Tomlinson, 2006c). Thus, the data showed that the introduction of a Basic Income model is achievable and affordable within the Australian context. The Basic Income proposal presents a counter-ideology to cost efficiency argument.

### **Basic Income: Not a utopian panacea**

M. Howard (2006) draws attention to the complexities surrounding the notion of a National Basic Income scheme and the principles of citizenship, global justice, and egalitarian migration policies. He details the pressures faced by countries seeking to implement a Basic Income within a global society. Indeed, the very suggestion of Basic Income as a way to partially address the complex phenomenon of disablism and the categorisation of disability inevitably raises criticisms that at best some form of disability pension is needed.

Alternatively, policy commentators, such as Humpage (2007), use rhetorical devices to advance arguments that the assessment and categorisation of disability is an essential requirement for income support. An extract demonstrates the rhetorical devices used:

*Clearly, some form of medical assessment will always be necessary to assess an individual's eligibility for the DSP [Disability Support Pension]. However, if the reforms had reflected a social model of disability, a greater focus on the contextual factors in which individuals with disabilities live and work would have been evident.* (Cited in Humpage, 2007, p. 224)

This illustration reveals the contradiction in arguing for medical assessment and eligibility criteria, while simultaneously emphasising the incorporation of the social model of disability to ensure sound disability income support policy. Rhetorical devices function to reinforce conventional wisdom, that is, dominant hegemony (Gramsci, 1977). The rhetorical device is found in the phrase: “some form of medical assessment will always be necessary” (Line one, Humpage, 2007). The discursive formations in the above excerpt are contradictory in that there can never be a sound resolution between the social theory and medical model of disability. The narrow conceptualisation of disability as an individual-functional and medical problem and the uncritical acceptance of categorisation of disability are at distinct odds with the social theory of disability. The promotion of disablist tendencies leads to targeted models, as with the Australian disability income support system, becoming the dominant viewpoint (Gramsci, 1977). These findings were identified in the previous section whereby the Commonwealth Government (Commonwealth of Australia, 1975a, 1975b) returned to conservative viewpoints even when considering a universal income support system. The critical point is that the data revealed that with a Basic Income approach, there would be no costly assessments of disability, nor any means-testing or asset-testing. In particular, there would be no testing to discriminate between people or allowances. It is the fundamental premise of Basic Income which is critical here, that is, being in receipt of additional assistance would not be tied to categories of assistance. Rather, it would be assessment across the board, and incorporate the collectivity of all people (as in older persons, unemployed persons), as opposed to generating distinctions based on disability. The danger in reifying arguments about using disability classifications is that structural dimensions are not acknowledged.

A Basic Income is a just alternative to the targeted Australian disability income system given its grounding in egalitarian principles and focus on social justice and social citizenship. Basic Income represents one approach to the redistributive strategy and does not respond to all elements of disablism. The following extract illustrates this discursive theme: “[A Basic Income is not] *the be-all and end-all; just one step on the way to a more secure life for all citizens*” (Cited in Tomlinson 2006b, p. 13). Another excerpt makes similar claims:

*A citizenship income must not be understood as a panacea. It is only part of a distributive strategy that would be consistent with globalisation and ... labour markets. Without other components, it would be ineffectual. And one should think*

*of moving in the direction of citizenship income security, not imagining that such a scheme could be introduced tonight.* (Cited in Standing, 2002, p. 205)

These illustrations show that there are complexities inherent in any income support system under examination. The Basic Income model shares similar difficulties with other income support systems in that there is no one way to determine what constitutes an appropriate level for a Basic Income grant in any given country (van der Veen & Van Parijs, 2006, p. 10). Indeed, Basic Income schemes can be and have been charged with being utopian. As noted in the previous section on tailoring a Basic Income to the Australian context, arguments against the Basic Income model tend to centre on economic feasibility and the assumed high costs of such a scheme. Basic Income advocates, van der Veen and Van Parijs (2006) point out the gaps in the model that require further analysis and debate. Nonetheless, they view the wholesale denunciation of such an approach as being “irresponsible” in that it does not allow for alternative models to be discussed and debates progressed. A counter claim about Basic Income not a utopian panacea is found in the following excerpt:

*A redistributive agenda will only be realized if there are groups not only wanting changes but prepared to demand them and impose costs on those who resist. The failure of progressives was that no politics of paradise was offered. All the protests were against events, rather than for a vision.* (Cited in Standing, 2009, p. 286)

Here, the discourse of a redistributive agenda is used as a rhetorical device in the call for coalition building toward a new vision of egalitarian universal income support based on collective will of the people (Gramsci, 1977). This strategy also reflects a counter-hegemonic utopian project that transforms the targeted approach to an egalitarian universal model.

Another discursive frame shows that “utopian visions” contain consistent elements relevant for generating a Basic Income vision: “*gentleness, conviviality, fraternity and social solidarity. These characteristics cannot be developed unless the economic system gives them a chance.* [The influence of economic fundamentalism means that] *a utopian vision goes against current realities*” (Cited in Standing, 2009, p. 286). The vision in this discourse centres on social citizenship, justice and the capacity to exercise rights. Such a vision is offered as a counter-ideology to Commonwealth authority, conservative paternalism and the ideology of disablism. It is through the use of the social justice and social citizenship counter-hegemonies that transformation of disability income support can occur (Gramsci, 1977).

The findings revealed that where the Basic Income proposal is useful in the Australian context is in its ethical justifications and ideological soundness. The proposal has validity, particularly in terms of shifting away from targeted approaches and moving toward the social citizenship of people with a disability (Gibilisco 2003, 2005; Robertson, 1996; Russell, 2001a). For example, an extract demonstrates that the principle of social citizenship forms a

central underlying feature of the Basic Income proposal and provides moral legitimacy to the scheme:

*Citizenship is the unifying principle of society, and for real citizenship ordinary people must be able to impose order on chaos ... which requires that insecurity be limited. To strengthen citizenship is to help in the institutionalisation of tolerance. A citizenship income [Basic Income] would be a means of strengthening the sense of citizenship. If social policy is a tool of democracy ... a citizenship income would help strengthen the democratic basis of society. (Cited in Standing, 2002, p. 205)*

Dominant economic analyses and recent economic fundamentalist changes tend to discount the moral justifications of alternatives, such as the Basic Income proposal. This closing of debate has been at the expense of social citizenship principles. As the discourse highlights, consideration needs to be given to both the ethical justifications and economic elements of income support policy (van der Veen & Van Parijs, 2006). The findings in Chapters Four and Five revealed that in Australia, including modern Western industrial societies such as Canada, income support for people with a disability has been eroded by the dominance of neo-liberal social policies (Malacrida & Duguay, 2009). The neo-liberal policies rely on punitive mechanisms resulting in a push by governments for increased self-reliance. The discursive theme exemplifies the way the neo-liberal approach to disability income support centres on increasing the self-reliance of individuals at the expense of social citizenship ideals.

Given these historical and current impactors which have clearly eroded the justice aspect of disability income support policy, Clear and Gleeson (2002), Gibilisco (2005) and Oliver (2009) in a similar vein to Van Trier (1995) and van der Veen and Van Parijs (2006) identify social justice as the primary principle for generating a just society for people with a disability.

## **7.4 Chapter Conclusion**

This chapter sought to respond to the emerging research aim of examining the Basic Income model to explore the potential for an alternative approach to disability income support policy. In the first section, it was established that disablism is a widespread concern. The discourses presented the Basic Income proposal as having the capacity to address one level of oppression that is inherent in the Australian disability income support system. As such, the examination revealed that a Basic Income, which is a universal and unconditional grant provided to *all* permanent residents on an individual basis within a country of implementation, would prevent the tendency for disablism. The evidence drawn from the study made clear the discourses which suggested that a Basic Income would also prevent the generation of distinctions on the basis of disability and notions of citizenship connected to productivity and economic inclusion. The constructions of social citizenship and social justice underpinning a Basic Income proposal formed part of a transformative strategy based on egalitarian income distribution (Gramsci, 1977). From this standpoint, an income support system based on the Basic Income model as proposed in this thesis, would be free from



targeting, categorical distinctions and work requirements (BIEN, 2012; BIGA, 2012; Standing, 2004, 2009). This stance is in stark contrast to the way Australian governments have traditionally designed the disability income support system.

This chapter has argued that the existing disability income support system for people with a disability is inherently authoritarian and paternalistic, highly complex, cost-inefficient and disabling. This chapter has suggested that through implementing a Basic Income system free from stringent eligibility criteria (as in assessing for disability conditions) and means-testing, savings could be generated. A Basic Income would go some way to promoting the social citizenship of people with a disability, including the attainment of some degree of autonomy and financial independence. Advocates of Basic Income presented an alternative social reality under a Basic Income scheme, through the emphasis on social justice and social citizenship principles (Gramsci, 1977). The discourses underpinning a Basic Income proposal presented the idea that a Basic Income could constitute an adequate income provision on the basis of social citizenship, rather than on the basis of a proven disability (Nattrass, 2004; Standing, 2005a, 2005b, 2009; Tomlinson, 2001b). These constructions of universal income support promote egalitarianism, which is in direct contrast to the dominant targeted nature of the Australian disability income support system. The Basic Income model as a transformative strategy contains no disabling tendencies (Gramsci, 1977). Rather the model based on universal provision presents an alternative reality on the basis of a non-disabling society that promotes the decency, rights and social citizenship of people with disabilities. Such an alternative grounded in universal principles is possible given the Basic Income model's capacity to counter the ideologies of Commonwealth authority, conservative paternalism and disablism in disability income support.

Several intellectual challenges were examined, for example, practicalities and design, the incentive argument and notion of jobs. It is these intellectual challenges that are critical to the social citizenship of people with a disability. The proposal of an alternative model in the form of a Basic Income represents more than just an academic exercise as there are legislative, policy and practical implications for people with a disability. These issues are the subject of the following concluding chapter, Chapter Eight. The following chapter draws conclusion by examining the interaction of the Basic Income proposal and the Australian disability income support system and outlines some future recommendations.



## CHAPTER EIGHT

### Conclusion

#### Future Considerations for Disability Income Support Policy

There has to be a better way in the provision of disability income support (Mays, 2010)

#### 8.1 Introduction

The thesis started with the concern for social justice and fairness in addressing poverty for people with a disability who rely on disability income support and with the underpinning idea that there has to be a better way in disability income support provision. In the Introduction Chapter, the Clash lyrics mirrored the study's call for justice in the provision of disability income support. In the concluding Chapter, this call is again revisited in the above statement *"there has to be a better way in the provision of disability income support"* (Mays, 2010). This idea of social justice relates to what Wilkinson and Pickett (2009) pointed to as arguing not only for income re-distribution, but also redressing ideological dimensions which lead to unintended consequences. The idea of an income support approach based on social citizenship and non-disablist principles is significant. This thesis has shown that the ideology of disablism is entrenched within the Australian disability income support system through the ideologies of Commonwealth authority and conservative paternalism. The Australian disability income support system has inherently remained the same since the introduction of the Invalid and Old-Age Pensions Act 1908 (Clth). Wilkinson and Pickett (2009) indicated that "the best way of responding to the harm done by high levels of inequality would be to reduce inequality itself" (p. 33). For this study, this means recognising the way the ideology of disablism has pervaded the Australian disability income support system resulting in the vulnerability of people with a disability who rely on disability pensions.

The first part of this chapter details a summary of the disability income support and Basic Income analysis insights by drawing together the findings from Chapters Four, Five and Seven. It then discusses the implications for disability income support policy and how ideologies compromise the social citizenship of people with a disability. The potential for future disability income support policy research is canvassed and recommendations put forward for future development of disability income support policy. Some tentative conclusions around the consideration that "there has to be a better way" in the provision of disability income support are generated.

## Revisiting the thesis aims

Although some studies such as Burrows (2005) and Humpage (2007, 2008) provided time bounded explorations into Australian disability income support policy, these inquiries either reified old arguments for traditional policy responses or failed to propose an alternative model that would enhance the social citizenship of people with a disability receiving disability income support. Even fewer studies have comprehensively examined the historical and ideological dimensions of income support for people with a disability in Australia or explored the implications of changes to disability income support in a substantial way. Thus, this research contributes to generating insights for understanding the historical basis and ideological underpinnings of the Australian disability income support system.

The concern for the limited studies exploring the ideological consequences of policy responses to disability income support led to the research question which underpinned the study. Hence, the central question addressed in the study asked:

- *What historical patterns, including ideological dimensions, lead to the dominance of the Australian targeted income support system for people with a disability over alternative models, such as the Basic Income guarantee model of income support?*

From the outset, the following thesis statement underpinned the research:

*This thesis examines the extent to which the Australian disability income support model, based on targeting, reinforces and perpetuates disablism. It further explores the degree to which the Australian disability income support system potentially contradicts the principles of social citizenship for people with a disability who receive income support.*

Examining social policies on the alleviation of poverty through income support systems requires a consideration of the ideological underpinnings and context of provisions in relation to people with a disability. C. Alcock et al. (2004) suggested that this examination necessitates studying the welfare state regime applied to income support provision and the implications of the enacted system. They added that income support systems can be “generous or minimal” and “conditional or non-conditional” (p. 154). Further, C. Alcock et al. (2004) and P. Alcock (2008) pointed out that the income support systems reflect underlying objectives of the way payments and benefits are distributed and are entrenched with ideological assumptions about what ought to happen, including the types and levels of needs and so-called “desert” in the way payments are distributed. To this end, this study addressed knowledge and methodological gaps by combining the critical historical-comparative policy analysis methodology, with critical discourse analysis method to track the implications of historical assumptions and ideological dimensions relating to Australian disability income support provisions and an alternative Basic Income model. The Disability Income Support

Analytical Framework unique to the present study helped to generate richer theoretical findings.

## **8.2 Summary of Disability Income Support and Basic Income Analysis Insights**

At the heart of this thesis has been the question of disability income support, ideology and the way disability has been constructed across the epochs. The detailed account of the Australian disability income support system and the examination of an alternative model (Basic Income) provided insights into disability income support policy constructions.

### **Disability income support insights**

This thesis has demonstrated that the Australian disability income support system is disabling in nature, and has been from its inception permeated with the ideology of disablism. The entrenchment of the Commonwealth authority and conservative paternalism ideologies over time contributed to the generation of inequities within the disability income support system. Thus, the Australian disability income support system has been part of the disablement process and operated to perpetuate disablism. This study argues that the more inequalities created through historical and ideological dimensions, such as in the disablement process relating to the Australian disability income support system, the worse off society becomes (in terms of socio-economic, health and inequity consequences), thus, the worse off people with disabilities will be (Chouinard & Crooks, 2005; Wilkinson & Pickett, 2009). The insights generated from the findings help to understand the relevance of this point.

The analysis of the Australian disability income support system yielded the following insights contributing to the understanding of the Australian disability income support system:

- Insight one: Entrenchment of Commonwealth authority.
- Insight two: Entrenchment of conservative paternalism.
- Insight three: Permeation and perpetuation of the ideology of disablism.

### **Insight one: Entrenchment of Commonwealth authority ideology**

In part, the disablement process was a consequence of the enduring nature of the principles underpinning the Invalid/Disability Support Pension. The lack of attention to detail in the formative years of the Invalid Pension, could have contributed to the difficulties and Commonwealth authority based on disablist ideology that have doggedly persisted in the administration of the Invalid Pension/Disability Support Pension. Inequitable outcomes were evident in the poverty consequence for people with a disability reliant on disability income support and the associated disablist language. For this study, disablist language was identified as a component of the disabling process of disability income support. Disablist

language was noted in the notions of plight of invalidism, most genuine invalids and genuinely disabled. The study showed the new ways in which the discourses of plight of invalidism, most genuine invalids and genuinely disabled were operationalised in social practices, such as disability income support eligibility determinations, and connected to the dominant hegemonic strategy of Commonwealth authority (Fairclough, 2003; Gramsci, 1977). Conversely, even where different translations, contestations and recontextualisations of these discourses and practices occurred across each of the epochs, they manifested as disablist ideology. The disablist language was an outcome of perceptions of the non-productive disabled citizen as a burden on the disability income support system because of the un/productive citizen and enabled active citizen constructions (Gibilisco, 2003; Oliver, 2009). The idea of an un/productive citizen requiring incentives to be an active contributor to society supports the findings of previous studies, such as Oliver (2009). Where this study is different from other studies is in the way these concepts (such as plight of the invalid and genuinely disabled) were constructed and tied to the Australian disability income support system. Commonwealth authority for this study became the mechanism for entrenching the regulatory control of people with a disability in receipt of disability income support.

### **Insight two: Entrenchment of conservative paternalism ideology**

The study revealed the charity theories evident in conservative paternalism discourse. Paternalism has been identified as a dominant feature in disability and income support policy studies (Barnes & Mercer, 2003; Oliver, 2009; Standing, 2002, 2005a, 2009, 2011). The research found similar paternalistic assumptions. However, the present study identified the interaction between the inherent conservatism underpinning Australian disability income support policy over time and paternalism. Rather than operate solely as paternalism, the interaction with conservative ideology served to characterise the early epochs with notions of disability income support as somewhat of a charitable dole. Therefore, categorical eligibility was tied to a moral right in which disability income support provision was not an assumed right. The disablist language reified distinctions between able-bodied and presumed disabled citizens. A key distinction from earlier epochs and other studies (such as Oliver, 2009) is located in the notion of “not an assumed right” and the later “assumed earned right” concept. Disability income support operated as an earned right, rather than a universal right of citizenship. This idea of an earned right for people with a disability in receipt of disability income support is significant as previous studies have not pinpointed the actual point in time where language constructions perpetuated Commonwealth authority and conservative paternalism even when they presented under different manifestations.

The deserving of a pension and conservative mistrust finding contributes to the understanding of disability income support policy in that Commonwealth authority operated in conjunction with conservative paternalism to position the disability concept in terms of disabled people as being unproductive. The research explicated the point in time in which

conservative paternalism interacted with Commonwealth authority to perpetuate stereotypical assumptions which presumed helpless dependence on disability income support. This stereotype and the associated discourse suggested that people with a disability were unemployable and habitual malingerers, and, thus undeserving invalids. The conservative paternalism displayed by governments in the concern for dependency operated to reinforce greater social control of disability pensioners through the tighter targeting of disability income support. Often the disablist language constructions, such as genuinely disabled, inadequate invalids, helpless dependents and genuinely needs/undeserving invalids served as a justification for introducing tighter targeting of disability income support and narrowing the conception of the disability concept (Oliver, 2009). Further, the discourse and associated practices recontextualised across each epoch, functioned to embed conservative paternalism ideology in relation to disability income support policy (different historic blocs, hegemonic projects and bureaucratic centralism operating across different epochs) (Gramsci, 1977). The difficulties associated with the dominant conservative mistrust and genuinely disabled ideologies influencing disability income support policy, provides grounds for future research into identifying these points in time that ideologies become entrenched. This research revealed the historical and modern conceptions underpinning disability income support policy, which connected the receipt of disability income support to notions of deservingness, moral duties and obligations.

### **Insight three: Permeation and perpetuation of the ideology of disablism**

The perpetuation of Commonwealth authority and conservative paternalism ideologies entrenched disablism over time and led to the predominance of the targeted Australian disability income support model. The study discerned the ideology of disablism particularly in the plight of invalidism and disabled bludger constructions. Other studies also have not revealed the way the Australian disability income support system is disabling in nature and operated with disablist principles and discourses to impact on the social citizenship of people with a disability in receipt of disability income support. This suggests that the ideology of disablism has permeated across the epochs relatively unchallenged and unchanged. The ideology of disablism is closely related to the material conditions and political economy of Australian society and subsequent poverty consequences. This interaction between ideology, discourse and social practices in turn relegated people with a disability reliant on disability income support to be constructed second class citizens. The thesis has made an important contribution to understanding the historical basis of disability income support and documenting the changes within the Australian disability income support system over time. The findings of this thesis build on previous understandings (such as Burrows, 2005; Gibilisco, 2003) which did not necessarily examine an alternative approach to the traditional targeted Australian disability income support system.

### **Alternative model (Basic Income) insights**

The study revealed that an alternative model underpinned by social justice and non-disablist principles, such as the Basic Income model was relevant for promoting the social citizenship of people with a disability.

- Insight one: Basic Income as a universal right based on social justice, decency and non-disablist principles.
- Insight two: Citizenship as a pre-condition for Basic Income, rather than categorisations of disability.
- Insight three: Intellectual challenges to alternative model implementation.

#### **Insight one: Basic Income as a universal right based on social justice, decency and non-disablist principles**

The long history of Basic Income debates in policy spheres (for example, Lo Vuolo & Raventós, 2009; Milner, 1920; Standing, 2005a, 2009) have contributed to advancing the understanding of the way Basic Income can offer an alternative to traditional dominant income support systems. Much of this debate though has not considered the disability dimension in income support. Indeed, contemporary debates on Basic Income tend to treat the disability dimension as not relevant to the Basic Income debate and relegate it to disability studies. However, some proponents of Basic Income, such as Murray (2008) and Standing (2005a, 2009) have attempted to draw attention to the disability dimension. The comparison of the Australian disability income support system with a Basic Income revealed the capacity for the Basic Income model to counter Commonwealth authority, conservative paternalism and the ideology of the disablism. It does this through its principles of universal rights grounded in social justice. The discursive theme functions as a precondition for the implementation of a Basic Income for people with a disability, and are found in the discourses of, freedom from regulatory control, redistribution based on fairness; distributive justice in meeting basic need; a non-disabling “necessary condition for a right to work”; and social justice for all. This finding helps deepen the understanding of the way a Basic Income redresses one aspect of the ideology of disablism in relation to disability income support policy. That is, through the discourses of a non-disabling society for people with disabilities based on decency; and meaningful rights, towards social justice and solidarity for people with disabilities. This thesis provides an original contribution to the debates on disability income support (both the existing and the alternative, Basic Income) by suggesting that the disability dimension is important to the Basic Income debates in terms of maintaining the ideological soundness of such a model (Wilkinson & Pickett, 2009). The notion of Basic Income as a universal right based on social justice, decency and non-disablist principles makes it both a transformative strategy and redistributive discourse.



The identification of regulatory controls and stringent eligibility criteria as part of the Australian disability income support revealed the propensity for targeting only reaching a few people. This means Australian disability income support payments do not compensate all people, and the system has no capacity ensuring all people can receive the disability income support. The comparison of the Australian disability income support system with the Basic Income model highlighted that the Basic Income grant goes some way to upholding social justice and universal rights for disability pensioners. As indicated in this study, and similar to Wilkinson and Pickett, a Basic Income leads to a more equal society in which fewer people are excluded unnecessarily or included wrongly. Thus, the more equal a society is, the better it is for many people in that it promotes a society that is not only more egalitarian, but also one that is less disabling (Wilkinson & Pickett, 2009). This point is based on the idea of using a social definition of disability and considering, what is disabling. The transformative strategy discourse and the notion of enacting preconditions ideas are based on discourses of social justice and universal rights which offer a counter-ideology to Commonwealth authority, regulatory control, and conservative paternalism and the ideology of disablism.

### **Insight two: Citizenship as a pre-condition for Basic Income, rather than categorisations of disability**

A Basic Income model operates differently from the Australian disability income support system in that a Basic Income has no stringent eligibility criteria as a qualifier for receiving income support. This principle of social citizenship for income support eligibility, rather than categorisations of disability is in stark contrast to the Australian targeted approach of disability income support. The emphasis of the Basic Income model eligibility on the basis of citizenship rights, not a “proven disability” remains an important finding. The study suggested that a Basic Income model enhances the fairness of income support policy and is supported by Kinnear (2000). The comparison of the Australian disability income support system with a Basic Income revealed the capacity for the Basic Income model to counter Commonwealth authority, conservative paternalism and the ideology of the disablism through its principles of autonomy, decency, socio-economic independence and non classification.

The study also found that the Australian disability income support policy perpetuated disability principles and discourses which stigmatised disability income support recipients. In contrast, a Basic Income grant is unconditional (Standing, 2002, 2005a, 2009) and it is through its defining principles of the grant being “a right of citizenship”, and rejection of conditionality based on disability dimensions that represent a transformative alternative to the Australian targeted disability income support system. As a social citizenship discourse, Basic Income uses language to construct people with a disability in relation to social citizenship and rights, rather than classifications. Thus, there are no disabling distinctions generated under a Basic Income model. This finding helps deepen the understanding of the

way a Basic Income redresses one aspect of the ideology of disablism in relation to disability income support policy

The study found that the Australian disability income support system generates categories on the basis of “ableness” as a condition of citizenship, whereas a Basic Income grant is unconditional and a form of guaranteed minimum income (Standing, 2004, 2009). The Australian targeted income support system reinforces disablism through its classifications, which leads to the creation of disabling distinctions (Chouinard & Crooks, 2005; Galvin, 2004). The comparison of the Australian disability income support system with the Basic Income model highlighted that the Basic Income grant goes some way to preventing poverty consequences. The study found that, although a Basic Income is not totally about equality, the model applies the social citizenship discourse as a transformative strategy in the transition to egalitarian income support provision. This in turn helps to ensure that those people with a disability marginalised at the lower end of income distribution can receive some form of support based on egalitarianism rather than disability classifications. This discursive theme is found in the autonomy and socio-economic independence, together with freedom from stigmatisation discourses.

The study found that entrenched ideology of disablism in disability income support presented as a potential barrier to the implementation of a Basic Income model. However, the Basic Income model has the capacity to mobilise support by applying a counter-ideology to disrupt the hegemony of Commonwealth authority, conservative paternalism and disablism (Gramsci, 1977). Similarly, as a transformative strategy, Basic Income provides an alternative reality based on social justice and citizenship which establishes support for and identification with a potential for a better way. The counter-ideology of Basic Income across the epochs has encountered resistant discourses in an attempt by the ruling bloc's capacity to destabilise oppositional viewpoints and to reshape and influence the conditions under which opposition can occur (Gramsci, 1977). For example, even where a Basic Income grant was suggested by proponents of universal payments, tighter targeting of disability income support ensued. However, Basic Income has the potential to disrupt the ideology of disablism in income support policies through its transformative strategy and counter-ideology of social justice and citizenship.

For a model to be based on social citizenship it needs to contain principles that align with non-disabling income support approaches and universal applications; a feature in which the Basic Income model can provide. A Basic Income counters Commonwealth authority and regulatory control as it does not promote the categorisation of people with a disability or reinforce disablism. Income support provision is based on citizenship rights, rather than classifying eligibility requirements on the basis of disability. Other studies have not examined the Basic Income model in relation to the Australian disability income support model.

### **Insight three: Intellectual challenges to alternative model implementation**

The insights into the intellectual challenges of an alternative to the current Australian disability income support system have shown that there are some political barriers to implementing such an alternative model as Basic Income. Although the findings revealed the need for a different ideological basis for disability income support, implementing an ideologically distinct universal income support scheme (such as Basic Income) would take time, particularly in terms of policy design. Nonetheless, if policy-makers, academics, and practitioners are serious about the citizenship of people with a disability, then Basic Income may be a useful alternative. However, the study suggested that a Basic Income is not the utopian panacea for addressing all instances of disablism, nor does it necessarily provide a set of strategies to improve the existing disability income support system within Australian. What a Basic Income does provide, on the basis of social citizenship and non-disablist principles, is the least oppressive form of income support to people with a disability and all people. Even when the idea of a universal income grant has been touted in Australian government policy debates, for example the Henderson Poverty Line (Commonwealth of Australia, 1975a, 1975b), Australia has not shown much inclination to embark on the implementation of an alternative model such as Basic Income. Thus, a political commitment to change is required to address the perpetuation of Commonwealth authority, conservative paternalism and to bring about change. In noting that a Basic Income model is not perceived to be a utopian panacea, one Basic Income advocate countered this claim by suggesting that some form of utopian vision is required to introduce a universal income support system. This idea of a utopian vision is related to the inherent tensions associated with the implementation of a Basic Income grant.

An important consideration is enduring nature of the ideology underpinning the Australian targeted disability income support system. The targeted approach has been successful in becoming entrenched insofar as to the formation of historic blocs by the Commonwealth authority across the epochs to create a dominant hegemony. The ideology of disablism was a complex interplay of factors operating in conjunction with Commonwealth authority and conservative paternalism and played out in civic and Commonwealth arenas (Gramsci, 1977). This gave credence to the capacity to reconstitute the meaning of particular concepts such as citizenship and social justice in an attempt to gain legitimacy for tighter targeting in any given epoch (Gramsci, 1977). The attempts by historic blocs to secure Commonwealth authority and conservative paternalism ideology resulted in disabling constructions such as the plight of invalidism and disabled bludger constructions. However, the Basic Income alternative in itself operates to disrupt the ideology of disablism in disability income support by providing a transformative egalitarian income distribution strategy.

The study revealed the finding of inherent tensions underpinning such a transformative strategy as the Basic Income model. The tensions were evident in relation to the notion that

the grant is paid to all people and the equity principle. The tension raises the issue that maybe social justice is better placed to provide payment to some vulnerable members of society (such as people with a disability) over others (who have wealth). Yet, these tensions form part of an ongoing debate that continues to be played out across Basic Income and income support policy research, publications and policy/public forums. Another tension is that there is always a danger in replacing one system with another model that is inherently the same and does not respond to equity issues. This reformist ideal is a form of passive revolution (Gramsci, 1977). It is not expected that this study will resolve all of these issues and tensions. Rather, this study examined the way people with a disability were treated within the Australian disability income support system across time. Any examination of alternative universal income support systems is fraught with complexities and competing ideas. In the 1970s, the then Minister for Social Security, Bill Hayden recognised the need for generating a commitment from the grassroots level through to the political level. Gramsci (1977) proposed the adoption of a similar approach to ensure the Basic Income is transformative in nature.

A change in the existing form of Australian disability income support does not happen immediately and several challenges drawn from the findings demonstrate the type of change required, such as modifying the general taxation revenue system. These findings are significant in that any change requires policy debate and time. Nonetheless, the type of change required for implementing a Basic Income model is not an impossible task (Gramsci, 1977; Wilkinson & Pickett, 2009). Policy debate and consideration of the implementation challenges represents a significant finding as it provides some strategies for progressing toward an alternative to the current disability income support system within Australia.

The next section details some recommendations for future development of disability income support policy and research.

### **8.3 Potential for Future Disability Income Support Policy Research**

The search for a better way to disability income support policy responses has generated several potential areas for future disability income support policy research and contribution to existing policy and direct service practices. These potential areas incorporate:

- i. Across policy research design: Applying the study's critical historical-comparative methodology and Disability Income Support Analytical Framework the analysis of other policy domains.
- ii. Inform social work and human service direct service policies: Unpacking ideologies and contradictions underpinning citizenship.
- iii. The lived experience of "life on the disability pension".
- iv. Extending policy debates: Contributing to the current debate on a National Disability Insurance Scheme and extending the historical timeframe.

These four potential areas for research based on the contributions of the present study are explored in the following section.

**i. Across policy research design: Applying the study's critical historical-comparative methodology and Disability Income Support Analytical Framework to other policy analysis**

**Application of critical historical-comparative methodology to other policy fields of analysis**

The methodology of critical historical-comparative policy analysis was useful for the present study in that it provided an approach for researching the history of income support policy and the underlying ideological assumptions surrounding policy initiatives. Conducting detailed work on alternatives, including the Basic Income model, assists in presenting rich, comprehensive understandings of the implications of different policy approaches. The application of the critical historical-comparative policy analysis methodology contains the potential for other policy researchers to devise a deeper sophisticated approach to policy analysis across a number of policy areas, such as income support, health and welfare (Bessant et al., 2006; Chambers & Wedel, 2009; Jamrozik, 2009; Pixley, 1993). This adoption of the methodology would prevent the tendency for prescriptive approaches to policy development and assist in uncovering the ideologies, such as the construction of disability and the ideology of disablism. An important consideration in the analysis and construction of social policy is being perceptive about the nature of social policy and the consequences (Bessant et al., 2006; Chambers & Wedel, 2009; Jamrozik, 2009; Pixley, 1993). For example, the development of policy and the strategies the governments draw on for consultation purposes can generate illusions that true consultation has occurred. Yet, often consultations are approached with a preconceived agenda set by governments, which in turn limits the outcome for people with disabilities (Malacrida & Duguay, 2009). Social policy responses tend to be grounded in ideology and vested interests (Bessant et al., 2006; Chambers & Wedel, 2009; Wilkinson & Pickett, 2009). Thus, critical historical-comparative policy analysis methodology could provide an approach for revealing hidden ideologies and the implications for social policy.

**Application of Disability Income Support Analytical Framework to other policy fields of analysis**

The Disability Income Support Analytical Framework developed in this present study has allowed for capturing the historical dimensions and ideological assumptions of the disability income support system, which have not been traditionally adopted in other research studies. During the initial phases of the present study, an analytical framework that allowed for a richer detailed examination of the history and ideology underpinning the Australian disability income support system was not available to the researcher. Most international and national

social policy research into income support and employment policies (for example, Bessant et al., 2006; Cook, 2004, 2006; Esping-Andersen, 2000a, 2005b; Goodin et al., 2000; Standing, 2002; Tomlinson, 2000a, 2000b) relied heavily on welfare state regimes and their core conceptual components for analysis. The Disability Income Support Analytical Framework addressed these gaps in the existing studies. The developed analytical framework also provided an approach for delving deeper into social policy to reveal hidden dimensions and reasons for the dominance of particular policy approaches. Thus, the application of the Disability Income Support Analytical Framework designed in this study could be adopted to other policy studies. Clearly there is a need for using relevant and sophisticated analytical frameworks, such as the one devised in this study, to respond to policy consequences and reveal the ideological consequences similar to those ideologies uncovered in this study.

A key area in which the Disability Income Support Analytical Framework from the present study has value is in the way the analytical framework can be applied to policy analysis into legislation and programs. The analytical framework can be used to enhance analysis particularly in drawing out ideological implications of policy and further explore the relevance of the ideology of social citizenship, particularly in the way disability services legislation is constructed and whether the ensuing policies enhance or constrain the rights of people with a disability. For example, applying the Disability Income Support Analytical Framework could involve exploring the social justice principles underpinning the Queensland Disability Services Act (2006), such as Part 2, s. 19, 3(a), “when using disability services people with a disability have the right to: services supporting their achieving quality of life in a way that supports their family unit and their full participation in society” (Queensland Government, 2010, p. 22). The framework work would assist in drawing out the extent to which participation, based on social justice is translated into policy practice or whether hidden ideological dimensions influence the translation of policy into service delivery and prevent full participation in society.

In taking this application further, State or Federal housing policy can be examined using the Disability Income Support Analytical Framework to understand the nature of the changes to public housing over time, including the ideological changes across time, such as the transition from institutions to community housing and the extent to which ideological assumptions have contributed to supporting people with a disability or mental illness in the community. The relevance of the framework for other policy studies is that researchers can take the basic framework and build on it for their own purposes across different policy fields, such as health and welfare (Bessant et al., 2006). The Disability Income Support Analytical Framework provides one way to explore different forms of oppression in Australian disability income support system and Basic Income and across multiple oppressions, such as intellectual disability and lesbian and gay oppressions. Income support models have

examined oppressed groups and the “other”, such as feminism, yet people with a disability have often been marginal to this exploration (C. Thomas, 2005; Oliver, 2009).

## **ii. Inform social work and human service direct service policies: Unpacking ideologies and contradictions underpinning citizenship**

Clearly, there is a need to unpack the ideologies and contradictions that impact upon citizenship. The direct service policies represent the interface between the disability income support and other social policies and the policy targets, in particular people with disabilities (Fischer, 2003; Galper, 1980; Rowlingson, 2009) but do not always reflect the social citizenship of people with a disability. Professional policy-makers and practitioners have the capacity to increase awareness about the way ideology operates to marginalise people with a disability. They also possess the capacity at the practice level to counter disabling ideologies (Oliver, 2009). Training professionals in policy-making and practitioners in translating policy can assist in bringing attention to the power of policy constructions and the implications for practice. This awareness involves identifying ideologies underpinning the Australian disability income support system and Basic Income to consider non-disabling policies in practice.

Practitioner led approaches to countering ideologies would help to frame a practice that challenges below the surface ideologies from a critical standpoint (Fairclough, 2003) and better prepare them with skills to address dilemmas encountered when working with people with a disability. For example, policy can only be effective at the direct service level only if implementation strategies are considered (Stafford, 2009). Therefore, as demonstrated in the findings, the Australian disability income support system is highly complex leading to overly onerous procedures often coupled with stringent eligibility requirements. As the practice level, some simplification of the procedures, such as accessible formats, simplified assessment forms and increased decision-making and localised accountability at the direct service level (Stafford, 2009) would provide practitioners with an opportunity to tailor policies to meet the context of the practice setting. In another example, the issue of rehabilitation and therapeutic interventions for people with a disability has long been associated with the medical model (Oliver, 2009). At the direct service level, an understanding of the power of disability constructions could be used to shape a practice approach that enhances citizenship, rather than solely rely on medical models underpinning interventions.

## **iii. The lived experience of “life on the disability pension”**

Another potential area of research is to hear the voices of people in receipt of the Disability Support Pension to understand the actual reality of living on disability pension and the experience of living with the ideological consequences. For example, some possible research questions might incorporate: *how do people with a disability living on the disability pension adapt to disability income support policy changes and government rhetoric*, and

*what is the actual impact of these policy changes and government ideology* (such as implications of powerlessness). The potential for designing research suggested in this thesis through the combination of several research methods, such as life story, narrative and critical discourse analysis (D. Atkinson, 2001, 2005; Couser, 2006; Goodley, Lawthom, Clough & Moore, 2004; Quibell, 2004), could yield important insights into the lived experience of people with a disability in receipt of disability income support and in turn contribute to better policy design. Using similar approaches, such as life stories and photo-voice research strategies by D. Atkinson (2001, 2005) and Goodley et al. (2004) could assist in addressing the silencing of the voices of people with disabilities.

The reliance on neo-liberal policies in the later epochs contributed to the silencing of the voices of people with a disability who are in receipt of the disability income support. Clearly, the findings have implications for policy workers and practitioners in terms of developing better ways to understand disability constructs and the voices of people with a disability who are often at the blunt end of disability income support policy changes (Tomlinson, 2006a). The purpose and boundaries of the thesis prevented the incorporation of the voices of people with a disability themselves. Rather, than see this as a limitation, the researcher believes it provides the scope for a richer in-depth future research opportunity to examine the rich contextual data on the actual experience and consequences of living on disability income support and the associated policy changes.

#### **iv. Extending policy debates: Contributing to the current debate on a National Disability Insurance Scheme and extending the historical timeframe**

The focus of the study centred on a 100-year timeframe (1908 to 2007) within the Australian context. There is a potential for further research that extends on the timeframe and incorporates the time period between 2007 and 2010. Broader political changes have ensued which indicate the need for further work on disability income support policy. From late 2007, a Labour Government came to power which meant that while few changes to disability income support occurred, there has been a strong shift in policy debates. The issue of National Disability Insurance Scheme has been placed on the agenda with advocates calling on the Government for introducing such a scheme to improve the lives of people with a disability receiving disability income support, including carers and support workers (National Disability Insurance Scheme, 2010). This point aligns with the first recommendation in which the National Disability Insurance Scheme has been uncritically accepted as a feasible alternative to the Australian disability income support system and specialist disability services (Leipoldt, 2009). The funding of the social insurance scheme is proposed via general taxation revenue, akin to the Medicare levy (Commonwealth Department of Families, Housing, Community Services & Indigenous Affairs [FaHCSIA], 2010).



The findings from this study could be used to further the debate. The voices from policy-makers and policy commentators could be drawn on to provide input into a disability income support system that recognises the social citizenship of people with a disability (Malacrida & Duguay, 2009). The difficulty of proposals such as a national disability insurance scheme is the propensity for subscribing to traditional theories of disability and dominant market-oriented (economic) analyses which reinforce the disablism of people with a disability, particularly people with a disability reliant on disability income support. As Leipoldt (2009) suggests, the scheme does not protect against disabling attitude or the forces of the market. The National Disability Insurance Scheme is based on the market-oriented insurance models which ultimately uphold for profit and cost containment principles. Under this model, income support would be tightly targeted and stringent eligibility criteria would be applied for measuring disability. Thus, the findings from the thesis can be used to engage in the debate and develop policy submissions to the Commonwealth Government.

#### **8.4 Tentative Conclusions: *There has to be a Better Way.* The Potential for an Alternative Disability Income Support Model**

The original intent of the thesis centred on the notion of “there has to be a better way” for providing disability income support. The intellectual challenges demonstrated that a change to an alternative model of disability income support, such as the Basic Income model, is not a matter of just tweaking the existing model or adding to the administrative complexity of the existing targeted Australian disability income support system. Tweaking the system results in a form of passive revolution and is not transformative. The study also acknowledges the inherent tensions in the notion that a Basic Income grant is paid to all people. The language constructions and discourses form part of the political debates surrounding the Australian disability income support system and alternatives such as the Basic Income grant. As noted in the previous section, the political context is critical as part of the change process as any transformation is not about changing one model for another, but accounting for the socio-political climate of the day and exploring alternative approaches. The thesis has provided one way forward for disability income support policy and responding to the ideology of disablism which was inherent in the Australian disability income support system.

If the Australian disability income support system is disabling in nature through the entrenchment and perpetuation of disablism, then an appropriate alternative model, such as Basic Income, could be highly relevant. Even where tensions exist, the exploration of an alternative model based on social citizenship and social justice is highly relevant in relation to disability income support policy. The findings suggested that an alternative income support system for people with a disability needs to be underpinned by social, non-disablist principles and social citizenship.

Even given the inherent challenges of Basic Income as a redistributive strategy, the principle that the Basic Income model is paid to all people (within the context of national boundaries and citizenship) is a significant finding, as the grant does not differentiate between different types of disability. Equity comes through the taxation system. In itself, the existing Australian disability income system does not constitute the welfare state. In Australia, income support gets paid at an inverse proportion to the taxation system. Consequently, the welfare state and existing Australian disability income support system overlap and build in inequalities. However, in contrast and as the findings suggested, a Basic Income grant has no means test and relies on the taxation system to build in equity, which contains the propensity to redress the social justice principle in terms of equity, than does the welfare state.

## 8.5 Concluding Comments

The study of the Australian disability income support system has revealed the disabling nature of the system over time. The study has provided a basis for countering the disablist ideology and discourses underpinning the Australian targeted disability income support system, and paved the way for introducing the idea of alternatives, such as the Basic Income model, to the existing system. The study acknowledges the tensions associated with any discussion and implementation of alternative income support models such as a Basic Income. As mentioned, there is always a danger in redistribution strategies whereby one model is substituted for an essentially similar model. Yet, for people with a disability, academics and policy-makers *there is a better way* in the form of a transformative strategy, a Basic Income grant (Wilkinson & Pickett, 2009). As Gibilisco (2003), Hayden (ACOSS, 1975b) and Wilkinson and Pickett (2009) asserted, what is required is political will. This political commitment would align with a vision for alternative income support policies grounded in non-disablist principles and social citizenship.

The study provides a contribution in the exploration of the historical elements of the Australian disability income support system and the ideological features which perpetuated the disablement process. Further, it suggests presenting alternatives (such as Basic Income), to the existing Australian disability income support arrangements, provides a basis for generating political commitment to an alternative reality in disability income support provision. Few studies on disability income support policy have made this connection, nor researched the potential for alternative schemes. Future research could progress the work started in this study and examine the narratives of people with a disability who receive disability income support. An alternative vision requires the input of the very people excluded from research and policy. In concluding this study, the researcher draws on the words of Wilkinson and Pickett (2009) who stated:

After several decades in which we have lived with the oppressive sense that there is no alternative to the social ... failure of modern societies, we can now regain the sense of optimism which comes from knowing that the problems can be solved.

We know that greater equality will help us rein in consumerism.... We are on the verge of creating a qualitatively better and more truly sociable society for all. (pp. 264-265)

What is required is the commitment to the idea that “there has to be a better way”. Wilkinson and Pickett (2009) give credence to this study and take the argument for alternative models, such as a Basic Income model, one step further toward disability income support based on social justice and non-disablist principles. These ideas for social just policies, including disability income support are similarly shared by disability social theorists (Barnes & Mercer, 2003; Gibilisco, 2003; Oliver, 2009). This idea provides a relevant ending for a study which has examined the historical and ideological patterns of the Australian disability income support system, and explored the relevance of an alternative approach (Basic Income), in terms of ideological soundness and less disabling income support system based on social citizenship principles.



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## APPENDIX ONE

### Methodology

Discovery is a constant process of dialogue between the already known and the as yet unknown. (Ezzy, 2002, p. xiii)

#### Section Overview

The above quotation by Ezzy (2002) captures the essence of this study's research strategy, methodology and methods. The research process involved ongoing movement between what is known about the Australian disability income support policy and the "unknown" hidden ideological assumptions. This section provides an overview of the methodological approach used to inform the conduct of the study and guide the development of the Disability Income Support Analytical Framework (detailed in Chapter Three). The section follows Crotty's (2003) outline to guide the study, and comprises the sections: *ontology*, *epistemology*, *theoretical perspective and methodology*. The first section on ontology scopes the relevance of historical materialism. The second and third sections provide an account of the critical social science epistemological approach and critical theoretical perspective guiding the study. The fourth section details an account of the qualitative methodology using the methodology of critical historical-comparative policy analysis.

This methodology section details the research strategy and design and research integrity central to meeting the study's aims.

#### Research Strategy and Design

The process of designing a research strategy conducive to the research aims required consideration of an approach that addresses the research question and meets the rigorous requirements of research. The researcher recognised the need for grounding the study in a sound rationale that upheld conceptual and methodological rigour and logical consistency in the decisions underpinning the research strategy. The design strategy used in the present study is informed by Crotty (2003), who proposed the use of a guiding structure to represent the "scaffolding" underpinning the research strategy design. This structure, detailed in Table 1.1, assisted in systematising and guiding the study's research design, while simultaneously engendering logical correspondence between elements (ontology, epistemology, theoretical perspective, methodology and method).

**Table 1.1 Research Design Structure for this Study of Disability Income Support Policy**

Ontology	Epistemology	Theoretical Perspective	Methodology
<ul style="list-style-type: none"> <li>• <b>Historical Materialism</b></li> <li>• Social and material dimensions of disability policy</li> <li>• Induction to assist description, interpretation and explanation</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Critical Social Science</b></li> <li>• The social construction of disability income support policy</li> <li>• Looking beyond the surface of disability income support policy to reveal hidden dimensions</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Critical Theory Tradition</b></li> <li>• Gramsci's theory of hegemony (1977, 1996)</li> <li>• Williamson (1978) and the ideological construction of meaning</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Applying Qualitative Research Strategies</b></li> <li>• <i>Critical historical-comparative policy analysis</i></li> <li>• <i>Research design logic and unit of analysis</i> <ul style="list-style-type: none"> <li>• i. Explore across time (historical dimension policy analysis)</li> <li>• ii. Compare two income support models (comparative dimension policy analysis)</li> </ul> </li> <li>• Developing the disability income support analytical framework to guide analysis</li> </ul>

### **Ontology: Historical Materialism**

The ontological assumptions underpinning the study derive from a social theory of disability informed by historical materialism.

### **Social and material dimensions of disability policy**

From these positions, disability income support policy is located in the structures and historical-material conditions of capitalist society, including its relationship to the means of production. As such, understandings emerging from historical materialism form a social-relational ontology that extends the social theory of disability. For this study, a social-relational ontology depicts social reality as a structure based on “material difference in terms of race, class, and gender” dimensions (Denzin & Lincoln, 2005, p. 24). Barnes and Mercer (1997, 2003, 2004), Oliver (2009), and C. Thomas (2004a, 2004b, 2007) also argued that disability is one of the structural dimensions which needs to be incorporated into disability income support policy research. This ontological understanding helps the theorising of disability within policy as a social-relational phenomenon, as opposed to traditional

individual-functional and charity interpretations (Barnes & Mercer, 2004; C. Thomas, 2004a, 2007; Oliver, 2009).

The theorising of disability in terms of a social-relational ontology also assists this study in situating disability in relation to the broader political economy. Barnes and Mercer (1997) noted that “the political challenge must have particular targets in the research process. Uppermost in the minds of most disability writers has been the need to transform the ‘social and material relations of [policy] research production’” (p. 5). It is these ontological assumptions outlined by Barnes and Mercer (1997, 2003) and C. Thomas (2004a) which drove the researcher’s initial search for an alternative reality to the current Australian disability income support system. From the outset, the statement underpinning the present study’s research questions, centred on the notion that “*there has to be a better way*” in the provision of disability income support.

### **Induction to assist description, interpretation and explanation**

Induction was used to meet the present study’s goal of examining the historical and ideological dimensions disability income support policy, as detailed in the Introduction Chapter. Within the context of the present study, the inductive research strategy begins by exploring and describing the historical patterns relevant to disability income support policy (Bryman, 2008; Ezzy, 2002; Sjørberg & Nett, 1997; Willis, 2007). Induction was useful in understanding the ideological dimension in terms of generating deeper level explanations of the policy justifications used to promote particular disability income support models, together with the way social policy texts are situated within society (Reisigl & Wodak, 2009; Wodak & Meyer, 2009).

Thus, induction allowed the study to respond to the primary research question of:

- *What underpins the Australian disability income support system and leads to the dominance of the targeted income support system for people with a disability over alternative models?*

Further, induction enhanced the approach to tracing the historical developments of disability income support for detecting *at what points significant policy constructions of disability were introduced* and whether an alternative model provided the means for achieving social change (Fairclough, 2003).

### **Epistemology: Critical Social Science**

In line with the ontological concerns, the epistemological basis of the study is informed by critical social science. Critical social science offers a frame of reference for the study in that it is “*a critical process of inquiry that goes beyond surface illusions to uncover the real*

*structures in the material world in order to help people change conditions and build a better world for themselves [italics in original]*" (Neuman, 2006, p. 95). The critical approach addresses both the historical and comparison elements of the study, given the stance's usefulness in discerning dialectical relationships and moving toward the social transformation of disability income support policy (Fairclough, 2003; Reisigl & Wodak, 2009; Willis, 2007, p. 85). The correspondence with discursive elements of disability income support policy is highly relevant for understanding policy relations within the broader capitalist mode of production.

### **The social construction of disability income support policy**

The present study seeks to understand the way different historical points in time and material conditions of society construct the disability concept and, thus, shape disability income support policy (Fairclough, 2003; Reisigl & Wodak, 2009). The study takes into account "the production of reconstructed understandings of the social world" (Denzin & Lincoln, 2005, p. 24). For the present study, an exploration of disability income support policy from a critical social science perspective helped to discern whether disability policy discourse has a regulatory function and is a tool of oppression, or, by contrast, operates as a liberating mechanism.

### **Looking beyond the surface of disability income support policy to reveal hidden dimensions**

The underpinning principles of critical social science fit with the nature of the research problem being investigated. The researcher uses a critical approach to examine hidden ideological principles and contradictions inherent in disability income support. Further, a critical stance emphasises the politically contested nature of competing "truth" claims and calls for reflexivity in dealing with the categories that help to make sense of the social world (Willis, 2007, p. 85). Critical social science informs the comparison aspect of the study in examining an alternative model to the current dominant targeted disability income support system.

### **Theoretical Perspective: Critical Theory Tradition**

The theoretical perspective of the study incorporates the disability dimension to enable a structural analysis of disability income support policy, rather than relying solely on the class dimension in a Marxist analysis. The theoretical stance adopted incorporates the critical theory tradition in understanding disability income support policy. The study's theoretical perspective incorporates a blend of Gramsci's (1977, 1996) theory of hegemony (particularly in the way some ideological perspectives gain dominance) and Williamson's (1978) ideological construction of meaning.

### **Gramsci's (1977, 1996) theory of hegemony**

The study is informed by Gramsci's (1977, 1996) concept of hegemony, which includes a range of structural dimensions (such as disability, age, race, gender and locality), rather than solely class dimensions. The study draws on Gramsci's concepts of hegemony, ideology, communication and dialectics in order to understand the political nature of the Australian disability income support system together with the way policy-making is grounded within a capitalist political economy (Marston, 2004; Fairclough, 2003; Willis, 2007). The application of Gramsci's theory of hegemony in this study centres on discerning the ideological assumptions underpinning disability income support policy and the legitimisation of certain policy positions on the basis of material structures (Brodin, 1993; Larsen, 2006; Leach, 1993; Riggins, 1997).

### **Williamson (1978) and the ideological construction of meaning**

Williamson's (1978) materialist analysis provides insight into the role played by ideology in disability income support policy. Williamson examines the way representations are constructed, and certain dominant models are legitimated. Williamson's ideas of representational systems and structures of meanings, through devices such as images and text, help to clarify the connections between social policy, ideology and the reproduction of hegemonic ideas. The relationship of Williamson's ideas to this study centres on the way in which policy language, and historical events, construct a particular world view in relation to disability income support policy (Fairclough, 1995; Kellehear, 1993, p. 63; Williamson, 1978).

### **Methodology: Applying Qualitative Research Strategies**

The inductive nature of the inquiry directed the researcher to employ a qualitative research approach. Qualitative research is used to "examine social processes ... in their social context, and look at interpretations or the creation of meaning in specific settings" (Neuman, 2006, p. 157). Researcher immersion in the context paved the way for understanding the meanings ascribed to social reality. The rich contextual findings of qualitative studies provide an important contribution, given the "enlightenment function" in influencing social policy across a range of policy areas, such as unemployment and poverty (Ezzy, 2002, p. 36). Identifying a methodology that seeks to maintain the integrity of the ontological and epistemological stances outlined above in addressing the research questions, directed the researcher to employ critical historical-comparative policy analysis methodology. By doing so, the study takes a critical social science approach including elements of interpretivism as detailed below.

Given the emphasis of this study on the historical dimension, it is important to acknowledge the tensions between social and historical research. Historians have used historiography to examine the past and generate a factual account of historical trends over time. These tensions have been subject to extensive debate (Baumeister, 1987; Stedman Jones, 2002; Str  th, 2005, 2007; Telman, 2007; Wagner, 2001). Telman (2007) points out that the

predominant criticism centres on the tendency for historical research to universalise particular accounts of the past. The emergence of post-modernist thought has led to debates calling for the inclusion of variation, such as plurality and difference in historical research.

In response to these criticisms, Str  th (2005, 2007) using a multidisciplinary approach incorporates social, political and economic dimensions into historical research. In a similar vein to Str  th (2007), this study adopts historical research techniques to help trace historically significant policy developments across particular time periods (Baumeister, 1987; Str  th, 2007). Noting the existing tensions and debates, this use of historical research is undertaken cautiously as the study does not encompass historiography, nor is the researcher claiming to be a historian. Rather, the study draws on historical policy research techniques to contextualise disability income support policy implications within and across particular points in time. This contextualisation assists in identifying specific ideologies within different eras to identify significant social changes in disability income support.

The purpose of using historical research techniques is to glean insights into the sequential and developmental changes associated with disability income support policy. The researcher agrees with Str  th (2007) that such an approach allows for variance occurring across several epochs, rather than the rigid classification of policy changes. As Str  th (2007) notes a cautious approach to variation prevents the undermining of “collectivist ontology” and helps the detection of important historical trends (p. 141).

### **Critical historical-comparative policy analysis**

The use of critical historical-comparative approaches has a long history in the social sciences (Bessant et al., 2006; Heidenheimer et al., 1990; Kennett, 2001, 2004; M  nson, 2000; Morrow, 1994; Roberts, 1997; Str  th, 2007; Telman, 2007). Whilst noting the existing tensions outlined in the previous section, critical historical-comparative policy research is used to identify the types of income support models and their structures (for example, structures of benefits) applied within a given country. In this study, a deeper level of analysis is sought in which critical historical-comparative methodology helps to reveal the properties, which underpin the adopted system of disability income support, rather than solely concentrate on “levels of social expenditure” as a key variable for examination (Castles, 1985; Castles & Mitchell, 1991; Cook, 2006; Kennett, 2004; Kewley, 1975; Saunders, 2005b, 2005c, [SPRC]).

The study goes beyond a merely descriptive account of the historical and comparative dimensions of the Australian disability income system and the alternative Basic Income model to locate the underlying forces which structure disability income support policies. For this study, critical historical-comparative research allows for examining the principles behind disability pensions and the consequences of disability income support policy (Cook, 2004,



2006; Dean, 1999; Gil, 1992; Gough, 1979, 2000; Hogwood & Gunn, 1984). Hence, the logical application of historical and comparative methodology allows for the detection of claims put forward by governments, particularly when they suggest that they are acting in the best interests of the people (Gil, 1992; Hogwood & Gunn, 1984; Reisigl & Wodak, 2009).

### **Research design logic and unit of analysis**

The study aims to provide a unique contribution to disability income support policy in that it addresses the complexity across two levels of analysis; that is, historical and comparative elements. The logic of the research design and unit of analysis for the present study required a single-nation (Denzin & Lincoln, 2001, 2005) critical historical-comparative policy analysis to:

- i. Explore across time (historical dimension policy analysis).
- ii. Compare two income support models (comparative analysis).

The use of the two dimensions within the study captures both the historical and contemporary nuances over a 100-year period, and the comparison between two contrasting income support models. From this, the study develops a Disability Income Support Analytical Framework, detailed below, to incorporate additional historical disability dimensions relevant for analysing disability income support policy.

#### *i. Explore across time (Historical dimension policy analysis)*

Understanding the nature of contemporary disability income support arrangements requires an historical examination of past policies and the relating of these policies to the social-material conditions of the time (Hicks & Esping-Andersen, 2005). In part, applying a comparative lens to critical historical policy analysis accounts for identifying the way varying historical epochs are each informed by a different set of socio-political conditions and institutional arrangements. Policy choices and solutions do not operate in isolation from political processes (Anderson, 1971; Bessant et al., 2006; Cook, 2006; Marston, 2004; Saunders, 2005b, 2005c, [SPRC]; Wharf & McKenzie, 1998). Bessant et al. (2006) and Johnson (1996) contended that within social policy, the shared theoretical insights allow for an exploration of the ideological assumptions associated with resource distribution strategies underpinning the disability income support system (C. Alcock et al., 2004; Kennedy, 1984; Pollard, 1992; A. Pratt, 1998, 2006; J. Pratt, 2006; Tulloch, 1979).

In the historical paradigm, historical research can be described somewhat differently from qualitative research (Babbie, 2010; Tierney, 2000). Although acknowledging the tensions, Denzin and Lincoln (2005) employ an alternative standpoint. They perceive the use of historical techniques in qualitative research as part of the existing multiplicity occurring in contemporary research. Denzin and Lincoln add that, while there are some complexities, historians applying post-positivist and post-structural approaches to qualitative studies “bring

different understandings and uses to the methods and findings of historical research” (p. 7). They note that historical research techniques help to shape and frame qualitative inquiry. Thus, in following Denzin and Lincoln (2005) and Stråth (2005, 2007) this qualitative study employs historical research techniques as a means to embed sources in the historical moment and generate an understanding of complex social, political and economic trends associated with disability income support policy. The approach adopted similarly aligns with the logic of critical historical-comparative policy analysis (Bessant et al., 2006; Gil, 1992).

Exploring historical dimensions is critical to this study for discerning across time aspects relevant to disability income support policy (Babbie, 2010; Bessant et al., 2006; Esping-Andersen, 1990; Hicks & Esping-Andersen, 2005; Hicks & Kenworthy, 2003; Messner & Rosenfeld, 1997; Saunders, 2005a, 2005b, 2005c, 2007, [SPRC]; Smyth, 1994). It is clear that examining historical patterns helps to identify what factors contribute to the dominance of the Australian targeted income support system for people with a disability, over an alternative model (Heidenheimer et al., 1990; Stråth, 2005, 2007). For example, discerning why a particular policy action is pursued by governments in power assists in recognising why it is that a particular disability income support policy is upheld as a “right” during one specific epoch, albeit somewhat conditional, whereas, in another time period it becomes subject to ideological attack (Heidenheimer et al., 1990; Stråth, 2005, 2007; Tulloch, 1979).

*ii. Compare two income support models (Comparative dimension policy analysis)*

In the present study, comparative policy research, used in conjunction with historical analysis, comprises a with-in nation analysis, rather than a comparison of different nation states for cross-national purposes (C. Alcock, 2004; Bessant et al., 2006).<sup>44</sup> C. Alcock et al. (2004) suggested that comparative analysis can be enhanced by studying the “method the state uses [as in welfare regime]” (p. 154) for income support provision, to help understand the intended and unintended policy consequences. As Bessant et al. (2006, p. 80) later contended, the relevance of welfare state regimes in comparative analysis lies in the capacity to identify the welfare state regime typology used in a country and interpret the “*actual*” consequences of income support policy, rather than the “*expected*” consequences. Clearly, as Bessant et al. (2006) illustrated, sound evaluation logic is required to understand the broader context in which disability income support is situated within the Australian welfare state.

The methodological relevance of the point made by C. Alcock et al. (2004) and Bessant et al. (2006) here is that some form of guiding framework is required as a starting point for

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<sup>44</sup> To date, there is a plethora of studies which embrace across-nation policy comparisons, for example Burlacu (2007), Esping-Andersen (2000a, 2000b), Kennett (2004), Nowak (1989), Pacek and Freeman (n.d.) and Pacek and Radcliff (2008). Similarly, comparative policy researchers (such as Bessant et al., 2006; Fried and Rabinovitz, 1980; and Heidenheimer et al., 1990), advocate the utility of with-in country analyses.

comparison across both income support models and time dimensions (epochs), particularly in identifying the underlying “abstract theoretical logic” of provision arrangements underpinning disability income support programs (Hicks & Esping-Andersen, 2005). The incorporation of the comparative dimension in this study helps to capture subtle details within a particular national disability income support system as well as between differing models of disability income support policy (that is, the Australian disability income support system and the alternative Basic Income model).

## Issues of Research Integrity

### Ethical considerations

Research involving disability income support policy using critical historical-comparative policy analysis methodology and critical discourse analysis method required a balance between ideological dimensions and the potential for subjectivity. As Goodin et al. (2000) suggested, trustworthiness of the research process comes about through the use of safeguards, such cross-checking data against other textual sources (intertextuality). Goodin et al. noted that:

It is thus important to eschew any temptation to rush to judgement. *It is altogether too easy to plump for one sort of welfare regime* [italics added] because it is the one supposedly most concerned with the value which is of most concern to you, without stopping to examine whether that welfare regime actually does what it is supposed to do, much less whether some other welfare regime altogether might champion that value less loudly while actually serving it more effectively. (p. 23)

The development of Disability Income Support Analytical Framework and the major historical epochs in the present study helped to minimise the potential for subjectivity during data collection, analysis and write-up. The critical discourse analysis method also provided strategies for responding to issues of subjectivity in this study. The notion of subjectivity is extensively debated in critical discourse analysis research (Fairclough, 2003, 2009; Taylor, 2001). Other safeguards used in the present study included an abridged approach to triangulation as proposed by Reisigl and Wodak (2009), which involved cross-checking data against other textual sources (intertextuality), and thick description through the use of comprehensive excerpts in the results sections (Bowen, 2006; Denzin & Lincoln, 2005; Ezzy, 2002; Flick, 2009; Hill, 1993; Kellehear, 1993; Miles & Huberman, 1994; Taylor, 2001). Wodak and Meyer (2009) state that triangulating across “different types of data” is highly relevant to a study using critical discourse analysis component in order to assess for quality in research findings and minimise the potential for bias or subjectivity (p.31). The three distinct data domain areas used in this study provided a means for triangulating the data. In generating the textual data corpus, the researcher then triangulated across the three data domain areas to strengthen the findings and conclusions of this study. Thus, for this study,

the transparency of conclusions came to be supported by the process of identification in which one data domain area (policy) was substantiated across another data domain area (media) and then the across the third data domain area (Taylor, 2001).

For this study involving critical discourse analysis method, the process of writing-up the analysis is distinct from other studies. This distinction can be seen in its “summary of selected findings” as opposed to a “record of process” (Taylor, 2001, p. 39). In the findings chapters of this study, the researcher presents thick descriptive extracts of the data, which are summaries of key themes used to illustrate specific instances of discursive formations or rhetorical devices (Fairclough, 2003, 2009; Taylor, 2001). These extracts can be identified in the data analysis chapters of this study (Chapters Four, Five and Seven).

In this study, the data was presented as italicised extracts contained in quotation blocks. For this study, the extracts become illustrative examples which are then summarised, explained (explanation of the findings) and justified by the researcher (Taylor, 2001). The extracts are supported by a reference to identify the author of the text and help the reader refer back to the data source within the policy, media or alternative text. These summaries also represent the common themes identified in other policy documents (Taylor, 2001). These supporting references are particularly important for this study whereby parliamentary speeches and media accounts of parliamentary speeches, especially during the first two epochs, were contained within the authoritative policy texts, such as Jordan (1984) and Kewley (1980). For example, if part of a parliamentary speech by the then Prime Minister Fisher (Epoch One) is used as an illustration, then the Prime Minister’s name or author’s name is provided and a reference cited for the reader to look for the data source (such as, Commonwealth of Australia, Senate, June 4, 1991a, p. 4272, Meg Lees, SA, Australian Democrats). In presenting rich excerpts for illustration, the different orders of discourse, discursive formations, rhetorical devices and ideology and structure can be depicted as data analysis evidence. The approach applied in this study to presenting the findings is similarly used by Hammersley and Atkinson (1995), R. Harding (2006), Reisigl and Wodak (2009), Taylor (2001) and van Dijk (1993).

The richness and volume of the data collected by the researcher meant that extracts and summaries were the most appropriate for this study in order to illustrate key themes (Reisigl & Wodak, 2009; Taylor, 2001). Potter and Wetherell (1987) and Taylor (2001) point out that the generation of a large textual corpus is not unusual in research such as this. These researchers and this researcher argue that although the structure of the findings by use of excerpts can be open to criticisms of being “less open”, there is a higher degree of transparency given that the presentation of extracts has supporting references to follow up on and a summary explanation (Taylor, 2001). Therefore, this structure for reporting on the analysis and findings is highly relevant for this study (Potter & Wetherell, 1987; Taylor,

2001), which sought to depict an illustration of the emergent key themes across a large textual data corpus.

A further ethical consideration by the researcher was the politically sensitive nature of the content of the present study's documentary sources and subsequent findings. Kellehear (1993) noted that documents can be censored by the government, particularly if the material is deemed "sensitive" or classified as "confidential". Even a government with well meaning intentions toward the collective good of the country can react negatively to the findings of particular research inquiries. Hill (1993) supported this statement by outlining that:

Archival research holds the power to confirm as well as to disturb our collective legitimations. Archival discoveries are ... threatening to established reputations and the hegemony of the status quo. Archival [and textual] work is never the safe road, because we know not where it leads – or who may want to lead us in one direction rather than another. Visitors to the archival past should never forget, as [Erving] Goffman reminded us, that we can never really know when we are being duped by others – or by ourselves. (p. 7)

Alongside these ethical considerations, the researcher used additional techniques of accuracy checks, theoretical notes and process notes to uphold rigour, credibility and trustworthiness of the study.

## **Rigour**

Drawing on the strategies advanced by qualitative researchers, such as Glesne (1999) and Silverman (2009), and critical discourse analysis researchers, such as Fairclough (2003, 2009) and Taylor (2001), the researcher used research credibility, verification, confirmability and transparency, as opposed to notions of validity and reliability (Yin, 1994).<sup>45</sup> The study addressed issues of credibility, verification, confirmability and transparency (Blaxter, Hughes & Tight, 2010; Flick, 2009; Lincoln & Guba, 1985; Taylor, 2001; Willis, 2007) by using negative cases during analytic induction and accuracy checks (Taylor, 2001) with thesis supervisors to validate data interpretation. In order to uphold data dependability, an audit trail was devised to confirm the dependability of procedures (Blaxter et al., 2010; Flick, 2009; Taylor, 2001).

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<sup>45</sup> Many qualitative and discourse analysis researchers, such as Denzin and Lincoln (2000, 2005), Flick (2009), Miles and Huberman (1994, 2002), Minichiello, Aroni, Timewell and Alexander (1995), Reisigl and Wodak (2009), Taylor (2001) and Willis (2007) argued that the validity and reliability concepts do not really "fit" within the realm of qualitative research. These qualitative researchers raise the issue of the critique of some quantitative research in that it often addresses the wrong question by measuring only that which is measurable through quantitative tools. Thus, under these conditions, ideological features and other broader questions tend to be neglected (Denzin & Lincoln, 2005; Fairclough, 2003, 2009; Taylor, 2001).

Accuracy checks occurred through regular and ongoing meetings with thesis supervisors in which discussions were held concerning excerpts from the data, initial findings and emergent themes. Wodak and Meyer (2009) note that this strategy forms part of the triangulation process used to enhance the credibility of the findings. The researcher engaged in a constant process of checking back with supervisors to validate the findings of the data analysis and uphold transparency in the findings (Wodak & Meyer, 2009). The researcher also regularly participated in formal conceptual meetings with peers and one supervisor, to report on findings, integrate theory and discuss emerging patterns in the data. Theoretical notes were made on memos during data analysis reduction (Strauss & Corbin, 2008). Critical discourse analysis researchers, such as Taylor (2001) suggest that qualitative strategies proposed by qualitative researchers, such as Silverman (2009), are highly relevant for maintaining the rigour of studies, such as this one, incorporating critical discourse analysis.

Figure 13 below provides an example of a policy and discourse analysis theoretical note on a theme surrounding Invalid Pension eligibility Epoch One and Epoch Two.

**Theoretical Note: September 2007 (Jordan, 1984, Text). Some themes**

The granting of an Invalid Pension in Epoch One is closely tied to *medical* and *charitable assumptions* and *authority discourse* in making determinations of eligibility. I came across an important excerpt whereby the person with a disability was said to be “*unemployable but not eligible medically for IP*” (AJ1.1.85). The issue centres on medical criteria and assumptions about the “*capacity to work*”. Medical criteria determined “*permanent incapacity*”. Of interest here is that eligibility decisions somewhat relied on the socio-economic circumstances of people with a disability (Epoch One). Link in with Oliver (1999). This illustration constitutes the emergence and constitution of discursive formations surrounding the construction of disability. This construction includes the features which exemplify representations (Fairclough, 2009; Reisigl & Wodak, 2009).

This idea changed towards the end of Epoch Two whereby there was a concern for increased numbers receiving the Invalid Pension. E.g. Case “*1971: Rebuked the existing tendency to grant on sympathetic humanitarian not strictly medical criteria*” (AJ1.1.85a). I need to look further at how the government discursively constructs their stance, together with the implications and the ideology. The pattern starting to show is the ideological change in latter Epoch Two. The decisions returned to purely medical criteria to determine eligibility, while ignoring perceived “*humanitarian*” grounds, that is, the social circumstances of the individual. Other patterns to look for include discursive formations and devices. For example, how does the government determine eligibility criteria, and what are the discursive influences (e.g. devices) which engender support for these criteria?

**Figure 13:** Research rigour: Example theoretical note

Process notes (methodological notes) were used for recording methodological decisions and assessing the credibility of the findings (Flick, 2009; Miles & Huberman, 1994, 2002; Strauss & Corbin, 2008; Taylor, 2001). Figure 14 below outlines one example of research rigour used in the study in the form of a process (methodological) note. Using the Jordan (1984) text extract in the process note, the example reveals some of the discursive devices, ideological

dimensions and changing ideas surrounding eligibility for the Invalid Pension (Epoch Two). It also highlights the policy trajectory theme of Commonwealth authority and paternalism, emerging from the data (researcher notes in italics).

Process notes, as a strategy helped to strengthen the *authenticity* principle of rigour in the study (Taylor, 2001). The strategy also supports the transcription structure in data analysis write-up used in this study. Rigour was upheld in using process notes to uphold the logic and quality of the transcript and level of detail (Taylor, 2001). The researcher also detailed in process notes, similarities and contradictions found in other texts, such as Kewley (1980).

**Process (Methodological) Note: October 2007 (Jordan, 1984, Text). Epoch Two – Eligibility**

**AJ1.1.94** (p. 169): “Discrepancies across states, subjective interpretation, disagreement and agreement about eligibility of given category, differences in practices, no clear right or wrong, cause of uncertainty” (*no consistency*). **AJ1.1.95** (p. 173): “quite grossly disabled by bad back, hysteric, disabling symptoms: ‘belief in mind that unable to work’”. p. 174: “Will recover if withhold IP. Use IP ... to achieve a sense of security for future” (*Commonwealth authority: reasons for rejecting cases*). **AJ1.1.97**: “History of manipulation & no permanent incapacity” (*conservative paternalism, regulation*). **AJ1.1.102**: “Marginality & isolation: effects of such medical conditions as they might suffer from, had not been closely integrated into the general community either socially or economically. Easier to define eligibility with physical disability but not always straightforward” (*Policy trajectory*). **AJ1.1.106** (p. 197): Injury, illness & the invalid role. “Disabled to a pensionable degree”; “functional” and “basic genuine disability”; “inadequate person” and “little battler” (*conservative paternalism*). These properties reveal the paternalistic assumptions made by the government. Under certain conditions, the government was: stricter in its determinations or “generous” in deciding who “deserves” an Invalid Pension. Discursive devices were used (for example, decisions surrounding conceptualisation of disability and supporting arguments used by a government). Potential discursive categories: *Commonwealth authority and conservative paternalism*. Explore use of language to construct “disability” and “pensionable disability”. Check against Kewley (1980). Follow up on discourse and concepts, e.g. “battler” and “plight”.

**Figure 14:** Research rigour: Example process note

During data collection, additional notations were made concerning temporal changes, the “sequencing of events”, and any emerging discrepancies, to prevent the tendency for “anachronism fallacy” (Verbeeck, 2006). Verbeeck (2006) notes that in historical and discourse analysis, an anachronism fallacy is an error in detecting events prior to or following the occurrence of such events. Lee (2000, p. 63) advanced that “running records” (as in, chronologies and newspaper articles) are useful to address such issues, given that running records are “*socially situated products*” as they provide a factual record of society over time. He argued that in conjunction with other data collection strategies, “running records allow trends to be established, permit the exploration of temporal patterns and provide

opportunities for quasi-experimentation” (p. 63). Employing Lee’s (2000) strategy to prevent anachronism fallacy, the researcher accessed several Commonwealth Government sources of running records, such as Chronologies online, which provided a synopsis of key changes to disability pensions from 1908 to 2007. This attention to detail helped to preserve the integrity and authenticity of the data including the credibility of the findings.

The researcher acknowledges that any study involving textual sources as documentary evidence carries with it a range of criticisms around rigour, such as selective influence (Fairclough, 2003, 2009; Lemke, 1995; Wodak & Meyer, 2009). Critical discourse analysis researchers, such as Fairclough (2003, 2009) and Wodak and Meyer (2009), point out the need for maintaining rigour by using quality criteria to ensure transparency in the research process. An example of transparency and quality criteria applied in this study can be seen in the sampling selection process, whereby explicit criteria to assess the quality of the texts were used (see Table 3 and Reisigl and Wodak, 2009). The data selected and presented in Chapters Four, Five and Seven is open to criticisms of selective influence given that not all textual sources can be identified, recorded or displayed (Fairclough, 2009; Wodak & Meyer, 2009). Denzin and Lincoln (2005), Taylor (2001) and Wodak and Meyer (2009) suggest using triangulation as a means to ensure the validity of the study, and to align the historical dimension of critical discourse analysis with the comparison dimension. The orientation is predominantly *theoretical* and involves accounting for discourses in policy texts, intertextuality, and broader historical and socio-political context. Moving across these levels and checking across a range of documentary sources during data analysis helped to reduce the propensity for research bias (Reisigl & Wodak, 2009; Wodak & Meyer, 2009).

## **Section Summary**

Crotty’s (2003) framework assisted in giving structure and rigour to conduct the study. The ontology of historical materialism allowed for examining the social-relational aspects, as in the social and material dimensions of disability income support policy. The inductive nature of the research provided a strategy for exploring the historical patterns and ideological dimensions that shaped the Australian disability income support system and led to the model’s predominance over alternative models (such as Basic Income). Critical social science as an epistemology helped to understand the implications of policy constructions associated with the Australian disability income support system and the alternative, the Basic Income model. The theoretical perspective orienting the research design is informed by the critical theory tradition using Gramsci’s (1977, 1996) theory of hegemony and Williamson’s (1978) work on ideology and the construction of meaning central to disability income support policy. The ontological, epistemological and theoretical perspectives pointed to the need for a qualitative methodology of critical historical-comparative policy analysis.



Critical historical-comparative policy analysis forms the central methodological approach to the study. This section outlined the relevance of using historical and comparative dimensions of policy analysis with an extension to the core components of welfare state regime typology to frame the research logic. The section also explored some of the contentions relating to the historical research and qualitative research methodologies. The researcher suggested an abridged use of historical research techniques to manage these tensions. This methodology allowed for a critical, historical-comparative policy analysis across time and model comparison specific to disability income support provision. It also generated consideration of the ideological elements of policy. In turn, these methodological assumptions directed the researcher to the particular method by which to conduct the study.



## APPENDIX TWO

### Example Application of Data Collection Strategies for Historical Dimension

#### (Australian Disability Income Support System)

Table 2.1 below provides a brief overview of the each data domain area, justification for data sources and example data sources relevant to the domain area for the Australian disability income support system. The textual data domain areas, text descriptors and major historical were used in the initial search to identify data sources for analysis. The researcher drew on the sampling selection criteria of *authority, authenticity, credibility, theoretical applicability, accessibility* and *function* (Fairclough, 2003), together with five historical discourse research criteria (*specific political units, specific time period, specific social and political actors, specific discourses and semiotics* and *specific policy fields of political action*) (Reisigl & Wodak, 2009) to further manage data collection and identify relevant data sources for analysis. Following the table, a brief discussion outlines some of the considerations underpinning the data collection phase.

**Table 2.1 Application of Data Collection Strategies for Historical Dimension**

Data Domain Areas	Justification	Example Data Source
Epoch One (1908 to 1940)		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> <li>• Generates rich detailed account of policy practices and ideology.<sup>46</sup></li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>• Research policy reports (Heathershaw, 1935; Jordan, 1984).</li> <li>• Online chronologies (Daniels, 2006).</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Identify framing of events and codified meanings.</li> <li>• Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>• Research policy reports (Jordan, 1984).</li> <li>• Government media reports of parliamentary speeches (<i>Sydney Morning Herald</i>, 1934; <i>The Age &amp; The Argus</i>).</li> <li>• Media reports on policy changes (<i>The Age</i>).</li> </ul>

<sup>46</sup> This notion is supported by Connor (2007), Fairclough (1995, 1999, 2003, 2009), Fairclough and Wodak (1997), Hall et al. (1978, 2006), Kincheloe and McLaren (2005), Marston (2004), Reisigl & Wodak (2009), Taylor (2001), Thompson (2003), Torfing (2005), van Dijk (1993, 1997a, 1997b, 1998) and Weakliem (2005).

<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Forum for understanding alternative views to the dominant ideology.</li> <li>• Inclusive of pictorial images: Political cartoons.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy texts (Kewley, 1980; Tulloch, 1979).</li> <li>• Political cartoon (National Library of Australia &amp; Vision Australia).</li> <li>• Policy commentary.</li> </ul>
<b>Epoch Two (1941 to 1985)</b>		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> <li>• Generates rich detailed account of policy practices and ideology.</li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>• Research and policy reports (Daniels, 2006; Jordan, 1984).</li> <li>• Policy Report (Myers, 1977).</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Identify framing of events and codified meanings.</li> <li>• Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>• Government media reports of parliamentary speeches (Fraser, 1979).</li> <li>• Transcripts of radio interviews (Australian Broadcasting Corporation [ABC]).</li> <li>• Press articles on policy directions (<i>Sydney Morning Herald</i>).</li> </ul>
<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Forum for understanding alternative views to the dominant ideology.</li> <li>• Inclusive of pictorial images: Political cartoons.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy texts (Kewley, 1980; Tulloch, 1979).</li> <li>• Political cartoon (National Library of Australia &amp; Vision Australia).</li> <li>• Policy Report (Myers, 1977).</li> </ul>
<b>Epoch Three (1986 to 1995)</b>		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> <li>• Generates rich detailed account of policy practices and ideology.</li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>• Government ministerial speeches.</li> <li>• Online chronologies.</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> </ul>	<ul style="list-style-type: none"> <li>• Government media reports of parliamentary speeches (Howe, 1989).</li> </ul>

	<p><i>function and five historical discourse research criteria.</i></p> <ul style="list-style-type: none"> <li>Identify framing of events and codified meanings.</li> <li>Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>Transcripts of radio interviews (Australian Broadcasting Corporation [ABC]).</li> <li>Press articles on policy directions (<i>Sydney Morning Herald</i>).</li> </ul>
<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li><i>Authority, authenticity, credibility, theoretical applicability, accessibility and function.</i></li> <li>Forum for understanding alternative views to the dominant ideology.</li> <li>Inclusive of pictorial images: Political cartoons.</li> </ul>	<ul style="list-style-type: none"> <li>Political cartoon (National Library of Australia &amp; Vision Australia).</li> <li>Policy submissions to the Australian Senate (Tomlinson, 1988).</li> <li>Conference Proceedings (VCOSS &amp; Good Shepherd, 1995).</li> </ul>
<b>Epoch Four (1996 to 2007)</b>		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li><i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>Sources contain detailed information on major policy debates, statements and snapshots.</li> <li>Generates rich detailed account of policy practices and ideology.</li> </ul>	<ul style="list-style-type: none"> <li>Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>Newman (1999) digital policy document.</li> <li>McClure (2000) digital policy document.</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li><i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>Identify framing of events and codified meanings.</li> <li>Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>Government media reports of parliamentary speeches (prime ministerial national address, Howard, 2006).</li> <li>Transcripts of radio interviews (Australian Broadcasting Corporation [ABC] <i>Radio National</i>).</li> <li>Press articles on policy directions (<i>The Courier Mail</i>).</li> </ul>
<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li><i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>Forum for understanding alternative views to the dominant ideology.</li> <li>Inclusive of pictorial images: Political cartoons.</li> </ul>	<ul style="list-style-type: none"> <li>Political cartoon (National Library of Australia &amp; Vision Australia).</li> <li>Policy submissions (ACOSS).</li> <li>Policy commentary articles on policy changes (<i>Green Left Weekly</i>).</li> </ul>

## Discussion

The researcher used a range of technologies to access collections of online resources, publications and research literature. The systems assisted the web-based research component of the data collection phase and incorporated the following:

- Authoritative international search engines (Google, <http://www.google.com>).
- Digital collections and archival repositories, such as:
  - ParInfo Web, Parliamentary Document Repository (<http://www.parinfoweb.aph.gov.au/piweb/index.aspx>).
  - PANDORA Digital Archiving System, Australian National Library (<http://www.pandora.nla.gov.au/apps/PandasDelivery/WebObjects/PandasDelivery.woa>).
  - MINERVA (Basic Income Guarantee Australia [BIGA]; Basic Income Earth Network [BIEN]).
  - Australian e-print archives: QUT ePrints (<http://www.qut.edu.au>) and Monash University ePrint Repository (<http://www.pandora.nla.gov.au/otherpeoplesarchives.html>).

The textual data sources included government and non-government documents, online chronologies and existing survey research, text policy documents, Parliamentary Hansard and press releases, international reports and historical records. The transcriptions of Parliamentary debates recorded between the time period 1981 and 2007 were searched via on-line methods (Parliament of Australia website) from the following web links:

- Senate: <http://www.aph.gov.au/hansard/hanssen.htm>
- The House of Representatives: <http://www.aph.gov.au/hansard/hansreps.htm>

Parliamentary data sources, such as, questions on notice, were valuable data given that these documents tended to concentrate on factual prescriptive arguments without the rhetoric customarily found in parliamentary speeches. Hansard records and media related documents (such as the Australian Broadcasting Corporation [ABC] Doorstop Interviews or transcribed television and radio discussions relevant to parliamentary speeches were made publicly available via <http://www.abc.net.au>) are highly useful in textual research, because these documents are already transcribed and contain a degree of detail within the transcripts. These textual data sources are also readily available for public consumption (Kincheloe & McLaren, 2005).

The importance of capturing opposing discourses is that alternative viewpoints of particular policy approaches draw attention to the often hidden unintended consequences of policy changes (Davidson, 1992; Fairclough, 2003, 2009; Kincheloe & McLaren, 2005). Bessant et al. (2006), Connor (2007) and Fairclough (2003, 2009) further highlighted the relevance of incorporating counter-viewpoints in the data collection phase of the study. Policy and media documents can represent the ideas of particular dominant mainstream interests, whereas alternative public discourse can provide a counter-viewpoint in terms of a differing view of

social reality (Davidson, 1992; Fairclough, 1995, 2003, 2009; Gramsci, 1977, 1996; Marwick, 1970, 2001; Reisigl & Wodak, 2009; Taylor, 2001; Thompson, 2003; van Dijk, 1998). A case in point is from Ray Cassin (2000)<sup>47</sup> of the *Sunday Age* newspaper. Cassin (2000) presented an alternative reality to that of the government's viewpoint of the mutual obligation scheme by suggesting that "the ideal of mutual obligation underpinning a system of social security is not one of reciprocity, but of obligation borne by all of us to contribute to the support of people who would otherwise be destitute (p. 22). Such public discourses, in contrast to the mainstream, are critical to the present study as they yield important information concerning the contradictions underpinning disability income support policy. Thus, the alternative public discourse domain provided an inclusive space for independent texts.

Pictorial material represented as political satire (cartoons) supplemented data collection and data analysis. Thus, relevant copyright permission was sought and granted. Although these political cartoons and images are publicly accessible, copyright permission was required from relevant authorities, such as the National Library of Australia and Vision Australia. In other instances permission was granted via direct correspondence with the author of political cartoons. As part of maintaining integrity of the study and generating an audit trail, copies of these written permissions are held in hard and electronic copy within a secured room and locked filing cabinet.

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<sup>47</sup> Source is: Cassin, R. (2000). "Let's just call them leeches and be done with it." *The Sunday Age*, 27<sup>th</sup> August, p. 22.





## APPENDIX THREE

### Example Application of Data Collection Strategies for Comparison Dimension

#### (Basic Income)

Table 3.1 illustrates each textual data domain area, justification for data sources and example data sources relevant to the domain area concerning the alternative Basic Income model. Early data collection focused on using the textual data domain areas, text descriptors and major historical were used to identify sources for data analysis. From there the same sampling selection criteria of *authority, authenticity, credibility, theoretical applicability, accessibility* and *function* (Fairclough, 2003), together with five historical discourse research criteria (*specific political units, specific time period, specific social and political actors, specific discourses and semiotics* and *specific policy fields of political action*) (Reisigl & Wodak, 2009) were applied to limit data collection and identify relevant text and document sources for data analysis.

**Table 3.1 Application of Data Collection strategies for Comparison Dimension**

Data Domain	Justification	Example Data Sources
Epoch One (1908 to 1940)		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>• Research policy reports (Jordan, 1984).</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>• Research policy reports (Jordan, 1984).</li> <li>• Government media reports of parliamentary speeches (<i>Sydney Morning Herald</i>, 1934; <i>The Age &amp; The Argus</i>).</li> </ul>
<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Comparison model dimension to capture alternative views to the dominant ideology.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy texts (Kewley, 1980; Milner, 1920; Tulloch, 1979).</li> <li>• Policy commentary.</li> </ul>
Epoch Two (1941 to 1985)		
<i>Policy</i>		

This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>• Research policy reports (Jordan, 1984).</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>• Research policy reports (Jordan, 1984).</li> <li>• Government media reports of parliamentary speeches (<i>Sydney Morning Herald</i>).</li> </ul>
<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Comparison model dimension to capture alternative views to the dominant ideology.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy texts (Kewley, 1980; Tulloch, 1979).</li> <li>• Background articles (ACTCOSS News).</li> </ul>
<b>Epoch Three (1986 to 1995)</b>		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> <li>• Policy texts (Cass, Gibson &amp; Tito, 1988).</li> </ul>
<i>Dominant Mainstream Media</i>		
This domain represents media involved in the production and distribution of policy texts across a wide audience.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>• Media reports of alternatives (<i>Sydney Morning Herald</i>).</li> <li>• Policy texts (Van Trier, 1995).</li> </ul>
<i>Alternative Public Discourse</i>		
This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Comparison model dimension to capture alternative views to the dominant ideology.</li> </ul>	<ul style="list-style-type: none"> <li>• Hansard Senate submissions (Tomlinson, 1988).</li> <li>• Conference Proceedings (VCOSS &amp; Good Shepherd, 1995).</li> </ul>
<b>Epoch Four (1996 to 2007)</b>		
<i>Policy</i>		
This domain reflects relevant policy documents and reports which are official statements from the policy sphere.	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical</i></li> </ul>	<ul style="list-style-type: none"> <li>• Official parliamentary documents online via Parliament of Australia website (<a href="http://www.australia.gov.au/">http://www.australia.gov.au/</a>).</li> </ul>

	<p><i>discourse research criteria.</i></p> <ul style="list-style-type: none"> <li>• Sources contain detailed information on major policy debates, statements and snapshots.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy texts (Van Trier, 1995).</li> </ul>
<i>Dominant Mainstream Media</i>		
<p>This domain represents media involved in the production and distribution of policy texts across a wide audience.</p>	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Examine media-based data sources collected from online, newsprint, radio or secondary (policy reports) sources.</li> </ul>	<ul style="list-style-type: none"> <li>• Media reports of alternatives (Brotherhood of St Laurence).</li> <li>• Press articles (<i>The Courier Mail</i>).</li> </ul>
<i>Alternative Public Discourse</i>		
<p>This domain area captures the oppositional voices to the dominant discourses (as in, policy analysts).</p>	<ul style="list-style-type: none"> <li>• <i>Authority, authenticity, credibility, theoretical applicability, accessibility and function and five historical discourse research criteria.</i></li> <li>• Comparison model dimension to capture alternative views to the dominant ideology.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy texts (Standing, 2002, 2009)</li> <li>• Conference Proceedings (BIEN, 2006).</li> </ul>



## APPENDIX FOUR

### Historical Dimension (Australian Disability Income Support) Textual Corpus

This appendix details the selected textual corpus for analysis of the historical dimension (Australian disability income support). Table 4.1 below contextualises the textual corpus in relation to the major historical epochs in disability income support provision used with the sampling selection criteria (*authority, authenticity, credibility, theoretical applicability, accessibility and function*) and historical discourse analysis research criteria of *specific policy units, specific time periods, specific social and political actors, specific discourses and semiotics and specific policy field of political action*.

**Table 4.1 Major Historical Epochs and Distinctive Characterising Themes**

Epoch One	<ul style="list-style-type: none"><li>•1908-1940</li><li>•'Plight of Invalidism': Enactment &amp; Implementation of the Invalid Pension</li></ul>
Epoch Two	<ul style="list-style-type: none"><li>•1941-1985</li><li>•Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)</li></ul>
Epoch Three	<ul style="list-style-type: none"><li>•1986-1995</li><li>•A 'Liberalising' Change? <i>Activ[e]</i>ating the Disability Support Pension</li></ul>
Epoch Four	<ul style="list-style-type: none"><li>•1996-2007</li><li>•The 'Disabled Bludger': A Shift From Plight of the Invalid &amp; Genuinely Unemployed</li></ul>

Table 4.2 provides a snapshot of the five key textual data sources that covered the data domain areas.

**Table 4.2 Snapshot of Policy Text Sources**

<b>MAJOR HISTORICAL EPOCH</b>	<b>DATA SOURCE</b>
Epoch One 1908-1940	<ul style="list-style-type: none"> <li>• Jordan (1984)</li> <li>• Kewley (1980)</li> <li>• Heathershaw (1935)</li> </ul>
Epoch Two 1941-1985	<ul style="list-style-type: none"> <li>• Jordan (1984)</li> <li>• Kewley (1980)</li> <li>• Heathershaw (1935).</li> </ul>
Epoch Three 1986-1995	<ul style="list-style-type: none"> <li>• Cass Review (Cass, Gibson &amp; Tito, 1988)</li> </ul>
Epoch Four 1996-2007	<ul style="list-style-type: none"> <li>• Newman (1999)</li> <li>• The McClure Report (Reference Group on Welfare Reform, 2000)</li> <li>• Senate Inquiry into Poverty (Commonwealth of Australia, 2004)</li> </ul>

**Epoch One 1908-1940** *'Plight of Invalidism': Enactment & implementation of the Invalid Pension*

DOMAIN AREA	DOCUMENT
Policy	<ul style="list-style-type: none"> <li>Daniels, D. (2006). Background Notes. Retrieved from: <a href="http://www.aph.gov.au">http://www.aph.gov.au</a></li> <li>Jordan, A. (1984). Permanent incapacity: Invalid Pension in Australia. Research Paper No. 23. Research and Statistical Branch, Development Division, Department of Social Security. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au">http://www.basicincome.qut.edu.au</a></li> <li>Heathershaw, J. T. (1935). The Invalid and Old-age Pension Act 1908-1935: Instructions issued for the guidance of Deputy Commissioners. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au">http://www.basicincome.qut.edu.au</a></li> <li>Kewley, T. H. (1980). <i>Australian Social Security today: Major developments from 1900 to 1978</i>. Sydney: Sydney University Press.</li> <li>Tulloch, P. (1979). <i>Poor policies: Australian income security 1972-77</i>. London: Croom Helm.</li> </ul>
Dominant Mainstream Media	<ul style="list-style-type: none"> <li>The Sydney Morning Herald. (1934, September 17). Victory Speech: Joseph Lyons, Prime Minister (United Australia Party), Melbourne: September 16, 1934. Retrieved from: <a href="http://www.thesoapbox.unimelb.edu.au/media">http://www.thesoapbox.unimelb.edu.au/media</a></li> <li>The Sydney Morning Herald, The Argus &amp; The Age. (1934, August 14). Policy launch speech: Joseph Lyons, Prime Minister (UAP), delivered in the Sydney Town Hall, August 13, 1934. Retrieved from: <a href="http://www.thesoapbox.unimelb.edu.au/media">http://www.thesoapbox.unimelb.edu.au/media</a></li> </ul>
Alternative Public	<ul style="list-style-type: none"> <li>Jordan, A. (1984). Permanent incapacity: Invalid Pension in Australia. Research Paper No. 23. Research and Statistical Branch,</li> </ul>

Discourse	Development Division, Department of Social Security. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au">http://www.basicincome.qut.edu.au</a>
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**Epoch Two 1941-1985** *Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)*

DOMAIN AREA	DOCUMENT
Policy	<ul style="list-style-type: none"> <li>Commonwealth of Australia. (1975a). <i>Australian Government Commission of Inquiry into poverty: Poverty in Australia Vol. 1.</i> Henderson Poverty Report. Canberra, Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.big.a.qut.edu.au">http://www.big.a.qut.edu.au</a></li> <li>Commonwealth of Australia. (1975b). <i>Australian Government Commission of Inquiry into poverty: Poverty in Australia Vol. 2.</i> Henderson Poverty Report. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.big.a.qut.edu.au">http://www.big.a.qut.edu.au</a></li> <li>Commonwealth of Australia. (1975c). Possibilities for social welfare in Australia: Priorities review staff. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.big.a.qut.edu.au">http://www.big.a.qut.edu.au</a></li> <li>Commonwealth of Australia. Department of Social Security. (1982). <i>Social Security Act 1947–1982/83 Budget proposals and other proposed changes.</i> Canberra, Australia: Commonwealth Government Printer.</li> <li>Commonwealth of Australia. House of Representatives. (1981a, November 18). Parliamentary debates (Hansard). Retrieved from: <a href="http://parlinfoweb.aph.gov.au/">http://parlinfoweb.aph.gov.au/</a></li> <li>Commonwealth of Australia. House of Representatives. (1981b, November 18). Parliamentary debates (Hansard), p. 2999. Retrieved from: <a href="http://www.parlinfoweb.aph.gov.au">http://www.parlinfoweb.aph.gov.au</a></li> <li>Commonwealth of Australia. House of Representatives. (1981c, November 18). Parliamentary debates (Hansard), p. 3209. Retrieved from: <a href="http://www.parlinfoweb.aph.gov.au/">http://www.parlinfoweb.aph.gov.au/</a></li> </ul>

	<ul style="list-style-type: none"> <li>• Commonwealth of Australia. (1984a). <i>Social Security Act 1947. Social Security legislation. No. 83/6551.</i> Canberra, Australia: Commonwealth Government Printer.</li> <li>• Commonwealth of Australia. (1984b). <i>Department of Social Security: Annual Report 1983-84.</i> Canberra, Australia: Commonwealth Government Printer.</li> <li>• Commonwealth of Australia. (2006). Age and Invalid Pension: Vol. 1: A compendium of legislative changes in social security 1908-1982. Canberra: Department of Families, Community Services and Indigenous Affairs. Retrieved from: <a href="http://www.facs.gov.au/">http://www.facs.gov.au/</a></li> <li>• Ingles, D. (1982). <i>Financing Social Security: An analysis of the contributory "social insurance" approach, Research Paper No. 19.</i> Canberra, Australia: Commonwealth Government Printer.</li> <li>• Jordan, A. (1984). Permanent incapacity: Invalid Pension in Australia. Research Paper No. 23. Research and Statistical Branch, Development Division, Department of Social Security. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au/">http://www.basicincome.qut.edu.au/</a></li> <li>• Kewley, T. H. (1980). <i>Australian Social Security today: Major developments from 1900 to 1978.</i> Sydney: Sydney University Press.</li> <li>• Meyers, D. M. (1977). <i>Inquiry into unemployment benefit policy and administration. Report for Minister for Employment and Industrial Relations and Department of Social Security.</i> Canberra, Australia: Commonwealth Government Printer.</li> <li>• Social Welfare Policy Secretariat. (1981, August). <i>Report on poverty measurement.</i> Canberra, Australia: Commonwealth Government Printer.</li> <li>• Tulloch, P. (1979). <i>Poor policies: Australian income security 1972-77.</i> London: Croom Helm.</li> </ul>
Dominant	<ul style="list-style-type: none"> <li>• Increases in invalid pension allowances. (1949, June 24). <i>Canberra</i></li> </ul>

Mainstream Media	<p><i>Times</i>, Friday, p. 1.</p> <ul style="list-style-type: none"> <li>• Millions spent on just 16 families: Should society try other ways tackling its social problems? (1975, July 22). <i>Northern Territory News</i>, p. 8.</li> <li>• Libs' tough line on welfare. (1982, May 6). <i>Northern Territory News</i>, p. 18.</li> <li>• Pullan, R. (1984). The wealthy grab more as the poor struggle harder. <i>The National Times</i>, January 27 to February 2, p. 8.</li> <li>• Sydney Morning Herald. (1981, March 28). A humane ruling. <i>Sydney Morning Herald</i>, n.p.</li> </ul>
Alternative Public Discourse	<ul style="list-style-type: none"> <li>• Baume, M. (1977). Fraser's welfare revolution. <i>Quadrant</i>, April, p. 5.</li> <li>• Manning, I. (1977). <i>Guaranteed income schemes and the future of social security in Australia</i>. Paper for WA Discussion Group, Précis by R. Gerritson, Advisor to Tom Uren, MP. Retrieved from: <a href="http://www.basicincome.qut.edu.au/">http://www.basicincome.qut.edu.au/</a></li> <li>• Smith, G. (1979). Welfare workers and confidentiality. <i>Legal Services Bulletin</i>, 4(5), 172-176.</li> </ul>

**Epoch Three 1986-1995 A 'Liberalising' Change? Activ[e]ating the Disability Income Support Pension**

DOMAIN AREA	DOCUMENT
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**Epoch Four 1996-2007** *The 'Disabled Bludger': A Shift From Plight of the Invalid & Genuinely Unemployed*

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## APPENDIX FIVE

### Comparison Dimension (Basic Income) Textual Corpus

In order to maintain logical consistency, the same data collection strategy that was used for the historical dimension was applied to the comparison dimension. The researcher applied the same selected domain areas of policy, dominant mainstream media and alternative public discourse and sampling selection techniques, (*authority, authenticity, credibility, theoretical applicability, accessibility and function* and historical discourse analysis research criteria of *specific policy units, specific time periods, specific social and political actors, specific discourses and semiotics and specific policy field of political action*), to locate documentary sources relevant to the alternative Basic Income model. This appendix details the selected textual corpus for analysis of the historical dimension (Australian disability income support). Table 5.1 below revisits the major historical epochs applied with the data domain areas and sampling selection criteria for identifying and selecting Basic Income policy texts for analysis.

**Table 5.1 Major Historical Epochs and Distinctive Characterising Themes**

Epoch One	<ul style="list-style-type: none"><li>•1908-1940</li><li>•'Plight of Invalidism': Enactment &amp; Implementation of the Invalid Pension</li></ul>
Epoch Two	<ul style="list-style-type: none"><li>•1941-1985</li><li>•Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)</li></ul>
Epoch Three	<ul style="list-style-type: none"><li>•1986-1995</li><li>•A 'Liberalising' Change? <i>Activ[e]</i>ating the Disability Support Pension</li></ul>
Epoch Four	<ul style="list-style-type: none"><li>•1996-2007</li><li>•The 'Disabled Bludger': A Shift From Plight of the Invalid &amp; Genuinely Unemployed</li></ul>

Table 5.2 below shows a snapshot of the five key textual data sources that covered the data domain areas for Basic Income analysis.

**Table 5.2 Policy Texts Snapshot**

MAJOR HISTORICAL EPOCH	DATA SOURCE
Epoch One 1908-1940	<ul style="list-style-type: none"> <li>• Jordan (1984)</li> <li>• Kewley (1980)</li> <li>• Milner (1920)</li> <li>• Tulloch (1979)</li> </ul>
Epoch Two 1941-1985	<ul style="list-style-type: none"> <li>• Australian Government Commission of Inquiry into Poverty (Commonwealth of Australia, 1975a, 1975b, the <i>1975 Henderson Poverty Line</i>)</li> <li>• Commonwealth of Australia, Priorities Review Staff (1975c, "Possibilities for social welfare")</li> <li>• Jordan (1984)</li> <li>• Kewley (1980)</li> <li>• Tulloch (1979)</li> </ul>
Epoch Three 1986-1995	<ul style="list-style-type: none"> <li>• Cass Review (Cass, Gibson &amp; Tito, 1988)</li> <li>• Social Policy Research Centre (1989)</li> <li>• VCOSS &amp; Good Shepherd (Eds.). (1995) Conference Proceedings</li> </ul>
Epoch Four 1996-2007	<ul style="list-style-type: none"> <li>• Lo Vuolo and Raventós (2009)</li> <li>• Van Parijs (2002)</li> <li>• Raventós (2007)</li> <li>• Standing (2002, 2009)</li> <li>• Tomlinson (2000a, 2000b)</li> <li>• Van Trier (1995)</li> </ul>

**Epoch One 1908-1940** *'Plight of Invalidism': Enactment & implementation of the Invalid Pension*

DOMAIN AREA	DOCUMENT
<b>Policy</b>	<ul style="list-style-type: none"> <li>Jordan, A. (1984). Permanent incapacity: Invalid Pension in Australia. Research Paper No. 23. Research and Statistical Branch, Development Division, Department of Social Security. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au/">http://www.basicincome.qut.edu.au/</a></li> <li>Kewley, T. H. (1980). <i>Australian Social Security today: Major developments from 1900 to 1978</i>. Sydney: Sydney University Press.</li> <li>Tulloch, P. (1979). <i>Poor policies: Australian income security 1972-77</i>. London: Croom Helm.</li> </ul>
<b>Dominant Mainstream Media</b>	<ul style="list-style-type: none"> <li>Jordan, A. (1984). Permanent incapacity: Invalid Pension in Australia. Research Paper No. 23. Research and Statistical Branch, Development Division, Department of Social Security. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au/">http://www.basicincome.qut.edu.au/</a></li> </ul>
<b>Alternative Public Discourse</b>	<ul style="list-style-type: none"> <li>Milner, D. (1920). Higher production by a bonus on national output. A proposal for a minimum income for all varying with national income. London: George Allen &amp; Unwin. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> </ul>

**Epoch Two 1941-1985** *Invalid Pension Moral Transition: From Moral Right to Notion of 'Fraud' (Malingering)*

DOMAIN AREA	DOCUMENT
<b>Policy</b>	<ul style="list-style-type: none"> <li>Jordan, A. (1984). Permanent incapacity: Invalid Pension in Australia. Research Paper No. 23. Research and Statistical Branch, Development Division, Department of Social Security. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.basicincome.qut.edu.au/">http://www.basicincome.qut.edu.au/</a></li> <li>Kewley, T. H. (1980). <i>Australian Social Security today: Major developments from 1900 to 1978</i>. Sydney: Sydney University Press.</li> <li>Tulloch, P. (1979). <i>Poor policies: Australian income security 1972-77</i>. London: Croom Helm.</li> </ul> <p>Parliamentary Hansard and Submissions/Inquiries</p> <ul style="list-style-type: none"> <li>Commonwealth of Australia. (1975a). Australian Government's Commission of Inquiry into Poverty: <i>Poverty in Australia Vol. 1</i>. Henderson Poverty Report. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.bigga.qut.edu.au">http://www.bigga.qut.edu.au</a></li> <li>Commonwealth of Australia. (1975b). Australian Government's Commission of Inquiry into Poverty: <i>Poverty in Australia Vol. 2</i>. Henderson Poverty Report. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.bigga.qut.edu.au">http://www.bigga.qut.edu.au</a></li> <li>Commonwealth of Australia. (1975c). Possibilities for social welfare in Australia. Canberra, Australia: Commonwealth Government Printer. Retrieved from: <a href="http://www.bigga.qut.edu.au">http://www.bigga.qut.edu.au</a></li> </ul>
<b>Dominant Mainstream Media</b>	<ul style="list-style-type: none"> <li>Hall, R. (1975, September 29). The poverty of a guaranteed minimum income. <i>The Bulletin</i>, p. 25.</li> </ul>
<b>Alternative Public</b>	<ul style="list-style-type: none"> <li>Australian Broadcasting Commission. [ABC]. (1990, Jan 4). <i>Morning Show</i> (2CN, ABC Radio). Retrieved from:</li> </ul>

Discourse	<p><a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></p> <ul style="list-style-type: none"> <li>• Australian Council of Social Service. [ACOSS]. (1975a). <i>Guaranteed Minimum Income: Towards the development of a policy</i>. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Australian Council of Social Service. [ACOSS]. (1975b). The social objectives objectives and principles of a guaranteed minmum income scheme (John Coates). <i>Conference Proceedings of A Seminar on Guranteed Minimum Income</i> (pp. 5-15). Sydney: ACOSS, May 1975. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Australian Council of Social Service. [ACOSS]. (1976). Poverty Commission's Guaranteed Minimum Income proposals: Questions and issues raised. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Horne, S. (1970). A comparative note on guaranteed minimum income. <i>Australian Journal of Social Issues</i>, 5(2), 117-119. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Unemployed Workers Movement (Western Australia). (1979, July 28-29). <i>The guaranteed minimum income</i>. [Pamphlet]. First presented at the State Conference of UWU Perth. Perth, WA: Author. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Wiseman, John (1978). Power handout at the family centre? Review section. <i>Arena</i>, 51, 155-162. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> </ul>
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**Epoch Three 1986-1995 A 'Liberalising' Change? Activ[e]ating the Disability Income Support Pension**

DOMAIN AREA	DOCUMENT
<b>Policy</b>	<ul style="list-style-type: none"> <li>Commonwealth of Australia. House of Representatives. (1988, May 18). Standing Committee on Community Affairs: Social Security advice on pensions and benefits, Tomlinson (Hansard). Retrieved from: <a href="http://www.bigqut.edu.au">http://www.bigqut.edu.au</a></li> </ul>
<b>Dominant Mainstream Media</b>	<ul style="list-style-type: none"> <li>Australian Broadcasting Corporation. [ABC]. (1990). <i>Morning Show, 2CN, Interview with John Tomlinson (President, ACT Council of Social Services)</i>. Parliamentary Library transcripts. Retrieved from: <a href="http://www.bigqut.edu.au">http://www.bigqut.edu.au</a></li> </ul>
<b>Alternative Public Discourse</b>	<ul style="list-style-type: none"> <li>Lyons, M. (1989, October/November). [Review of the book <i>Basic income: Freedom from poverty, freedom to work</i>]. <i>Impact</i>, 27. Retrieved from: <a href="http://www.bigqut.edu.au">http://www.bigqut.edu.au</a></li> <li>McDonald, A. (1995). Universal income support: A discussion paper. Unemployment forever? Or a support income system and work for all. Unpublished paper. Retrieved from: <a href="http://www.bigqut.edu.au">http://www.bigqut.edu.au</a></li> <li>Mathews, J. (1986, November 19-21). <i>Rethinking the safety net. Australian Society</i>. Retrieved from: <a href="http://www.bigqut.edu.au">http://www.bigqut.edu.au</a></li> <li>Rankin, K. (1991). The universal welfare state: incorporating proposals for the Universal Basic Income. Policy Discussion Paper 12, Department of Economics, University of Auckland. Retrieved from: <a href="http://www.geocities.com/">http://www.geocities.com/</a></li> <li>Saunders, P. [SPRC]. (1987). GMI revisited. <i>ACTCOSS News</i>, (Nov-Dec), pp. 6-11. Retrieved from: <a href="http://www.bigqut.edu.au">http://www.bigqut.edu.au</a></li> <li>Saunders, P. [SPRC]. (1995). Conditionality and transition as issues in the Basic Income debate. In VCOSS &amp; Good Shepherd (Eds.), <i>The future of income support in an open economy: Basic Income revisited</i>. Melbourne: VCOSS &amp; Good Shepherd.</li> </ul>

	<ul style="list-style-type: none"> <li>• Social Policy Research Centre. [SPRC]. (Ed.). (1989). Social policy in Australia: What future for the welfare state? SPRC Reports and Proceedings, No. 81. Kensington, NSW: SPRC. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Victorian Council of Social Service [VCOSS] &amp; Good Shepherd (Eds.). (1995). Income Support in An Open Economy: Basic Income Revisited. Proceedings papers from the 1995 Basic Income Seminar. Melbourne: VCOSS &amp; Good Shepherd. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> <li>• Wiseman, J. (1991). A guaranteed adequate income scheme for Australia in the 1990s: Proposals and issues. Retrieved from: <a href="http://www.biga.qut.edu.au">http://www.biga.qut.edu.au</a></li> </ul>
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**Epoch Four 1996-2007** *The 'Disabled Bludger': A Shift From Plight of the Invalid & Genuinely Unemployed*

DOMAIN AREA	DOCUMENT
<b>Policy</b>	<ul style="list-style-type: none"> <li>Lo Vuolo, R., &amp; Raventós, D. (2009). Basic Income in times of grave economic crisis. Available from: Red Renta Básica (sección del Basic Income Earth Network). Xarxa Renda Bàsica (secció del Basic Income Earth Network). Retrieved from: <a href="http://www.redrentabasica.org">http://www.redrentabasica.org</a></li> </ul>
<b>Dominant Mainstream Media</b>	<ul style="list-style-type: none"> <li>Ensor, L. (2006, November 10). Skweyiya calls for basic income grant for poor: Manuel has warned against fostering culture of dependency. <i>Business Day</i>, pp. A1-A2.</li> <li>Mabuza, E. (2006, November 10). Protector clears Skweyiya of any conflict. <i>Business Day</i>, p. A3.</li> <li>Horin, A. (1999, December 14). The burden of disability. <i>Sydney Morning Herald</i> (News and Features), p. 4.</li> </ul>
<b>Alternative Public Discourse</b>	<ul style="list-style-type: none"> <li>Argyrous, G. (2002). Social security programmes as a shell game: Hiding the unemployed. <i>Human Rights Defender</i>, 11(3), 3-9.</li> <li>Haarmann, C., &amp; Haarmann, D. (2005). <i>The Basic Income Grant in Namibia resource book</i>. Retrieved from: <a href="http://www.cdhaarmann.com">http://www.cdhaarmann.com</a></li> <li>Haarmann, C., Haarmann, D., Jauch, H., Shindondola-Mote, H., Nattrass, N., van Niekerk, I., &amp; Samson, M. (2009). <i>Making the difference. The BIG in Namibia: Basic Income Grant Pilot Project Assessment Report, April 2009</i>. Basic Income Grant Coalition. Retrieved from: <a href="http://www.bignam.org">http://www.bignam.org</a></li> <li>It's welfare, Scottie – but not as we know it. (1998, April 23). <i>Waikato This Week</i>, p. 10.</li> <li>Lo Vuolo, R., &amp; Raventós, D. (2009). Basic Income in times of grave</li> </ul>



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## APPENDIX SIX

### Broader Discussion on Contextual History of Australian Debates on Basic income Proposals

This section explores in greater detail some of the challenges to the implementation of a universal Basic Income within the Australian context. The section scopes the four epochs.

#### Epoch One: Early debates on universal grants

Within Australia, during the 1930s, the political will of the time suggested a need and desire for a universal payment for older persons, however this tended to be in suggestion only. The reluctance on the part of politicians appears to have been based on concerns surrounding the cost of introducing universal measures:

*There were some [Parliamentarians, 1908] who were willing to pay lip service to the notion that the mere recognition of the principle of old-age pensions by the state implied, at least in theory, a universal scheme. However, when they came to action, they were deterred by the cost of such a scheme. (Kewley, 1980, p. 7)*

Further, the Kewley (1980) text noted that later parliamentary discussions were held around the type of income support method to adopt. Economic considerations often overrode the desire for universal citizenship rights (Kewley, 1980, p. 20). Fiscal priorities are not the only concern for dismissing such a universal model. The presumed need for incentives featured strongly in parliamentary debates (as demonstrated in Chapters Four and Five). Commonwealth leaders challenged the universal policy discourse through the use of incentive arguments. The desire for incentives as a hegemonic strategy is noted in the debates surrounding the implementation of the Blind Pension, as explained in Chapter Four.

The Blind Pension, in itself, represents a universal payment as it is not subject to means-testing. Perhaps most notably, the Jordan (1984) text raised issues of adequacy and equity in relation to the underpinning rationale of the Blind Pension and whether the reasons for a guaranteed income for people who are blind can be justified when compared to people in receipt of the Invalid/Disability Support Pension. The Blind Pension payment is a form of guaranteed income support in that it is unconditional and paid to all people who are blind. The introduction of a universal guaranteed income, with no other conditions attached, to people who are blind, raises critical questions surrounding the conundrum it generates. If government is so opposed to the ideology and principles of a universal scheme and the so-called “lack of incentives for work” (Jordan, 1984, p. 71), then it raises the question as to why this was introduced for the Blind Pensioners and not for Invalid Pensioners. The so-categorised Blind Pensioners did not encounter the same targeted assets- and means-tests as did other people with a disability under the Invalid Pension, nor the later Disability Support Pension. The rationale used by the government of the time was that Blind people were

“economic contributor[s] to the community” (PM & Treasurer Collins, 1930, cited in Jordan, 1984, p. 71) or should at least be encouraged to be self-reliant.

The privileging of the Blind Pension over the Invalid Pension and other pensions is evident in an excerpt from a parliamentary speech by the then Federal Member for Oxley, James Benjamin Sharpe in 1915:

*It is our desire that any blind person... shall be entitled to a full pension, irrespective of what his earnings may be. [In raising the issue again in 1916] .... **The cost... would be so light that the Commonwealth would hardly feel the strain of it,** [emphasis added] and great relief would be given to those who are suffering a terrible affliction ... All that is asked is that the pension shall be paid to them irrespective of any little earnings the recipients are able to make. (Cited in Jordan, 1984, p. 57)*

In this illustration, for the government, the costs of such a scheme do not feature in the discussions, given that the number of blind people was considered to be lower than so-classified “invalids”. This excerpt illustrates the charity discourse in terms of charitable sympathy, but also the belief that people who were blind could and would participate in the workforce. Hence, the incentive requirement argument forms a recurrent theme in disability income support policy. Over time, governments in power may have looked at tightening the requirements for the Blind Pension. However, the Blind Pension continues to the present day and remains a universal payment.

## **Epoch Two: Universal grants meet “it’s time for a change”**

The Whitlam Government during the 1970s attempted to pursue alternative income support policies based on social and economic rights, that is, guaranteed minimum income (Commonwealth of Australia, House of Representatives, 1988, Tomlinson; Saunders, 2005c, [SPRC]).<sup>48</sup> The Whitlam Government sought to explore further the potential relevance of such a scheme with an emphasis on “a just and equitable basis” for all citizens, of income support provision (Cited in Kewley, 1980, pp. 57-58). The Whitlam Government, as part of the Income Security Review Group (1975), detailed that the:

*first main report of the Henderson Poverty Inquiry, which proposed a guaranteed minimum income, and the eventual abolition of all existing pensions and benefits in the meantime. The Priorities Review Staff in July 1975 had also reported on a guaranteed minimum income.... There was a need to bring some coherence to the wealth of data and proposals in the reports of these and other committees of inquiry. It was for the purpose of assisting with this task that the Income Security Review Group was established in September 1975. (Cited in Kewley, 1980, pp. 43-44)<sup>49</sup>*

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<sup>48</sup> The notion of a guaranteed minimum income was historically used in Australian policy debates. Further conceptual developments have led to the application of the inclusive term: Basic Income.

<sup>49</sup> For a comprehensive review on the Henderson Poverty Line, refer to the Commonwealth of Australia (1975a, 1975b, 1975c) Report available via <http://www.biga.qut.edu.au>.

The Kewley (1980) text revealed the debates on universal income support, as shown in this extract: “the [Whitlam] government was proceeding with a review of the income security as a whole, including the effectiveness of guaranteed minimum income proposals in overcoming poverty” (p. 57). Most notably, the Kewley text is referring to the Henderson Poverty Report (Commonwealth of Australia, 1975a, 1975b, 1975c). Concern for “poverty traps” led the Whitlam Government to consider the implications of a guaranteed minimum income for disadvantaged people, in particular, people with a disability. An excerpt from the report demonstrates the concern for poverty traps:

*These improvements [such as improved pension rates] would do much for the alleviation of poverty. With pension rates at or above the poverty line, and with all people with a disability which hinders their earning an income eligible for pension or benefit, few would fall below the poverty line. However, the system would retain a number of inherent drawbacks which cannot be overcome without more radical reform.* (Commonwealth of Australia, 1975a, p. 67)

The claims made suggest that without a complete implementation of a guaranteed minimum income, governments would continue to use categories of disability as a basis for assessment of disability income support and rely on the complex array of different pensions and benefits. Both the categorical and administrative issues, the report suggested, remain counter to the principles underpinning a universal proposal.

### **The sidelining of debates on universal grants**

By the time of the Fraser Government, a guaranteed minimum income proposal was considered “out of favour” (Cited in Kewley, 1980, p. 44). Indeed as the Kewley (1980) text revealed, the findings of the project under the directive of the Whitlam Government were not made available in the public domain. In 1976, under the Fraser Liberal Government, the then Minister for Social Security, Senator Guilfoyle, claimed that:

*[The Government’s aim, is to rein in inflation, therefore] there could be no genuine return to prosperity and no sound base for Government to provide better and more effective assistance to the disadvantaged ... [and that] meanwhile the government was proceeding with a review of the income security system as a whole, including the effectiveness of guaranteed minimum income proposals in overcoming poverty. In the course of that review, a study was being made of all aspects of the pension and benefit programmes with a view to ensuring that the amounts of pensions and benefits were determined and updated on a just and equitable basis.* (Cited in Kewley, 1980, pp. 57-58)

The Kewley (1980) text suggested that the Fraser Government moved away from universal schemes because of the perceived need for fiscal constraint. However, as Chapters Four and Five detailed, there was a strong connection to preferences based on ideological imperatives, particularly the ideology of economic fundamentalism (ABC, 1990; Commonwealth of Australia, House of Representatives, 1988, Tomlinson).

### **Epoch Three and Epoch Four: Legacy of tighter targeting of disability pensions. The repression of any suggestion of universal grants**

The Hawke-Keating Governments (Epoch Three) while using the rhetoric of social justice, similarly discounted the relevance of universal models for disability income support policy (ABC, 1990; Commonwealth of Australia, House of Representatives, 1988, Tomlinson). Yet policy commentators (see ABC, 1990; Manning, 1997; A. McDonald, 2000; Saunders, 1995, [SPRC]; Tomlinson, 1996, 1998, 2000a, Ch. 7; VCOSS & Good Shepherd, 1995; Wiseman, 1991) argued for the Government to explore further the implementation of a guaranteed minimum income. For example, an excerpt from ACTCOSS (1991b) indicated:

*There is time for the [Hawke] Government and the alternative Government to come to their respective senses and introduce a secure income support system which will re-assure the people that no-one will be forced into hunger and homelessness. The ALP and the Democrats both have support for a guaranteed minimum income enshrined in their policy statements. (p. 5)*

Policy-commentator, Saunders (1987, [SPRC]), noted the different challenges, such as political and ideological obstacles, of implementing a Basic Income model within the Australian context. An excerpt from Saunders (1987, [SPRC]) highlights the obstacles:

*A universal income guarantee will only become a reality when the Australian Government finally comes to accept a pure economic definition of individual need – ‘a person has an entitlement for assistance provided his or her income is below a certain point’. Such a shift in emphasis would require the Government to do away with the idea of assistance being provided on the basis of some social need, which has been used to both limit the amount and quality of welfare services and to legitimise considerable inequalities in wealth and incomes. (p. 3)*

This account illustrates that although the call for universal schemes was extended, the Basic Income model was not taken up. Rather, the Hawke-Keating Governments and the Howard Government further tightened the conditions of the disability pensions.

The tendency to rely on the dominant forms of income support and the consequences that emerge from reliance on traditional targeted models are matters of concern. An extract from Tomlinson (2000a) shows that the issue becomes a matter not just of equality, but also one of equity:

*Clearly, to treat unequals equally is as unjust as treating equals unequally and many people experiencing profound impairments have needs some of which are quite different from those of 'able bodied' people. Such recognition lies at the heart of the difference between equality and equity. People with severe mobility impairments might 'need' a wheelchair and those who are blind a white cane. It is possible to guarantee all blind people a white cane and all those who can not walk a wheelchair. However, it would be more useful to incorporate in legislation an extended conception of the 'right to freedom of movement' so as to encompass more than the removal of politically repressive obstacles. (Tomlinson, 2000a, Ch. 7)*

In the excerpt, the discursive strategy suggests the need to address oppressive ideological tendencies in the income support models, rather than a return to disabling policies. It becomes obvious that within Australia across the four epochs, considerable interest in Basic Income has been generated. The critical reasons put forward by governments for not adopting a Basic Income model, centred on economic considerations. Yet, as the previous chapters (Chapters Four and Five) demonstrated, it is the ideological arguments that prevail, and governments tended to rely on traditional, dominant approaches to disability income support, that is, highly targeted systems.