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Who needs cash? The deservingness perceptions of Brazilian civil servants in cash-based social policy implementation

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Abstract

Drawing on existing European research findings, we assess factors driving Brazilian social security street-level officials' deservingness perceptions through survey and administrative data. Ordered regression analyses gauge the effects of socioeconomic status, social work academic background and face-to-face contact with the public on these officials' perceptions towards social assistance beneficiaries under seven deservingness criteria. A middle-class socioeconomic status increased the odds that beneficiaries are seen as undeserving under the criteria of social investment, control and reciprocity, while a high socioeconomic status is linked to benevolent perceptions of their need. A social work academic background is strongly linked to higher overall deservingness perceptions, whereas frequent face-to-face contact with the public can reduce them under the control deservingness criterion. The research takes a new step in the direction of deservingness survey studies, suggesting the formulation of new analytical frameworks and increasing policymakers' awareness of the importance of variables driving bureaucracy decisions.

KEYWORDS
Brazil, deservingness perceptions, social policy implementation, street-level bureaucrats

1 | INTRODUCTION

Currently, in public organisations, routine cases are handled in automatised and standardised ways. This has meant that the focus in the study, discretion, is now positioned at the core of civil servants' role in implementing public policies (Raaphorst & Groeneveld, 2018). Discretion has been studied by multiple research traditions through diverse perspectives, such as in terms of regulatory styles, individual economic behaviour, ethical decision making and the perspectives of grassroots-level bureaucrats (Loyens & Maesschalck, 2010). In our understanding, grassroots or street-level bureaucrats' perspectives combine all the aforementioned, as they consider both the regulatory environment and their clients' financial realities as well as their economic behaviour when exercising discretion. These agents are assumed to remain neutral in their decisions, but research has shown that they often rely on personal beliefs and norms about justice and fairness (Jensen, 2018).

These beliefs, when related to state-sponsored distributive justice, are exposed through people's *welfare attitudes*, a well-established concept in political science literature—often related to a welfare state's legitimacy and development (Korpi, 1980; Larsen, 2008). The *deservingness perceptions* framework (van Oorschot, 2000) translates welfare attitudes into more specific dimensions, revealing whether, on which grounds and to what extent one thinks welfare policies should target specific social groups—or *whether*, *why* and *how much* these groups *deserve* state-sponsored social assistance. This framework thus decomposes one's welfare attitudes into different levels of perceived deservingness, according to target social groups or to the reasons they should or should not be a target of welfare provision.

Deservingness perceptions studies typically target public opinion (see van Oorschot, 2000, 2008, 2010, also Heuer & Zimmermann, 2020; Nielsen et al., 2020). However, few empirical studies (Blomberg et al., 2017; Kallio & Kouvo, 2015) have focused on social-policy-operating *street-level bureaucrats* (cf. Lipsky, 2010), who—when provided with enough discretion—can shape social policy outcomes (Bovens & Zouridis, 2002; Breit et al., 2016; Rothstein, 1998); and none of them concentrated on the Latin American context. Our article expands the discussion on the deservingness perceptions of civil servants to a different political context and politico-administrative tradition—the Brazilian social security system.

The study is based on a survey of bureaucrats in the Brazilian National Social Security Agency (*Instituto Nacional do Seguro Social* [INSS]) and aims to understand the micro-level variables affecting deservingness standards across different contexts. The main research problem approached in this article is: *Which factors affect how INSS officials perceive the deservingness of social assistance-related beneficiaries?* We approach the problem by studying the connections from officials' *socioeconomic status*, *social work academic background* and *face-to-face client contact* to their deservingness perceptions. The deservingness perceptions are measured through seven criteria: *social investment*, *universalism*, *control* over need, *attitude*, *reciprocity*, *identity* and level of *need*. Relevant and significant relationships were found, which shed new light on the problems of street-level bureaucracy discretion, incite further research and inform policymakers, despite the limitations caused by low survey response rate and reduced sample representativeness.

The first paragraphs of the next section briefly describe the overall Brazilian context, the role of INSS as well as its street-level officials and, in its subsections, a brief review of the literature related to deservingness perceptions, its importance on street-level bureaucracy, and the hypotheses raised for the INSS officials' case. The following section details the research design and methods employed, including variable operationalisation. The subsequent section presents regression tables and states the findings. Finally, the discussion section elaborates on potential explanations for the findings, offers possible further research paths and benefits for practitioners, and describes the limitations of the study.

2 | THE BRAZILIAN CONTEXT AND PREVIOUS STUDIES

The findings on the causes of people's deservingness perceptions in previous studies are often presented as generalisable, though it is worth considering the particularities of the Brazilian context. Brazil's latest gross domestic

product (GDP) amounts to almost US$2 trillion, making the country the world's ninth largest, albeit ninth most unequal, economy (The World Bank, 2020). About 213 million people live in the country's 8.5 million km^2 territory (United Nations, 2020; Worldometers.info, 2021). The diverse economic situations and political trends in its 27 semi-autonomous federated states give rise to many regional discrepancies and development inequalities, or *different Brazils*, represented in the different profiles of its politico-administrative macroregions (Instituto Brasileiro de Geografia e Estatística (IBGE), 2019, 2020a; Santos & Silveira, 2001; Silveira, 2011).

Brazil is home to strong race-based identity segregation (de Souza, 2017; van Oorschot, 2008).[1] de Souza (2017) explained that this is represented by the upper classes' whitewashed contempt for what is called the *Brazilian riffraff* (*ralé Brasileira*)—the pool of atomised, marginalised, mostly Black and mixed-race people. Injustice is then deepened by informality, with more than 40% of the labour force being invisible to most contributory social policies and therefore relying on Brazilian selective, conditional social assistance (de Andrade, 2012, 2020b; Polonio, 2015).

Distributive social policies are therefore critical in Brazil. Since the late 1980s, democracy brought both universal policy undertakings and deep neoliberal reforms. Selectivity became present both through *hard* and *soft* instruments, while the demarcation between social assistance and insurance-based policies became blurry, as, for instance, both systems include means-testing mechanisms. The rural social security scheme and the fishermen closed season benefits are examples of this hybridity; they are formally insurance-based, but their granting does not necessarily depend on duly paid contributions (Caetano et al., 2015; Campos & Chaves, 2014; Schwarzer & Querino, 2002).

INSS plays an important role in this stage: the federal agency implements most Brazilian social security/assistance cash-based policies through its more than 1500 service offices spread over the Brazilian territory (CGU, 2021a; Brasil, 2020; de Andrade, 2020a; Ministério da Economia (ME), 2020). The management of the agency is fully centralised by the Federal government, and coordination with other governmental levels (municipalities or federated States) is limited to marginal and often contested local or regional cooperation agreements (as in Moreira, 2020). Yet, data from other organisations is often used in benefit granting through the means of registry interoperability, as in the case of information about family composition shared through the national registry on low-income assisted families, *CadÚnico*, which is maintained by municipal social services (see Cardoso, 2020).

Despite e-services and the automation of benefit granting (de Andrade, 2020b), most INSS operations rely on its 14,726 permanent (non-temporary) federal officials acting in service offices (INSS, 2020), the focus of the current study. This group comprises 61 different job titles (INSS, 2020), assigned according to the circumstances of the official's admission. Some officials were initially hired for specific activities, demanding specific job titles; sometimes job titles were changed in new civil servant contracting tenders, but those already holding positions inside INSS did not have their titles readapted. Besides, during the early 90s' administrative reforms, INSS incorporated officials from dismantled public agencies, who often maintained their original job titles, often unrelated in any sense to the agency activities.

INSS activities in service offices do not obey formal sectorial divisions.[2] So, regardless of job titles, officials working there likely perform INSS core activities, either in-person service provision or benefit application analysis/granting, and deal, in one way or the other, with all kinds of policy beneficiaries (Table 1). To illustrate, one official could either receive applications and provide orientations to clients physically at the service offices or analyse and decide on applications received both by the office or over the internet.

As Table 1 shows, despite the diversity, most of the workforce owns typical INSS job titles, straitly related to core activities. Amongst those, the Social Insurance Analyst job title (*Analistas do Seguro Social*, 21.6% of total officials) is higher-education based. Social Insurance Analysts can thus be specialised by formation and, despite this specialisation being not reflected in their official job title, formation-specific contracts demand that, besides regular INSS core activities, the official exert formation-specific activities. In this sense, the last INSS public tender hired Analysts with a specific formation on social work, who, according to the tender notice, would exert social work duties—*besides* other INSS core activities (Cespe/UNB, 2015).

Moreover, all INSS officials working in service offices can enjoy both a *soft* discretion space inherent to the provision of in-person services and a *hard* discretion space provided by benefit granting activities. While providing in-

TABLE 1 INSS service office officials' job titles and core activity participation (CGU, 2021b; INSS, 2020)

Job title type	Description	Job titles	Total in offices	In-person service[a]	Benefit granting[b]
Typical	Specific to INSS core activities	Social Insurance Technician	10,999	10,226 (93%)	7154 (65%)
Typical – higher education	Specific to INSS core activities	Social Insurance Analyst	2600	2368 (91%)	839 (32%)
Related	Can be related to INSS core activities	Administrative Agent, Assistance Program Agent, Information Analyst, Manager, Social Assistant, Auditor, Economist, and so forth	136	120 (88%)	19 (14%)
Unrelated	Unrelated or difficult to relate to INSS core activities	Bread Baker, Car Driver, Children Entertainer, Engineer, Security Agent, Typist, and so forth	991	877 (88%)	215 (21%)
Total			14,726	13,591 (92%)	8277 (56%)

[a]Number of officials providing in-person services at any time from 2017 to 2020.
[b]Number of officials granting benefits at any time in 2020.

person services, officials can modulate their interaction according to the perceptions they have on different client stereotypes (as in Lipsky, 2010). When acting on benefit granting, officials have the power to decide, based on policy regulations, whether benefits are granted or denied, or ask for more information or documents before deciding. In this research, we suppose that their attitudes, and thus their decisions, might be modulated according to how deserving they perceive the client to be (as assumed in Kallio & Kouvo, 2015; Blomberg et al., 2017).

2.1 | Deservingness perceptions: A CARIN model

Cash-based social policies are mostly delivered by grassroots-level civil servants working in INSS offices, who exercise their discretion based on documentation and their professional and individual attitudes. In this study, we are interested in the latter. The deservingness perceptions framework translates peoples' welfare attitudes into operational terms, quantifying their thoughts on how state-based assistance should be distributed, expressed through a set of five dimensions, often called by the CARIN acronym, standing for *control*, *attitude*, *reciprocity*, *identity and need* (As in Blomberg et al., 2017; Nielsen et al., 2020. See Figure 1). So, social groups deserve welfare support to the extent that they seem to (1) not be in *control* of their condition, (2) be effectively in *need*, (3) share *identity* with the observer(s), (4) have an adequate *attitude* and (5) have *reciprocated* society for the support. People's welfare attitudes towards a social group, translatable from the CARIN scores, tell which kind of selective social policies are legitimate and thus carried out successfully (Esping-Andersen, 1990; Rothstein, 1998; Svallfors, 2012; van Oorschot, 2000).

The *control* dimension plays a key role in most deservingness studies, in line with the strong Western belief in free will and meritocracy and with neoliberal reforms in the 1980s, which institutionalised the weighting of the level of *need* according to the *control* the needy have over their condition (Kangas, 2003; Larsen, 2008; Nielsen et al., 2020; van Oorschot, 2000).

The *identity* criterion is often connected with deservingness perceptions towards immigrants (Larsen, 2008; van Oorschot, 2000, 2008, 2010). Yet Blomberg et al. (2017) found higher identity-based deservingness perceptions towards social assistance beneficiaries amongst people who once *also* relied on social assistance.

Reciprocity assigns a material, insurance-like, compensation logic to deservingness perceptions, be it monetary or effort-based (Nielsen et al., 2020). Hence, the young are less deserving than the elderly, assuming that the latter

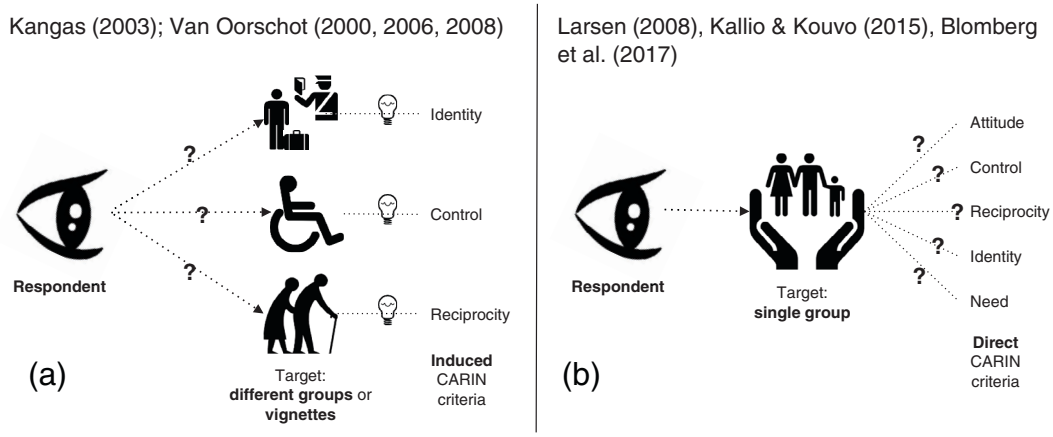

FIGURE 1 Approaches used in survey-based CARIN framework deservingness perceptions studies

have 'already contributed to society during their active years' (van Oorschot, 2000, p. 36). Often dropped out in empirical studies, the *attitude* criterion is a softer *reciprocity* dimension (Blomberg et al., 2017; Heuer & Zimmermann, 2020; Larsen, 2008; Nielsen et al., 2020). Docility, gratitude and generally desirable behaviour can be symbolic compensations for support.

The rationale for reciprocity-based deservingness can also be grounded in an *investment* approach, that is, spending on today's poor might return as future larger benefits to society. Heuer and Zimmermann (2020) proposed that expectation of reciprocation as a separate deservingness criterion, called 'social investment', highlighting the 'potentiality instead of conditionality of public support' (p. 399). Moreover, the deservingness framework assumes that people *have* welfare preferences towards different profiles. However, often no preferences are shown, suggesting the existence of overall '*universalists*', for whom deservingness heuristics tell little about their welfare attitudes (Blomberg et al., 2017; Kallio & Kouvo, 2015; Nielsen et al., 2020; van Oorschot, 2000). Following recent qualitative studies' suggestions (Heuer & Zimmermann, 2020; Nielsen et al., 2020), we consider the criteria of social investment and universalism in our models, forming the SU-CARIN acronym.

Previous deservingness survey studies used two general approaches (Figure 1). In the first (*a*) approach (Kangas, 2003; van Oorschot, 2000, 2008, 2010), deservingness perceptions are obtained from questions concerning solidarity towards different social groups or *vignettes* (small stories highlighting stereotypical character traits). Survey answers can be read as proxies for the respondents' perceptions under one or more criteria. For instance, if immigrants are understood to be entitled to a certain level of social provision, that level becomes the respondent's score under the *identity* criterion, assuming this as the prominent deservingness factor connected with the immigrant *label*.

In the second (*b*) approach (Blomberg et al., 2017; Kallio & Kouvo, 2015; Larsen, 2008), one group (the poor, the recipients of social assistance) is assessed by respondents through a set of statement-based questions corresponding to each deservingness criterion. When agreeing with a statement saying that the people in the assessed group are lazy, the respondent scores low under the *control* criterion.

Three arguments support the application of the second approach in our study. First, it addresses deservingness criteria directly (Kallio & Kouvo, 2015). Second, the indirect, different social groups/vignettes approach can conceal mixed deservingness criteria: immigrants can be seen as undeserving under identity *and* reciprocity, assuming they did not contribute enough to society yet to justify social protection (cf. Heuer & Zimmermann, 2020). Third, deservingness heuristics can conceal people's normative judgements of social groups (Nielsen et al., 2020). In the chosen approach, these group-related judgements likely affect all criteria in a constant or fuzzy way, avoiding specific criterion mismeasurements.

2.2 | Discretion and deservingness perceptions: The importance of street-level officials

Street-level bureaucrats deal directly with the public and often have enough discretion space to decide on its fate, shaping policy implementation (Bovens & Zouridis, 2002; Breit et al., 2016; Lipsky, 2010; Rothstein, 1998). Given the inexhaustible nature of public service demand, these agents often resort to *stereotype packaging* to match clients and categories of actions (Lipsky, 2010). This mechanism makes street-level bureaucrats' decisions especially prone to the influence of their deservingness perceptions (Blomberg et al., 2017; Bovens & Zouridis, 2002; Eiró, 2017; Kallio & Kouvo, 2015; Lipsky, 2010; Pires, 2017; Rice, 2013; Rothstein, 1998).

The gaps where social policy operators can incorporate their own distributive ideas form what Rothstein (1998) calls the 'black hole of democracy' because of the difficulty to gauge them and 'hold the administrators and officials who decide about the welfare of citizens in any way responsible for their actions' (p. 80). Despite the bleakness of the metaphor, these same gaps allow the flexibility needed for 'greasing the wheels' of implementation, or they even become key assets in the collaborative construction of service systems (Breit et al., 2016; Osborne & Strokosch, 2013; Pestoff et al., 2006; Virtanen et al., 2016).

Despite bureaucrats' behaviour being often tied to policy design, organisational culture and profession, it can also be prone to the same variables influencing the general public's welfare attitudes (Breit et al., 2016; Kallio & Kouvo, 2015; Rice, 2013). Following this thread, the present study addresses the micro-level institutional factors driving Brazilian INSS officials' deservingness perceptions. To the extent that bureaucrats' discretion raises policy selectivity, it reinforces the boundaries between *welfare state winners* and *losers* (those who pay little or no tax and receive targeted benefits and those who pay tax but do not receive any benefits). In the aggregate scenario, the odds of coalition formation amongst these groups are further weakened, spiralling up support for greater selectivity and thus even stronger boundaries (see Korpi, 1980; Larsen, 2008). Policy implementation is a venue for the reinforcement and stabilisation of inequality-stamped social relationships, and public agents might contribute to the consolidation of existing exclusion practices, regardless of formal policy goals (Pires, 2017).

Based on the discussion above, we have proposed three hypotheses concerning the connections between INSS officials' socioeconomic status, academic background and in-person service provision nature of their work and their deservingness perceptions.

2.3 | Hypotheses: Influence of micro-level factors on INSS officials' deservingness perceptions

Micro-level factors that drive even marginal changes in how INSS officials grant social benefits amounting to more than US$130 billion per year (ME, 2020) are in a pivot position in this system. Officials' social classes can be especially critical: welfare attitudes studies found less regard for state-backed cash transfer policies amongst higher classes (Pfeifer, 2009; Staerklé et al., 2012). However, van Oorschot's (2000, 2008, 2010) studies found no connection whatsoever between income and how deserving different groups are perceived to be. Yet, under Brazilian inequality, any effects related to socioeconomic status might be amplified and are therefore relevant. Thus, our first set of hypotheses is related to variations in officials' socioeconomic status:

H1. Officials' higher socioeconomic status is linked to

H1.1. Generally decreased deservingness perceptions across SU-CARIN criteria, especially under the control and reciprocity dimensions.

H1.2. No relevant shifts across SU-CARIN criteria.

Connections between higher education levels and increased deservingness perceptions are timid and often offset when controlled for self-declared ideology (Blomberg et al., 2017; Kallio & Kouvo, 2015; Roosma et al., 2014; van Oorschot, 2000, 2010). However, amongst bureaucrats, those with social work backgrounds saw higher deservingness in beneficiaries, as the formation assumes structural poverty causes, reducing the role of self-directed individual behaviour (Blomberg et al., 2017; Kallio & Kouvo, 2015; Sun, 2001; Weiss, 2003). This effect might not hold in the Brazilian scenario, where caritative mediation rules social assistance in general, downplaying poor people's reciprocity and assuming that they are guilty for their situation, uncompliant and often fraudulent (de Souza, 2009; Eiró, 2017; Koga, 2006). Therefore, both the more general perspectives on social work formation and those particular to Brazil are considered in the second hypothesis set:

H2. Officials' social work academic background is linked to

H2.1. Generally increased deservingness perceptions across all SU-CARIN criteria.

H2.2. Increased deservingness perceptions only under the identity and need criteria.

Close institutional pressures surrounding bureaucrats' daily activity shape their attitudes (Keiser, 2010; Lipsky, 2010). Living in the *institutional bubble* can make social security officials see less deservingness in social assistance beneficiaries, but this effect is attributed to less direct contact with the public (Blomberg et al., 2017; Kallio & Kouvo, 2015). Conversely, the relationships between bureaucrats and beneficiaries might be preserved when mediated by information systems (Ferreira & Medeiros, 2016), and even avoid stereotype packaging (Keiser, 2010). Our third hypothesis set addresses these questions:

H3. Officials' increased face-to-face client contact is linked to

H3.1. Generally increased deservingness perceptions across SU-CARIN criteria.

H3.2. No relevant shifts towards increased deservingness perceptions across SU-CARIN criteria.

Besides the variables involved in the hypotheses, bureaucrats' experience time in an INSS office is controlled to offset institutional bubble effects unrelated to face-to-face client contact. Age and gender are also used as controls, given their relevant impact on deservingness perceptions, but in different directions across diverse settings (Blomberg et al., 2017; Kallio & Kouvo, 2015; Kangas, 2003; Roosma et al., 2014; Staerklé et al., 2012; van Oorschot, 2000, 2010). To offset regional differences, the Brazilian macroregion in which the officials work is also controlled for.

3 | RESEARCH DESIGN AND METHODS

INSS activities in service offices are performed by 14,726 officials, largely concentrated in the Southeast and Northeast macroregions. Administrative data on them were obtained from the agency's website (INSS, 2020) and the open data portal *Fala.br* (Controladoria-Geral da União (CGU), 2021b).[3]

Electronic survey questionnaires were sent to a proportionally allocated stratified sample (Lohr, 2019) of 4419 officials, according to macroregions and effective participation in benefit granting decisions, separating those who decided on more than 10 benefit granting cases per month in 2020 from the others. Answers were collected between May 17, 2021, and June 2, 2021, and the response rate was rather low (15.34%), compromising the ability to generalise results. However, the effective sample size (678 responses, after excluding invalid entries) was

TABLE 2 Mann–Whitney *U* tests for the sample's pre-survey non-demographic variables

Null hypothesis	Population mean rank	Sample mean rank	Sig.
Same *face-to-face encounter time* distribution in the population and the sample	7712.03	7495.44	0.215
Same *casework in 2020* distribution in the population and the sample	7660.45	8615.86	0.000
Same *years in office* distribution in the population and the sample	7726.53	7180.59	0.002
Same *relative income* distribution in the population and the sample	7746.39	6749.32	0.000

satisfactorily large for the regression models developed. Data were anonymised before analysis. Further, the sample is biased, not reflecting macroregions' population proportions, χ^2 (4, $N = 678$) = 34.1337, $p < 0.001$, with the Northeast macroregion being underrepresented and the Southeast macroregion being overrepresented. Females are also slightly overrepresented, accounting for 55.6% of the sample ($p = 0.041$). Non-demographic variables' distributions fail representativeness in Mann–Whitney *U* tests, although the mean rank differences are modest (Table 2).

These divergences suggest a degree of selective non-response. Yet, most variables failing the tests are controlled for in the regression models, offsetting a relevant share of potential bias. Analyses are conducted through pairs of ordered logistic regression models (with and without controls) for each of the dependent variables, showing both if results hold regardless of controls or distortions due to overfitting.

3.1 | Dependent variables

The survey uses the single group approach to measure INSS officials' deservingness perceptions (cf. Kallio & Kouvo, 2015). The statements below are read by the respondents and assessed through a five-point Likert scale anchored from 'strongly disagree' to 'strongly agree':

- *Social Investment*: Most of those who receive benefits of social assistance nature will retribute them to society at some point, either through taxes or work efforts, paid or not.
- *Universalism*: Benefits of social assistance nature should be paid regardless of their recipients' contributions to society, background or causes of their situation.
- *Control* (over neediness): Most of those who receive benefits of social assistance nature is to blame for their economic situation.[4]
- *Attitude*: Most of those who receive benefits of social assistance nature do behave and show gratefulness or respect towards society.
- *Reciprocity*: Most of those who receive benefits of social assistance nature have significantly contributed to society before, either through taxes or work efforts, paid or not.
- *Identity*: The recipient of benefits of social assistance nature can be any one of us whose economic situation has unexpectedly weakened.
- *Need* (level of): Despite the causes of their situation, most of those who receive benefits of social assistance nature is really in need of them.

As the objective of the study is to assess INSS officials' perceptions towards recipients of social assistance cash benefits in general, we use the expression 'benefits of social assistance nature', to include any benefits bearing some degree of social assistance under the officials' own ideas, to account for the abovementioned often blurry boundaries

between social assistance and insurance-based benefit schemes. This concept was developed after a two-round validation/pilot stage of the survey, in which officials were asked to comment on the questions, propose changes or corrections and give their interpretation of the survey's objective. Thus, the final version of the survey questionnaire contained an explanation of the expression 'benefits of social assistance nature', with common examples given by the officials themselves. It was included in the heading for the section in which respondents should assess deservingness-related statements, the exact wording as follows:

> Tell to which degree you agree or disagree with the following statements (...):
> For the purposes of this research, benefits of social assistance nature can be understood as those operated or not by INSS, and even those that, although technically contribution-based, you understand to have social assistance character—for instance, rural social security benefits, Bolsa-família, fishermen closed season benefit or continuous cash benefits.

3.2 | Independent variables

To test the first hypothesis set (H1.1 and H1.2), officials' *socioeconomic status* is measured through a *self-socioeconomic assessment* based on Kangas' (2003) instrument. The wording is as follows: '*In our society, some groups are seen as being of a higher socioeconomic status and some as being of a lower status. Where do you think you fit into this scale (10-point scale)?*'

H2.1 and H2.2 are assessed through a simple survey question, asking the respondents to select their formation area from a list (under which *social work formation* is the considered factor). H3.1 and H3.2 are assessed through administrative data on *face-to-face encounter time* with the public from 2017 to 2020, measured in hours, extracted from INSS service provision systems (CGU, 2021b).

3.3 | Control variables

Officials' *age*, *gender*, *education level*, total *years in office* and their workplaces' *macroregion* (Instituto Brasileiro de Geografia e Estatística (IBGE), 2019) are controlled for in the regression analyses. Regarding age, gender and education, data were gathered through survey questions. Years in office and workplaces' macroregions were extracted from administrative data (INSS, 2020).

4 | FINDINGS

Our analyses suggest that micro-level factors play important roles in social policy operators' deservingness perceptions, piercing bureaucracy's institutional bubble. Officials whose self-assessed socioeconomic status falls in the middle see social assistance beneficiaries as less deserving under different deservingness criteria, while officials in a higher social class more often recognise their needs as legitimate. Social work formation indisputably predicted higher deservingness perceptions across all SU-CARIN criteria, in line with earlier survey studies' findings (Blomberg et al., 2017; Kallio & Kouvo, 2015). Excessive face-to-face encounter time was found to increase the odds that social assistance beneficiaries are seen as to blame for their condition.

Table 3 presents the two models for each criterion, one including only the variables of interest (*Models 1*) and another including control variables (*Models 2*).[5] Basic assumptions for ordinal regressions were met,[6] and the models showed significant fitting, except for *universalism* ($p = 0.29/0.19$, Nagelkerke $R^2 = 0.01/0.03$).

TABLE 3 SU-CARIN criteria ordered logistic regressions report (odds ratio; standard errors [SE] for models 2)

	Social investment			Universalism			Control			Attitude			Reciprocity			Identity			Need		
	1	2	SE	1	2	SE	1	2	SE	1	2	SE	1	2	SE	1	2	SE	1	2	SE
Social work (ref. other)	9.59***	10.06***	2.88	1.71*	2.07**	0.52	8.72***	8.00***	2.95	2.22**	2.55***	0.67	7.27***	7.90***	2.20	2.65***	2.53***	0.67	3.36***	3.88***	1.04
Face-to-face time (ref. ≤96 h)																					
97–1000	1.15	1.08	0.25	0.83	0.81	0.18	0.72	0.70	0.18	0.80	0.78	0.18	1.03	1.03	0.23	1.23	1.21	0.28	0.77	0.76	0.18
1001+	1.11	1.11	0.26	0.85	0.84	0.19	0.55*	0.56*	0.14	1.03	1.06	0.25	0.93	0.99	0.23	1.28	1.26	0.30	0.72	0.75	0.18
Self-assessed socioeconomic status (ref. ≤5)																					
6–7	0.73*	0.72*	0.11	1.04	1.04	0.15	0.73*	0.73*	0.11	1.12	1.12	0.17	0.65**	0.64**	0.10	0.85	0.85	0.13	1.20	1.17	0.18
8+	0.68	0.76	0.19	0.94	0.98	0.23	0.87	0.22	0.71	1.12	1.17	0.29	0.84	0.92	0.22	0.63*	0.67	0.16	1.53	1.71*	0.42
Age (ref. ≤39)																					
40–51		1.35	0.26		1.57*	0.30		1.29	0.26		1.10	0.21		0.97	0.18		1.05	0.20		1.10	0.22
52+		1.55*	0.32		1.37	0.27		1.31	0.28		0.95	0.20		0.99	0.20		1.16	0.23		0.97	0.20
Female (ref. male)		0.80	0.12		0.74*	0.11		0.87	0.13		0.93	0.14		0.85	0.12		1.03	0.15		0.68*	0.10
Education level (ref. basic)																					
College		0.99	0.23		1.16	0.25		1.02	0.24		1.20	0.28		0.89	0.20		1.03	0.23		1.11	0.26
Post-college		1.34	0.33		1.17	0.27		1.57	0.40		1.09	0.27		1.08	0.27		1.06	0.25		1.27	0.31
Years in office (ref. ≤10)																					
11–16		1.22	0.21		1.14	0.19		1.05	0.19		1.04	0.18		1.31	0.22		0.97	0.16		1.30	0.23
17+		1.11	0.24		1.33	0.29		0.86	0.20		1.35	0.30		1.34	0.29		0.83	0.18		1.31	0.30
Macroregion (ref. = southeast)																					
North		0.82	0.29		0.64	0.23		1.78	0.72			0.73	0.25	0.87	0.32		0.85	0.28		1.10	0.38
Northeast		1.59*	0.30		0.87	0.16		1.37	0.28			1.66**	0.32	1.72**	0.33		1.19	0.23		1.64*	0.33

TABLE 3 (Continued)

	Social investment			Universalism			Control			Attitude			Reciprocity			Identity			Need		
	1	2	SE	1	2	SE	1	2	SE	1	2	SE	1	2	SE	1	2	SE	1	2	SE
South		0.91	0.17		0.83	0.15		0.66*	0.13			1.02	0.19	0.87	0.16		1.01	0.18		0.89	0.17
Centre-west		0.88	0.25		0.68	0.18		0.71	0.21			0.96	0.28	1.43	0.43		1.00	0.30		0.97	0.28
Model																	0.00				
Model fit sig.†	0.00	0.00		0.29	0.19		0.00	0.00		0.01	0.02		0.00	0.00		0.87	0.03		0.00	0.00	
χ^2 Pearson sig.	0.03	0.04		0.32	0.43		0.06	0.02		0.17	0.25		0.12	0.01		0.74	0.34		0.81	0.48	
χ^2 deviance sig.	0.13	1.00		0.14	1.00		0.08	1.00		0.19	1.00		0.16	1.00		0.01	1.00		0.75	1.00	
Parallel lines sig.	0.01	0.00		0.42	0.00		0.00	0.00		0.55	0.01		0.11	0.08		0.56	0.04		0.87	0.03	
Nagelkerke R^2	0.12	0.16		0.01	0.03		0.09	0.14		0.02	0.04		0.10	0.13			0.04		0.04	0.07	

***$p < 0.001$. **$p < 0.01$. *$p < 0.05$. †Chi-Square-2 Log-likelihood difference from intercept-only model.

TABLE 4 Results

Hypothesis	Acceptance	Finding
Officials' higher socioeconomic status is linked to		
H1.1. Generally decreased deservingness perceptions across SU-CARIN criteria, especially under the control and reciprocity dimensions	Rejected	Higher socioeconomic status is not linked to lower SU-CARIN
H1.2. No relevant shifts across SU-CARIN criteria	Partially accepted	Mid-rank self-assessed socioeconomic status is linked to lower S, C and R; a high rank is linked to a higher N
Officials' social work academic background is linked to		
H2.1. Generally increased deservingness perceptions across all SU-CARIN criteria	Accepted	Social work formation is linked to higher SU-CARIN
H2.2. Increased deservingness perceptions only under the identity and need criteria	Rejected	
Officials' increased face-to-face client contact is linked to		
H3.1. Generally increased deservingness perceptions across SU-CARIN criteria	Rejected	Increased face-to-face client contact is not linked to higher SU-CARIN
H3.2. No relevant shifts towards increased deservingness perceptions across SU-CARIN criteria	Partially accepted	High levels of face-to-face client contact are linked to lower C

Concerning the first hypothesis, mid-score *self-assessed socioeconomic status* showed significant negative effects on the S, C and R dimensions ($p < 0.05$, <0.05, and <0.01, respectively), being linked to an average reduction of 36%–27% in the odds of improving one point in the deservingness scores. Furthermore, officials recognising their upper socioeconomic status show a significant increase in the odds of incrementing the *need* deservingness score (71%, $p < 0.05$).

The results reject *H1.1*, as no reduction in any criteria can be attributed to a higher socioeconomic status, contrary to the findings of Pfeifer (2009) and Staerklé et al. (2012). *H1.2* is only partially rejected, as *self-assessed socioeconomic status* showed significant impacts on S, C, R, and N. Therefore, van Oorschot's (2000, 2008, 2010) findings on socioeconomic status hold for INSS officials at least under U, A and I.

Regarding the second hypothesis set, the results confirm *H2.1* and reject *H2.2*; social work formation is significantly related to a *two- to tenfold increase* in the odds of incrementing every *SU-CARIN* score ($p < 0.001$ for S, C, A, R, I, and N; $p < 0.01$ for U).[7] This is in line with previous survey findings (Blomberg et al., 2017; Kallio & Kouvo, 2015) and the idea that the social worker mindset assumes structural poverty causes (Sun, 2001; Weiss, 2003). *H2.2* is rejected, as social work formation is connected with relatively lower I and N scores than those for S, C and R, contradicting expectations based on Brazilian studies (de Souza, 2009; cf. Eiró, 2017; Koga, 2006).

For the third hypothesis set, officials most often working in the counter had reduced C scores. More than 1000 h of face-to-face contact from 2017 to 2020 made officials, on average, 44% less likely to get one more point than officials not usually facing INSS clientele ($p < 0.05$). Therefore, *H3.1* does not hold, contradicting previous findings (cf. Blomberg et al., 2017; Kallio & Kouvo, 2015). The results partially confirm *H3.2*, as, in most models, the null hypothesis is not rejected, supporting arguments on the preservation of client contact in system-mediated interactions (cf. Ferreira & Medeiros, 2016; Keiser, 2010). Table 4 and the diagram in Figure 2 summarise the results.

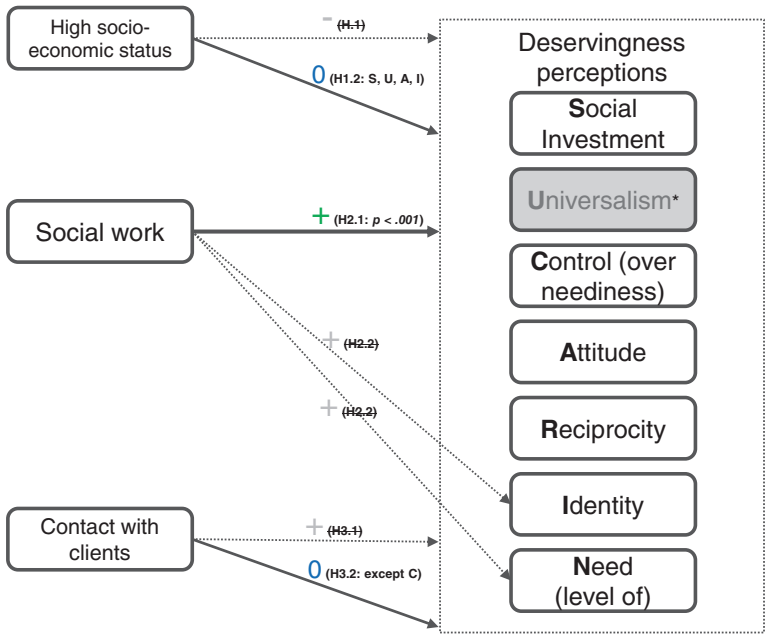

FIGURE 2 Results diagram; *Models for the universalism criterion were not significant [Colour figure can be viewed at wileyonlinelibrary.com]

5 | DISCUSSION

Our results show that the assessed variables are relevant to Brazilian INSS officials' deservingness perceptions, although some are trickier than previously assumed. First, concerning *socioeconomic status*, findings contradicted our first expectations, as, when self-assessing their position on the socioeconomic ladder, officials in the middle steps perceived less deservingness under the *social investment*, *control* and *reciprocity* dimensions, whereas those in the upper steps more often perceived beneficiaries' *needs* as legitimate. Yet, this finding is in line with Heuer and Zimmermann (2020), where middle-class focus group participants assessed deservingness mostly under *reciprocity* and *control* criteria.

Korpi's (1980) *welfare backlash* theory can also help to explain stricter middle-class deservingness perceptions towards the socially assisted. While carrying the heavier tax burden, middle-classes do not benefit from selective, means-tested social policies (such as the social assistance-related ones referred to in this study's survey)—and thus are unlikely to support them. This effect might also strengthen the idea of social assistance as a non-subjective right (thus non-universal, cf. Bobbio, 2017), therefore faced as state-proxied charity, targeting the poor regardless of their perceived deservingness—ultimately reinforcing stigmatisation (Pinzani & Rego, 2019; Rainwater, 1982). Yet, these effects might be offset from the well-off officials' standpoint, as they do not compete for public resources in any sense with social assistance recipients (as in *Theory of Competition*, cf. Maassen & de Goede, 1991), while the benefit values are just too small (what might signal legitimate *needs*, as the results also did show). Nevertheless, the finding calls for further in-depth exploration into the mechanisms connecting officials' socioeconomic status and their deservingness perceptions.

Second, *social work academic background* strongly increased deservingness perceptions under all criteria, confirming previous findings (cf. Blomberg et al., 2017; Kallio & Kouvo, 2015) while dissonating from social workers' wary/charity-based behaviour towards the assisted, as found in Brazilian studies (de Souza, 2009; Eiró, 2017;

Koga, 2006). However, these studies did not compare social workers with other categories but to an ideal egalitarian attitude, and so did not rule out that a social work background could still increase deservingness perceptions compared with other backgrounds in Brazil.

Third, excessive *face-to-face client contact* did not confirm the predicted link to higher deservingness perceptions, but a rather unexpected link to lower *control*-based deservingness standards. A possible explanation could relate to an increase in the odds of officials prone to excessive client contact witnessing more undeserving stereotypes or more cases of fraud attempts, which could be more memorable than the regular social assistance beneficiary. Besides, the finding could be also connected with a *stress* effect: officials dealing the most with the public might get overburdened by strggwith an endless stream of clients, becoming indifferent to or blaming them for their needs (an explanation connected with the *inexhaustible demand* public service problem—see Lipsky, 2010). So, this effect might not be connected with in-person service provision per se (where the opposite is expected, that is, personal contact would drive more empathy), but to the setting in which it occurs: offices not disposing of enough resources to properly face the demand. Yet, none of these tentative explanations addresses the fact that only the *control* dimension was affected (although it has a rather central role in deservingness heuristics, see Kangas, 2003; Nielsen et al., 2020). Qualitative research could address the explanatory factors lying between this particular dimension and in-person service provision in more detail.

Additionally, the variables' influence on *universalism* was non-significant. However, this criterion gauged the respondents' position in a selectivity–universality ideas scale, not a traditional deservingness dimension. The results thus expose how universalistic logics are *disconnected from* those embedded in deservingness perception heuristics (cf. Nielsen et al., 2020).

The overall results strengthen the challenge to the idea that a public agency's institutions hermetically lock bureaucrats' behaviour from outer pressures (Lipsky, 2010; cf. Rice, 2013). This is because, different from previous studies (cf. Blomberg et al., 2017; Kallio & Kouvo, 2015), all the surveyed officials inhabit the same basic institutional environment (INSS), and the findings hold regardless of their immersion time in it (as the models control for their total *years in office*). Conversely, apart from significant effects linked to the South and especially to the Northeast macroregions, deservingness perception variations are rather territorially homogeneous for most officials—despite their important socioeconomic differences. This signals that the INSS institutional environment might drive *some* perception uniformity—though the truth of this statement requires comparison with the Brazilian general public's deservingness perceptions.

6 | CONCLUSION

This study participates in the discussion on the importance of micro-level administrative practices, namely, discretion, in administration. The findings show that the deservingness perceptions of street-level social policy operators are significantly affected by their socioeconomic status, formation area and face-to-face contact with clients in the Brazilian INSS context. Socioeconomic status does not affect the *attitude* and *identity dimensions*, but a middle-class status drives lesser deservingness perceptions under *social investment*, *control*, and *reciprocity*, while well-off officials are more likely to recognise the *needs* of the socially assisted as legitimate. Social work formation shows a strong positive influence under all deservingness perceptions criteria. Although not showing significant effects in most models, excessive face-to-face contact was connected with lesser deservingness perceptions under the *control* criterion. The low survey response rate might prevent one from generalising the study results, however, the significance of the relationships found lays a reliable ground for further studies. Overall, the idea that the bureaucracy bubble is not this hermetic is reinforced, with *outside* institutions having significant influence on bureaucrats' behaviour, as suggested by Rice (2013).

Aware of these influences, Brazilian policymakers could plan social policy operators' decision spaces so as to help keep policy goals on track—procedures can be reformed to avoid distortions, while discretion can be channelled

to activities where extended flexibility might improve effectiveness. Agencies can also minimise benefit granting bias by considering the findings when recruiting and developing officials to work in these activities. Besides, automation and algorithm-based policies still depend on *system-level* bureaucrats (Bovens & Zouridis, 2002), the human wizards pulling the levers, who *also* resort to stereotyping and other simplified heuristics in their decisions. While street-level discretion can have an impact on a one-to-one case basis, *street-level algorithms* (Ammitzbøll Flügge et al., 2021) amplify system-level bureaucracy decisions and make rollbacks more difficult (Cardoso, 2020). Harmful effects caused by automation also become more challenging to buffer at the street level, with frontline discretion being swept under the carpet as an undesirable residue. However, unforsaken street-level discretion spaces can be *designed* to better integrate man and machine. Micro-level variables predicting how discretion is used, like those analysed in this paper, are critical in this endeavour.

Future research could thus target system-level bureaucrats and deservingness perceptions' fingerprints in street-level algorithms. Furthermore, connections between deservingness perceptions and actual bureaucrat decision-making in social policies still lack empirical evidence. Finally, the deservingness criteria framework can be further improved by, for instance, theorising and assessing relationships between traditional deservingness scores and universalism.

7 | LIMITATIONS

First, we offset part of the omitted variables by controlling the models by macroregions, while we disregard other parameters, such as local-level economic traits. Anyway, as in other quantitative social sciences studies, models *are* expected to explain only small—though significant—parts of the effects. Second, the results should not be used to compare INSS officials' deservingness perceptions to any given standards or other agency officials' perceptions, given the sample's selection bias; it is legitimate, though, to compare the links we found with those in other settings under similar parameters. Third, the *face-to-face contact* variable aggregates all sorts of different services provided by the official under one single, hour-based, dimension; if social assistance-related services take more time than other services, the data could hide a relevant qualitative separation. Service/time ratios could be determinant too, as a single 1-h encounter is different from six 10-min ones, with these being likely pruned of empathy and solidarity. Much complexity is concealed in this unidimensional measure, which deserves to be further studied. Finally, we reinforce that the low survey response rate hinders the study's generalisability, despite the significant relationships found.

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CONFLICT OF INTEREST

The authors declare no potential conflict of interest.

DATA AVAILABILITY STATEMENT

The administrative data that support the findings of this study are available on the following Brazilian government repositories: Fala.br website, at https://falabr.cgu.gov.br/, petitions 03005.178904/2020-40; 03005.019053/2021-85; 03005.216980/2020-61; 03005.019818/2021-87; 03005.049882/2021-92; and INSS website, at https://www.gov.br/inss/pt-br/acesso-a-informacao/servidores. Anonymous survey data can be made available by the corresponding author upon reasonable request.

ETHICS STATEMENT

Informed consent was observed for the participation in the study's survey. No identifiable data were made available, and research subjects' anonymity was maintained. Bias-free language was applied to the largest extent possible,

however, the terms *poor* and *needy* were used in order to keep the concepts in line with previous studies on the same theme, particularly the ones of deservingness perceptions and welfare attitudes.

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ENDNOTES

[1] Most Europeans reaching Brazil during the last migration waves were received more favourably than the existing Black population and often had improved access to semi-specialised workforce positions (de Souza, 2017).

[2] Offices' premises often comprise a space reserved for medical experts' activities, which usually involve the assessment of client conditions to determine if they have the right to sickness or disability-based benefits. However, these medical experts are not a part of INSS workforce since 2019. Currently, despite being involved in the agency's activities, they report to the Ministry of Economy—and are not the object of this study (see Brasil, 2019).

[3] Petitions 03005.178904/2020-40; 03005.019053/2021-85; 03005.216980/2020-61; 03005.019818/2021-87; 03005.049882/2021-92.

[4] Scores under the control dimension were inverted after data collection, given the opposite direction of the statement.

[5] Models ran in IBM SPSS Statistics version 28. Standard errors obtained through StataCorp Stata 17 MP.

[6] Most models did not satisfy parallel lines tests, violating, a priori, the proportional odds assumption (homogeneous Odds Ratio coefficients for each independent variable between different dependent variables levels). There are arguments for sticking with the models in any case, as the parallel lines test is anti-conservative and 'nearly always results in [the] rejection of the proportional odds assumption' (Azen & Walker, 2021; Heeringa et al., 2010; National Centre for Research Methods [NCRM], 2011, p. 17).

[7] In opposition to other formation backgrounds in general. None of the other formation backgrounds showed significant links with the dependent variables.

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