

THE ‘TWO LIVES’ OF ESPING-ANDERSEN AND THE REVIVAL OF A RESEARCH PROGRAMME: GENDER EQUALITY, EMPLOYMENT AND REDISTRIBUTION IN CONTEMPORARY SOCIAL POLICY

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ABSTRACT

This article makes two conceptual contributions to social policy literature. First, we summarise key concepts and insights from Gøsta Esping-Andersen’s major books, tracing his work in ‘two lives’: ‘the foundations, or the welfare state between states and markets’ and ‘the demographic turn’. Analysing the ‘first life’, we revisit the centrality of the decommodification and social stratification concepts and the seeds of the social investment approach. Further, we explore Esping-Andersen’s masterful analysis of the double bind of the welfare state (supporting full-employment and redistributive harmony) in a post-industrial era and how countries belonging to different regimes have dealt with it. Through his ‘second life’, we explore the ‘impossible marriage’ between full employment and equality, and the development of the social investment approach. Our second contribution is to critically analyse a tension – generated by the shift from a broad to a narrow social policy perspective – between the two lives and how it raises questions for contemporary social policy. We suggest the field should take stock of Esping-Andersen’s work holistically, going beyond a simplistic use of welfare regime typologies and the universal proposition of a Scandinavian-style social investment approach. This approach tends to overlook factors related to the international context (e.g. the expansion of the market logic, and questions of exchange, inflation, and debt) when assessing the impact of social policy on key outcomes. Our ultimate goal is to revive a research programme based on the integration between social policy and international political economy, a programme geared at critically assessing issues related to gender equality, employment and redistribution.

1. INTRODUCTION

“The world is so forgetful that it even fails to notice the absence of what has been forgotten.”
(*The Year of the Death of Ricardo Reis*, José Saramago 1991)

We provide a critical reading of Esping-Andersen’s *corpus*. This affords us an opportunity to reflect on the stance the welfare state assumes between states, markets and demographic changes in a post-industrial era. Our ultimate goal is to revive a research programme based on the tension emerging from this critical reading and the integration between social policy and international political economy. This integration should help to consider factors related to the international context alongside the characteristics of national welfare states in the assessment of key social policy outcomes like gender equality, employment levels and redistribution. Highly relevant factors are the evolution of monetary and productive systems, the expansion of the market logic, the role of austerity in curtailing demand, the position of countries within international political economy, and questions of exchange, inflation and debt. Extending Hay and Marsh’s (1999: 14) considerations to social policy, we suggest that scholars concerned with domestic social, political and economic dynamics should account for the international conditions of such dynamics (see also the debate on ‘methodological nationalism’, Chernilo 2011).

Investigating Esping-Andersen’s *corpus* is like analysing the relationship we have with our parents. It is a psychoanalytic session that can help us target blind spots in contemporary social policy. Rediscovering his work is like Ricardo Reis’ encounter with Pessoa at night – a quest for identity and understanding that explains the urge to write this article. Esping-Andersen’s work is integral to the evolution of social policy as a field of study. His ‘sociological imagination’ is grounded in the key social policy debates of the last decades: the research of the causes of welfare state development, the complex link between the welfare state and employment, and the influence of the welfare state on family structures and gender equality. But his work is also a lodestar of a rapidly expanding field of study; it helped to determine its maturation for four decades, and his books are ‘classics’¹ in social policy (Table 1 displays the citation count of Esping-Andersen’s main books). The centrality of his work makes our critical revisitation of his corpus a fruitful starting point to think broadly about social policy as a discipline and to indicate future research avenues.

Table 1. Main Esping-Andersen’s Work and Citation Count (English editions only)

Books	Year of Publication	Citations
<i>The Three Worlds of Welfare Capitalism</i>	1990	46647
<i>Social Foundations of Postindustrial economies</i>	1999	11994
<i>Welfare States in Transition: National adaptations in global economies</i>	1996	4429
<i>Why We Need a Welfare State</i>	2002	4063
<i>Politics Against Markets: The social democratic road to power</i>	1985	3352
<i>The Incomplete Revolution: Adapting welfare states to women's new roles</i>	2009	2559
<i>Changing Classes: Stratification and Mobility in Post-Industrial Societies</i>	1993	972
<i>Why Deregulate Labour Markets?</i>	2000	840

Source: Google Scholar (extracted on the 2nd of November 2023).

¹ See Emmenegger et al. (2015).

We make two conceptual contributions to social policy literature. First, we provide a summary of key concepts and insights contained in Esping-Andersen's *corpus*. We trace his work in two phases: 'the foundations, or the welfare state between state and markets' and 'the demographic turn'. Looking at his 'first life' – with insights from *Politics against Markets* and *The Three Worlds of Welfare Capitalism* – we revisit the centrality of the decommodification and social stratification concepts and the seeds of the social investment approach. Moreover, his Kaleckian reading of the relationship between the welfare state, employment and redistribution allowed Esping-Andersen to offer an innovative analysis of welfare state developments in a post-industrial era. Exploring his 'second life' – with insights from *Social Foundations of Postindustrial Economies*, *Why We Need a Welfare State*, and *The Incomplete Revolution* – we focus on the 'impossible marriage' between full employment and equality, and the development of the social investment approach (an approach that Esping-Andersen reframed in the early 2000s).

Second, we highlight a tension – generated by the shift from a broad to a narrow social policy perspective – between the two lives, and how it raises important questions for contemporary social policy, especially with regards to gender equality, employment and redistribution. A central tenet of *The Three Worlds of Welfare Capitalism* is that in the passage from Fordism to a service-based economy, the double bind of the welfare state has become barely manageable. Esping-Andersen defined this double bind as the task of simultaneously supporting full-employment and redistributional harmony. The elaboration of his taxonomy served primarily to select a representative country for each regime to investigate three prototypical trajectories of welfare state change, which influenced how countries deal with the double bind in a post-industrial era (Esping-Andersen 1990, chapter 7).

He argued that during Fordism, states could manage the double bind, mostly through an interventionist industrial policy and the partial control of the investment function. In the post-industrial era (Bell 1973) the task became heavier: western countries faced a decline of profitability² and had to compensate for the lack of endogenous growth with other strategies (Baccaro and Pontusson 2016, Baccaro et al. 2022). The welfare state has therefore been increasingly used to avoid social conflicts through a 'deferred wage' approach, that is a reduction of present consumption for citizens in exchange for a later expansion of social rights (e.g. generous defined benefits pensions) (Esping-Andersen 1990, chapter 7). However, this approach weakened welfare state fiscal sustainability in a period of stagnation (although to different degrees across countries³).

Esping-Andersen's thought evolved in his second life. He proposed to rescue the welfare state from the double bind through the growth of female employment. He argued that the welfare state – following the model of Scandinavian countries – must support this growth with lower class women taking on a role similar to middle upper class women, especially in the Mediterranean. A new social investment strategy was called for, and it differed substantially from that elaborated in *Politics against Markets* in that it did not require state control of the investment function. However, we argue that a successful social investment strategy is hard to implement in a context of 'permanent austerity' (Pierson 2001). Boosting female employment in nations where wages are stagnant and compensatory policies weak, e.g. Mediterranean countries, might even contribute to further inequality (Ferragina 2019, 2022). Persistent differences in wages and labour market participation among lower and middle upper class women and across countries are connected also to the double bind of the welfare state

² "The rate of profit is the indicator of the profitability of capital. It relates the mass of profits realized during a given period, one year, to the total sum of funds invested" (Dumenil & Levy 2004: 22).

³ In accordance to their welfare regime, their position in the international political economy context and the performance of their growth model.

and the international political economy context, and will go uncontested if labour is weak *vis-à-vis* capital.

At the analytical level, we suggest that the progression from the first to the second life sees Esping-Andersen change from a broad to a narrow social policy perspective. The broad perspective is based on the integration between social policy and international political economy, while the narrow view investigates social policy as the domain of social amelioration (Esping-Andersen 1990: 1-2). The shift from a broad to a narrow perspective does not only concern Esping-Andersen but has been paradigmatic in social policy. Most contemporary social policy studies investigate the welfare state as a series of policy measures that are timely solutions to pressing issues, and often consider the welfare state as ‘politics for the markets’ embedded within independent and isolated nation states. The predominance of this narrow perspective supported research in new domains and put the spotlight on topics previously disregarded. It also helped the formulation of concrete policy measures, and in some cases closed the gap between academic studies and policy practice. However, it also had conceptual costs and caused significant blind spots. Several factors related to the international political economy context that condition domestic social policy and its outcomes have been disregarded.

In a context marked by growing inequalities, it is important to revive a research programme grounded in a theoretically broad social policy perspective able to connect demographic concerns with the international political economy context. Contemporary social policy studies – like the second Esping-Andersen of the demographic turn – cannot get away from the first Esping-Andersen. A critical reading of Esping-Andersen’s *corpus* suggests that the relationship between states and markets in an international setting is crucial to understand issues related to gender equality, employment and redistribution even when the household economy is brought back in. The remainder of the paper is as follows. We first document the main insights of Esping-Andersen’s work, encompassing both his first and second life. Then, we elaborate the blind spots emerging from the analysis of the two lives, and from these we propose a renewed research programme for social policy.

2. THE TWO LIVES OF GÖSTA ESPING-ANDERSEN

We define the first life of Esping-Andersen (1985, 1990) – ‘the foundations, or the welfare state between states and markets’ – as the period of his scholarship characterised by *Politics against Markets* and *The Three Worlds of Welfare Capitalism*. These works were published at a time when social policy scholars were attempting to explain welfare state development and its drivers (for a review, Skocpol and Amenta 1986; Quadagno 1987). Esping-Andersen took part in this debate by first illustrating the path of Scandinavian social democracy and positioning himself within the power resources tradition (Korpi 1978, 1983, Stephens 1979, Himmelstrand et al. 1981, Shalev 1983, Esping-Andersen 1985). He then developed an overarching contribution to comparative social policy by investigating the origins and development of different welfare regimes across OECD countries (Esping-Andersen 1990).

The Three Worlds of Welfare Capitalism, his most cited book (Table 1), is also a hinge to Esping-Andersen’s second life. We define this as ‘the demographic turn’. The first part of the book deals with the classification of welfare regimes and is anchored to the political economy developed in *Politics against Markets*. The second part employs welfare regime typologies to select three country-trajectories of post-industrial welfare state change related to employment (Sweden, Germany and the US). In line with his second life, the book’s conclusion focuses on these trajectories and not on his famous typology (Esping-Andersen 1990: 229).

The transition from the first to the second life effectively took place between ‘the old world’ of his formative years and the publication of *Changing Classes* and ‘the brave new world’ mapped out in *Welfare States in Transition* (Esping-Andersen 1993, 1996). The second life is characterised by the analysis of welfare state transformations in the *Social Foundations*

of *Postindustrial Economies*⁴ (Esping-Andersen 1999) and the proposal to defend the welfare state in hard times in *Why We Need a Welfare State* (Esping-Andersen et al. 2002). A key feature of this phase is the focus on family dynamics and children, as illustrated in *The Incomplete Revolution* and *Families in the 21st Century* (Esping-Andersen 2009, 2016, see also Esping-Andersen and Billari 2015).

The relation between the first and the second life is complex and raises questions for social policy scholarship. Esping-Andersen paved the way for a renewal of the field; the conclusions drawn in his second life have an important influence on contemporary social policy debates. Analyses of the welfare state grounded in the study of demography and family dynamics took prominence over the study of the relations between states and markets in an international setting. This development is due to the shortcomings of Esping-Andersen's early work and power resources scholarship in general,⁵ its failure to address gender and family dynamics, and to an epochal shift in international political economy and ideology (Jessop 1993, Harvey 2005, Mirowski and Plehwe 2009, Ferragina et al. 2022). Therefore, we suggest that a critical reading of the entirety of Esping-Andersen's work helps to re-embed current social policy issues within international political economy. This is key to investigate the influence of the welfare state on gender equality, employment and redistribution in the age of 'permanent austerity'.

2.1. The Foundations, or the Welfare State between State and Markets

Esping-Andersen (1985) suggested that the strength of social democratic power in Denmark, Norway and Sweden was related to Social Democratic parties' capacity to build alliances with different parties and classes. This power was rooted in an innovative reform strategy grounded in the principle of universal decommodification. Following Barrington Moore (1966), Esping-Andersen argued that the 'unique' political realignment between farmers and the working class before WWII and the disunity of the bourgeoisie (Castles 1978) were key elements to explain the long Social Democratic hegemony in Scandinavia. Against this backdrop, he systematically explained welfare state varieties across developed countries: "the history of political class coalition is the most decisive cause of welfare state-variation" (Esping-Andersen 1990: 1). Whether or not one agrees with this historical argument is not the point, for it assumed a pivotal importance in the literature. Many works on the politics of social policy consider cross-class and cross-party alliances as the basis of welfare state structure and change (e.g. Gingrich and Häusermann 2015, Thelen 2014).

The analysis of the Scandinavian reform strategy helped Esping-Andersen develop a series of key social policy concepts. Social democrats thought that achieving large popular support required a reform practice able to reduce working class misery. They aimed at suppressing the negative elements of capitalism and advocated a 'parliament-centred struggle' to achieve a 'slow revolution' through full employment and reformism (Esping-Andersen 1985: 21). Leninist strategy was reversed: the welfare state was used to alter the class power in favour of the working class movement rather than directly taking control of the means of production to build a socialist society (Esping-Andersen 1985: 22-23). The study of this strategy prompted Esping-Andersen (1985, 1990) to develop the idea of measuring welfare state generosity and variation employing decommodification and social stratification, to plant the seeds of the social investment approach, and to connect the welfare state to employment and redistribution in an international setting.

Decommodification, Social Stratification and the Seeds of Social Investment

⁴ See also Esping-Andersen and Regini (2000).

⁵ On power resources limits and contemporary insights, see Refslund and Arnholtz (2022).

Scandinavian social democracies expanded the welfare state through “collective services, unemployment and sickness compensation, employment security, and general income maintenance”, to reduce the influence of market mechanisms and therefore decommodify workers (Esping-Andersen 1985: 31). Their strategy was an alternative to the classic liberal and corporatist models that prevailed in other nations (Esping-Andersen 1985: 149).

At the theoretical level, decommodification is a concept with deep historical roots. Closer to Polanyi’s thinking ([1944] 2001) than neo-Marxists’ (O’Connor 1973, Gough 1979, Offe 1984), Esping-Andersen (1985, 1990) gave a new meaning to the term and used it to measure welfare state generosity (for a critical reflection see Room 2000). Decommodification is not defined as “the complete eradication of labour as commodity” in the Marxist tradition, rather as “the degree to which individuals, or families, can uphold a socially acceptable standard of living independently of market participation” (Esping-Andersen 1990: 37). With the social democratic model in mind, Esping-Andersen constructed a measurement of decommodification related to social transfers for those who do not work (pensioners, unemployed and sick). This generated a paradox: countries with the highest labour market activity rates are also those with the highest levels of decommodification. This is a conclusion closer to the original spirit of Swedish Social Democracy and far from Marxism. Esping-Andersen completed the measurement of welfare generosity, considering it as a system of social stratification that contributes to structure the social order. “The organizational features of the welfare state help determine the articulation of social solidarity, division of class, and status differentiation” (Esping-Andersen 1990: 55). As for decommodification, Esping-Andersen discusses three different models of social stratification and uses several indicators to distinguish liberal, social democratic and conservative countries (Esping-Andersen 1985: 58, for a typology based on the social stratification principle and factor analysis see Shalev 2007).

By employing decommodification and social stratification, Esping-Andersen (1990: 3-4) refused the linearity of previous welfare development theories. “A remarkable attribute of the entire literature is its lack of much genuine interest in the welfare state as such. Welfare state studies have been motivated by theoretical concerns with other phenomena, such as power, industrialization, or capitalist contradictions; the welfare state itself has generally received scant conceptual attention” (Esping-Andersen 1990: 18). This is still true today. The wood cannot be seen for the trees and viceversa: either big international political economy studies employ the welfare state as a tool to understand something else, or the micro approaches care little about welfare state structures. In a Mertonian sense, *The Three Worlds of Welfare Capitalism* is a middle range theory (Merton 1957) that framed the understanding of policies and policy functions, and placed the welfare state at the centre stage of international political economy.

While discussing how to sustain a universal decommodification strategy in *Politics Against Markets*, Esping-Andersen planted the seeds for what would become later the social investment approach (for an original academic formulation see O’Connor 1973, for a long *durée* perspective see Smyth and Deeming 2016). Following the inspiration of the Swedish Rehn-Meidner model (Erixon 2011), he suggested that social democrats had to allocate part of the responsibility to decommodify to the market, and justified this ‘apparent’ paradox with a power resources materialist argument. Social democrats had to acquire the means to finance a universal welfare state through full employment (therefore reducing the number of those in need of decommodification) and control of the business cycle (to guarantee adequate levels of economic investment in strategic sectors). In sum, social investment is presented on the one hand, and socialization of the investment function on the other (Esping-Andersen 1985: 35-36). The social investment approach will assume a different meaning in Esping-Andersen’s second life.

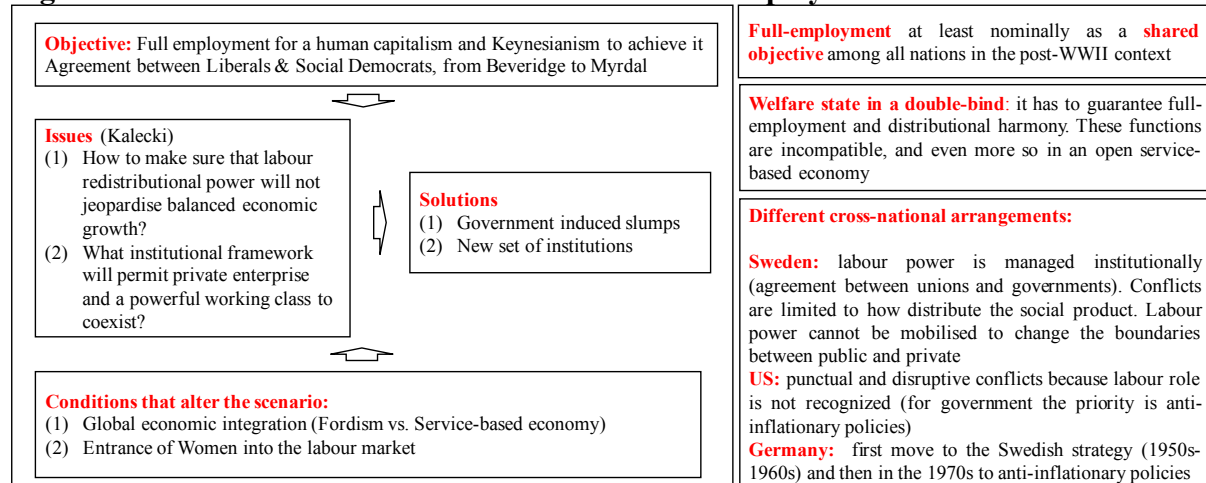
The Welfare State, Employment and Redistribution

While the classification of welfare regimes rose to prominence in the academic debate (and is widely discussed and criticised, for reviews, Art and Gelissen 2002; Ferragina and Seeleib-Kaiser 2011), the second part of *The Three Worlds of Welfare Capitalism* attracted less attention. However, the relationship between the welfare state, employment and redistribution – discussed at length in the second part of the book – is key to an understanding of Esping-Andersen's regimes, as well as the functioning of the welfare state within capitalism and the international political economy context. Also with regard to employment and redistribution, *The Three Worlds of Welfare Capitalism* is grounded in *Politics Against Markets*, where Esping-Andersen argued that pursuing a universal strategy of decommmodification would inevitably require a strong state control over economic activity in the long-run (see for example the discussion on the wage earner funds, Esping-Andersen 1985: 290).

Figure 1 summarises Esping-Andersen's considerations about the institutional accommodation of full employment developed in chapter 7 of *The Three Worlds of Welfare Capitalism* (Esping-Andersen 1990: 162-190). This chapter links together social policy and international political economy in a masterful way. At the end of WWII, liberal and social democratic thinkers like Beveridge and Myrdal agreed that full employment made capitalism more humane, and that Keynesianism was the tool to achieve it. However, full employment – because of the power this offers to the working class – would have altered the relation between capital and labour. Starting from Kalecki's (1943) essay 'The Political Aspects of Full Employment', Esping-Andersen highlighted two issues in such a context. The first was to make sure that labour redistributional power did not jeopardise growth, and, more broadly, the second was to find an institutional framework that would permit private enterprise and a powerful working class to coexist (Esping-Andersen 1990: 162). The solutions proposed by different governments ranged from the artificial creation of government-induced slumps that avoided full employment (deflationary policies, for example) to the establishment of a new set of institutions able to conjugate both objectives with a further strengthening of working class power. Esping-Andersen interpreted the relationship between the welfare state, employment and redistribution starting from these complex questions in the context of the passage from Fordism to a service-based economy. A service-based economy that is highly integrated at the international level and characterised by the massive entrance of women into the labour market (Figure 1, left side).

The welfare state, Esping-Andersen reasons, suffers a double bind: it has to guarantee full-employment and distributional harmony, yet these functions do not seem compatible in an internationally open service-based economy where Keynesianism is not the macroeconomic framework of reference. Conjugating these two functions would require state capacity for direct investment and therefore economic democracy – the solution evoked in *Politics Against Markets*. Accordingly, over the years, even in the most generous and encompassing systems, welfare state action has been limited to issues of 'how to distribute the social output' (Esping-Andersen 1990: 165). In Sweden, conflicts surrounding the distribution of social output have been limited institutionally (with agreements between unions, employers and the governments), and labour power therefore cannot be mobilised to change the boundaries between public and private. In the United States, conflicts are less regulated and this gave rise to disruptive conflicts. Organised labour is not recognised as a key actor within political economy, and governments prioritised anti-inflationary policies. Germany pursued the Swedish approach in the 1950s and 1960s, but swung to the American from the early 1970s (Figure 1, right side).

Figure. 1. The Institutional Accommodation of Full Employment



Source: Author's elaboration on the basis of Esping-Andersen (1990: 162-190).

Although belonging to different welfare regimes, these countries, during the crisis of Fordism, confronted the issue of how “to dampen prices and labor costs, strengthen the balance-of-payment situation, and assure sustained investment in the light of declining profitability” (Esping-Andersen 1990: 173). From a welfare state perspective, a fix for this issue was the so-called ‘deferred social wage strategy’. This strategy was based on an implicit agreement between workers – who accepted wage moderation to delay otherwise immediate consumption – and the welfare state that expanded citizenship rights. A good example was the expansion of pension generosity (Esping-Andersen 1990: 176). We argue that these considerations connect Esping-Andersen’s work to O’Connor’s (1973) argument about *The Fiscal Crisis of the State*. During a period of crisis, the welfare state had to make (or promise) expenditures that could not be covered with the classic economic growth dividend and full employment, and absorbed costs that it was not financially equipped to manage (Esping-Andersen 1990: 179-180). The inherent contradiction between the interests of capital and labour fell on the shoulders of different welfare regime models:

“The success of post-war capitalism lies in its capacity to harmonize democracy with private property. The synthesis of these two institutions was made possible by the ‘social contracts’ of the 1930s and 1940s, where labor committed itself to respecting the sanctity of entrepreneurial prerogatives in return for the freedom to conduct distributional struggles unhindered. [...] The stability of post-war decades had a lot to do with the capacity of class and interest organizations to find institutional arrangements within which this fundamental *quid pro quo* could work. But, if the social contract was a constant, the institutional arrangements came to diverge sharply across nations. This played a vital role in shaping not only the strength and durability of the full-employment experience, but also the capacity for arriving at stable and workable mediations between policy goals and distributional priorities. [...] Whatever institutional structure came to prevail, a common feature of postwar nations is their rising incapability of managing the altered balance of power which full employment brought about” (Esping-Andersen 1990: 187).

The functioning of a market economy in the long run places all welfare states under stress: to guarantee full employment and redistribution (the double bind) in a post-industrial economy is highly challenging. This point is key to understand Esping-Andersen’s second life and its blind spots. It has profound implications for contemporary social policy – in particular

with reference to the relationship between welfare state, employment and redistribution. This will be discussed in the final section of this article.

2.2. The Demographic Turn

Esping-Andersen's (1999) second life is characterised by the idea that the household economy is the key 'social foundation' of a post-industrial society; this perspective differs from that elaborated during his first life. Core issues for post-industrial societies are the low fertility trap connected to women's difficulties to conciliate paid and unpaid work, and the low wage/low skill equilibrium resulting from labour market deregulation (Esping-Andersen 1999, Esping-Andersen and Regini 2000). To account for these factors and to redress his previous household and gender-blind approach, Esping-Andersen took stock of critiques and insights developed by selected streams of feminist scholarship. He complemented decommodification with defamilialization (with reference to Orloff's [1993] critique), and reframed welfare regimes by considering the role of families in addition to income maintenance programmes for the average production worker (Esping-Andersen 1999: 73, 85-88). Moreover, building on Goldin's work (2006, see also Eisenstein 2009, England 2010), he argued that the revolution of women's role is 'incomplete' (Esping-Andersen 2009: 1; see also Ferragina and Seeleib-Kaiser 2015) because 'the masculinization' of women biographies is stronger in the labour market than in the household (there is a lag in the adaptation of men to care roles); and because of high social stratification in the behaviours (Esping-Andersen 2009: 53). "[...] The quest for gender equality tends to produce social inequality as long as it is a middle-class affair" (Esping-Andersen 2009: 169).

The household economy is essential to understand the role of the welfare state in this 'new political economy', as growing homogeneity provokes different results at the top and bottom of the social ladder, with conventional norms of 'doing-gender' and under-investment in children disproportionately affecting lower social strata. "Homogeneity is not a social leveller. [...] Women's earning capacity is more limited among the low skilled and this group of women is more likely to identify with conventional gender behavioural patterns" (Esping-Andersen 2009: 101). The "high skilled double-earner couple" is racing ahead of the pack, and this is even more pronounced in Mediterranean countries where the trade-off between motherhood and career is stronger and family policy does not adequately support lower class women (Esping-Andersen 2009: 11; 47-49; 60). Only social policy can help to extend "the female revolution downwards" (Esping-Andersen 2009: 101).

This selective reinterpretation of certain strands of feminist literature (Hernes 1987, Ostner and Lewis 1995, see also Lewis 1992) sparked controversy; it was a continuation of the gender debate that followed publication of *The Three Worlds of Welfare Capitalism*. "I am fully aware," wrote Esping-Andersen, "of invading upon a sociological territory that has been hugely dominated by feminist writers. I do so because I believe that there are often very ideologically based argumentations on behalf of women's causes need not to be so. One arrives at pretty much the same kinds of precepts and conclusions from a rational action perspective that aims, to identify superior Pareto outcomes" (Esping-Andersen 2009: 14-15). Lewis replied with a critical review of *The Incomplete Revolution*. She claimed that since the *Social Foundations of Postindustrial Economies*, Esping-Andersen "has been intent on 'bringing the family in. But not gender. At the end of the day, the behaviour of men and women and the contributions they make to families is of interest for instrumental reasons" (Lewis 2010: 484).

Our critique differs from Lewis; it pertains to the intersection between gender, class and the international political economy context. While the focus on women, family dynamics and demography that Esping-Andersen pursued in his second life seems a pertinent choice to understand post-industrial societies, it is seemingly difficult to explain the differences in behaviour on the labour market (or about gender norms) between lower and middle upper class

women without also resorting to the international political economy arguments that he investigated in his first life. Differences between lower and middle upper class women are also generated by how capitalism works, and therefore will go unchallenged in a system where labour is extremely weak. How can women in the middle upper class conciliate work and care – pursuing their ‘revolution’ of gender roles – without lower class women picking up the slack (see Shalev 2008)? This issue has been discussed at length in the feminist literature – e.g. ‘the nanny question’ (Tronto 2002), *feminism seduced* (Eisenstein 2009) – but has been overlooked by Esping-Andersen. We will consider this in the final part of the article.

The ‘Impossible Marriage’ between Full Employment and Equality

Despite shifting the focus to the household economy, full employment remains a key concern for Esping-Andersen (1999: 13). However, during his second life, Esping-Andersen was more interested in job rights than distributional harmony; this change of perspective is in line with the rising prominence of ‘third way’ politics (Giddens 1998). According to him (and in continuity with his first life), the mechanisms operating under Fordism which contributed to reduce inequalities are no longer in place during a post-industrial phase. This new context contributes to the stratification of employment structure and further polarises risks (on ‘new social risks’ see Bonoli 2005, Taylor-Gooby 2004). However, he suggests that the universalization of the dual earner household, which brought about an increase in purchasing power and promoted the service consumption industry, can moderate this phenomenon. “[...] Services beget services; the double earner household plays the role of employment multiplier. [...] The employment multiplier of working mothers can be quite substantial especially in those kinds of services that are labour intensive. Encouraging families to consume more external services is therefore part of a potential ‘win-win’ strategy” (Esping-Andersen 1999: 179).

It follows from this point, that the harmonization of motherhood with employment is also a bulwark against poverty, a key theme in *The Incomplete Revolution* (Esping-Andersen 2009). However, while the argument seems to hold up to empirical scrutiny, at least on the fertility aspect (Esping-Andersen 2016), more doubts have been cast about the effect of female employment on poverty. Across 15 rich OECD countries from the early 1970s to the early 2010s, a 10% increase in female employment has contributed to reduce poverty only by 1% (Nieuwenhuis et al. 2016). The cross-country comparison shows also that after an initial effect of this employment strategy to reduce poverty, the effect has levelled. Moreover, the increase of employment and unemployment rates in a context of a general weakness of labour (Korpi 2002) might lead to further reduction of wages, especially for certain categories of workers, e.g. lower class women, migrants, young people. Therefore, within post-industrial societies, a growth in women’s employment does not seem a sufficient justification to focus on a supply-side social investment strategy when considering welfare state reforms.

This point is salient when considering the service and care industry. Esping-Andersen suggested that “the move of women into paid employment implies a double job multiplier, visible on both the consumption and production side of the national accounts ledger” (Esping-Andersen et al. 2002: 68). However, a growth of services, especially in the domain of care, goes hand in hand with inequalities (as Esping-Andersen highlights himself; see Ferragina and Parolin 2022); more consumption of these services means an increase of low-paid jobs. This is particularly true in countries with lower levels of social protection and de commodification. The second Esping-Andersen and the ‘new political economy’ cannot shake off the first Esping-Andersen and the ‘old political economy of the welfare state’. The relationship between states and markets and the role of the international political economy context are crucial to understand gender, employment and redistribution also when bringing the household economy back in.

The Social Investment Approach in the Second Life

The social investment approach, although part of the old Scandinavian social democratic discourse (Esping-Andersen 1985), assumed a different meaning in the second life of Esping-Andersen for it was grounded in demography and post-industrial economic transformations. The starting analytical point for the second Esping-Andersen in elaborating the social investment strategy is the observation that countries which failed to adapt to the new economic role of women are characterised by low fertility, while the opposite happens in countries that fully embraced the dual earner model (Esping-Andersen 1999, 2016). In societies where new social risks cannot be faced by families or serviced through the market, welfare state adaptation is key (e.g. the growing and unmet need for elderly care, Esping-Andersen 2009: 80). Until the end of the 1960s, welfare states were geared to the need of the average production worker and aligned to a paternalistic model, dumping unpaid social reproduction duties on women's shoulders. Over time, starting with Scandinavian countries, the welfare state evolved to cover social risks related to care and social reproduction as well. However, adjustments in most countries are still largely incomplete (Esping-Andersen 2009: 83).

Therefore, Esping-Andersen suggests that expanding measures such as childcare services, incentives for mothers to work, and adequate income maintenance to take into account mothers' reduced labour supply and the cost of children, would simultaneously boost fertility and women's employment. In a nutshell, "diminishing labour market induced risks calls for a rethinking of education, training, and marketable skills" (Esping-Andersen 1999: 184). These policies are also vital to defend family from disintegration and moderate inequalities (Esping-Andersen 1999: 146). *Why We Need a Welfare State* proposed to extend this 'Scandinavian strategy' to other developed nations. Esping-Andersen and co-authors (2002: 5) make clear that this strategy – turned towards the maximization of employment rates – cannot work without appropriate income support policies. Activation cannot replace compensation (Esping-Andersen et al. 2002: 59).

Esping-Andersen argues that welfare states historically aimed at social protection more than redistribution, focused on equality of opportunity more than equality of outcomes, and framed this commitment in class terms (Esping-Andersen 2009: 112). However, most countries did not witness a substantial equalization of opportunities (Erikson and Goldthorpe 1992) because they did not sufficiently intervene to support childhood (Esping-Andersen 2009: 112). By employing arguments developed in sociological (Bourdieu 1977) and development psychology studies, Esping-Andersen claims that interventions on children have a much higher impact – both in absolute terms and for reducing inequalities – than those committed at other points of the life course (Esping-Andersen 2009: 133). Therefore, he proposes to tackle the main 'family effects' during childhood (the role of money, the role of parental time investment, and the influence of family learning culture) that generate inequality and future economic inefficiency with a universal social investment strategy (Esping-Andersen 2009: 122) supported by a child poverty reduction. He recasts the old precept of Titmuss within his social investment package: targeting can be effective only as an additional strategy for poorer children once universal policies have already played their role (Esping-Andersen 2009: 140).

The support for children is linked to women's economic role. Using data from Pasqua (2001), he argues that if Spanish women would adopt the employment profile of their Danish counterpart, the Spanish GDP would grow by 15% (Esping-Andersen 2009: 86). This cross-country difference is mostly explained by the "huge female labour market created within the welfare state" (Esping-Andersen 2009: 102). Other than participation rates, Esping-Andersen's also considered the compatibility between care and career, showing that care activities (both towards children and the elderly) are more frequent and less intense among women in Scandinavia if compared with Mediterranean countries. This means that "in Scandinavia

virtually no woman need curtail her career in order to care for kin; in Southern Europe it remains the norm” (Esping-Andersen 2009: 95).

Although richly insightful on the domestic side of the story, this view considers welfare states as isolated and not part of the international political economy context. The difference between Spain and Denmark is also a by-product of labour market opportunities and the position of the two countries within international political economy – something that social policy can only partially address. Comparative data on wage growth help to illustrate this point (Table 2). During the period 2000-2022 wages decreased in Greece, Italy, and Spain (and increased only very marginally in Japan and Portugal). Moreover, the average annual wage growth rate among richest OECD countries stagnated (with an annual growth of 0.73%); only a handful of countries displayed an annual increase above 1% (in this narrow group Scandinavian countries feature prominently). This stagnation is even more pronounced when considering the period after the 2008 crisis⁶ (displaying an annual wage growth of 0.31%). We argue that the state-centric way to look at social policy is generalised in the field, and brought scholars to talk about ‘growth regimes’ (Hassel and Palier 2021) without considering the international political economy context of ‘competitive austerity’, countries’ different position within it, and the nature of the distributive conflict (about the role of ‘competitive austerity’, see Cafruny and Ryner 2007; see also Blyth 2013).

Table. 2. Variation of Wages, 2000-2022
Measured in 2022 Constant prices

		Wage Variations in the Long Run			Annual Wage Variations		
Country	Unit 2022	2000-2022	2000-2008	2009-2022	2000-2022	2000-2008	2009-2022
Australia	Aus. Dollar	23.22%	12.31%	10.74%	0.91%	1.30%	0.73%
Austria	Euro	10.90%	7.91%	1.06%	0.45%	0.85%	0.08%
Belgium	Euro	6.43%	2.93%	1.98%	0.27%	0.32%	0.14%
Canada	Can. Dollar	26.92%	11.82%	12.77%	1.04%	1.25%	0.86%
Denmark	Dan. Krone	23.28%	14.22%	5.38%	0.91%	1.49%	0.37%
Finland	Euro	20.34%	13.32%	5.29%	0.81%	1.40%	0.37%
France	Euro	20.76%	8.55%	7.82%	0.82%	0.92%	0.54%
Germany	Euro	14.79%	2.14%	12.37%	0.60%	0.24%	0.84%
Greece	Euro	-12.81%	19.06%	-30.07%	-0.59%	1.96%	-2.52%
Ireland	Euro	37.94%	26.97%	-0.75%	1.41%	2.69%	-0.05%
Italy	Euro	-0.87%	3.48%	-4.94%	-0.04%	0.38%	-0.36%
Japan	Yen	0.20%	0.08%	1.57%	0.01%	0.01%	0.11%
Korea	Won	51.73%	20.69%	25.07%	1.83%	2.11%	1.61%
Luxembourg	Euro	21.95%	7.33%	10.19%	0.87%	0.79%	0.70%
Netherlands	Euro	5.27%	5.99%	-4.69%	0.22%	0.65%	-0.34%
New Zealand	NZ Dollar	39.15%	19.23%	15.29%	1.45%	1.97%	1.02%
Norway	Nor. Krone	47.50%	27.40%	14.58%	1.70%	2.73%	0.98%
Portugal	Euro	3.06%	-2.13%	0.65%	0.13%	-0.24%	0.05%
Spain	Euro	-0.39%	2.72%	-8.78%	-0.02%	0.30%	-0.65%
Sweden	Swe. Krona	33.88%	18.55%	12.54%	1.28%	1.91%	0.85%
Switzerland	Swiss Franc	20.12%	10.23%	6.84%	0.80%	1.09%	0.47%
United Kingdom	Pound	20.05%	16.70%	3.13%	0.80%	1.73%	0.22%
United States	US Dollar	26.72%	7.98%	16.18%	1.03%	0.86%	1.08%

Note: Annual wage variations are calculated as follows: $(FV/IV)^{(1/n)} - 1$. Where FV is the value of the last period considered, IV is the initial value, and n is the number of periods considered.

⁶ All countries displayed a higher wage growth in the period 2000-2008 than in the period 2009-2022 with the exception of Germany, Japan, Portugal and the United States.

Source: Author's calculation from OECD (2023).

Therefore, the implementation of a balanced social investment strategy appears complicated in a climate of ‘permanent austerity’ (Pierson 2001). This is especially true in countries that have retrenched compensatory policies (Ferragina 2019, Ferragina 2022) – which are mostly directed towards the lower classes – and reduced the investment capacity of the state in the passage from Keynesianism to monetarism. While Esping-Andersen in *The Incomplete Revolution* suggests the necessity for lower class women to follow the lead of the middle upper class and, with the support of the welfare state, indulge a revolution in gender roles, the international political economy dynamics make this development virtually impossible. The approach that Esping-Andersen championed during his second life seems to overlook political coalitions, power resources and, most importantly, international political economy; these had been key elements in the analyses he developed during his first life.

3. A CRITICAL APPRAISAL OF ESPING-ANDERSEN’S *CORPUS*: RE-EMBEDDING SOCIAL POLICY INTO INTERNATIONAL POLITICAL ECONOMY

Broad vs. Narrow Views of Social Policy

Esping-Andersen distinguished between a broad and a narrow view of social policy. This distinction is useful to understand not only his trajectory but also the evolution of social policy as a field of study. The broad view of social policy frames the understanding of the welfare state as an issue which is related to changes within international political economy. “In the broader view the issues of employment, wages, and overall macro-economic steering are considered integral components in the welfare state complex. In a sense, this approach identifies its subject matter as [...] ‘welfare capitalism’ ” (Esping-Andersen 1990: 1-2). The narrow view of social policy is the traditional terrain of social amelioration; it is an approach under which policies and their potential effects are analysed without taking into account (or considering as fixed) the international political economy context.

Moving on from these two views, we argue that the connection between social policy and International political economy in Esping-Andersen and welfare state research has changed in the last decades. Esping-Andersen established a strong link between the two in his first life: initially in *Politics Against Markets* to illustrate how social democrats could sustain a universal decommodification strategy within capitalism, subsequently in *The Three Worlds of Welfare Capitalism* to capture different levels of welfare state generosity and explain the trajectory of different types of post-industrial economies in relation to international political economy and the labour market structure (a point partially reinterpreted thereafter in the *Social Foundations of Post Industrial Economies*). In *Why We Need a Welfare State* and *The Incomplete Revolution*, however, Esping-Andersen considered this link from a narrower angle, pursuing his demographic turn and developing a child-oriented social investment approach. In this latter, the connection between social policy and political economy is reduced to the necessity of reconciling women’s employment and motherhood and investment in children. The ‘international’ side of the equation was lost.

The narrowing of Esping-Andersen’s perspective mirrors the parabola of social democratic ideas from ‘the road to power’ to a social investment approach anchored within liberalism, but also the evolution of social policy as a field of study. At first, interpretative frameworks revolved around power resources or focused radically on the relation between welfare states and markets (e.g. Korpi 1978, 1983, Stephens 1979, Esping-Andersen 1985; O’Connor 1973, Gough 1979, Offe 1984); then over time, and in parallel to a dramatic International political economy and ideological shift, a progressive narrower view of the link

between social policy and international political economy became customary in the discipline. Today even when political economy is considered in welfare state analysis, the focus is mostly on national dynamics, almost as if markets could be fully regulated by national institutions. Therefore, contemporary social policy ended up considering welfare state interventions mostly as a specific fix to current social issues, or as a support for the functioning of national markets that should not fundamentally challenge distributional outcomes. In this process, the connection between social policy and international political economy to investigate key social outcomes has been largely disregarded.

An example related to growth models can help make this point clearer in relation to social policy (for a formulation see Baccaro et al. 2022, Schwartz and Blyth 2022: 99). For 30 years (till the early 1990s), Italy was the second fastest growing economy in the developed world. Then its growth halted and the country's economy stagnated till present days. Scholars developed arguments to decipher this puzzle at the domestic level – demographic decline, corruption, lack of functioning of the political system – but none could fully explain Italian stagnation. It has been argued that also the impact of the international political economy context on key domestic factors is very important to understanding the Italian evolution. First, the European monetary integration influenced a productive structure disproportionately based on small and medium enterprises. This left Italian firms unsheltered against the competition of German firms, because it curtailed the possibility to rebalance the economy with a devaluation of the national currency. Second, the passage from Keynesianism to monetarism reduced the capacity of the Italian state to invest in industrial policy to compensate for the historical lack of private investment. State steering of industrial policy was the norm during Fordism through the *Istituto per la Ricostruzione Industriale* (IRI), which was a publically owned conglomerate of public firms – “the largest non-oil producing company in the world outside the US”⁷ (Ciocca 2014). IRI boosted research and development and strongly supported employment in the country (Pontarollo 1987). Its privatization during the 1980s and early 1990s – among some domestic factors – was also the by-product of strong pressures from the European commission to fulfil the requirements of competition law.

We argue that a critical reading of Esping-Andersen's *corpus* allows us to point to similar blind spots in social policy. To understand the contemporary relationship between welfare state, gender, employment and redistribution, we have also to consider the issues Esping-Andersen raised in his first life, reviving the connection between social policy and international political economy. In particular, within a post-industrial economy, the notion of the double bind of the welfare state is key to interpret new social policy paradigms, policy options, and achievable policy objectives. A careful reading of the first Esping-Andersen shows that the solution he proposes to lighten the double-bind in the second life, namely the women friendly and child-oriented social investment approach, is simplistic because it does not consider the key role of the international political economy context.

The Importance of International Political Economy to Study Contemporary Social Policy

To invoke the ‘Scandinavian way’ for all European countries presupposes at least two conditions. The first is the implementation of a policy package focused on the supply-side, as for example was developed organically in Sweden through the active labour market policy component of the Rehn-Meidner plan and employment-oriented family policy thereafter. The second is a mixture between universal and generous compensatory social policy and the consideration of the position of each country within international political economy. Countries that managed over time to conjugate a social investment social policy package, the maintenance

⁷ <https://bit.ly/3FPrDEz>

of a generous and universal income support, and a relatively moderate level of inequality⁸ are structurally geared towards growth models that include a positive trade balance based on a dynamic export component of high quality products and services. This component has compensated for the reduction of policies stimulating internal demand after the decline of Fordism, and the shift from Keynesianism to monetarism (Baccaro and Pontusson 2016).

The first condition, in countries where income support has been retrenched (or never structurally developed) and the position within the international political economy context is unfavourable (e.g. because of a negative trade balance and/or the incapacity to compete for high-quality export due to low levels of productivity), is almost impossible to attain because of insufficient fiscal resources. Even if this condition could be reached, it would probably work against the lower classes, for the growth of employment rates in these countries in a European context of ‘competitive austerity’ – characterised by insufficient monetary and fiscal tools to boost demand – is likely to exert downward pressures on wages which in turn could curtail even further domestic demand (see the low annual wage growth in the last decades across rich OECD countries, and Mediterranean countries in particular, Table 2). This implies that Esping-Andersen’s idea to foster a similar ‘women’s revolution’ in Spain and Denmark might actually have negative consequences because of fundamental international political economy constraints. Some of these constraints were considered in *The Three Worlds of Welfare Capitalism* when the double bind of the welfare state was discussed, but Esping-Andersen shied away from connecting these issues throughout his second life. We argue that this can be explained by Esping-Andersen’s choice to employ a narrower view of the link between social policy and International political economy, which then influenced contemporary social policy discussions about social investment and growth regimes. These discussions overlook the distributional consequences of focusing on the supply side in countries with stagnating domestic demand and low levels of income support (but see Baccaro et al. 2022).

This reasoning has implications for gender equality also. *The Incomplete Revolution* thesis concerning women’s role in the economy and society can be interpreted differently if insights from the first Esping-Andersen are integrated, and is propped up by a broad view of the link between social policy and International political economy. Labour market deregulation is a brake to gender equality and is reducing the emancipatory power of the massive entrance of women in the labour market (Eisenstein 2009, Abramovitz 2017). Only middle upper class women, those who gain access to the core of the workforce and are partly freed from unpaid household work, seem to benefit from the post-industrial sexual contract. Lower class women, who are not in position to outsource social reproduction tasks, are locked in low-paid jobs, and their quality of life does not improve with the generalisation of the dual earner model (McDowell 1991: 416, for a discussion within social policy see Daly 2011). They therefore constitute cheap labour available for the needs of the service-based economy (Ferragina 2019). In Scandinavian countries, a developed active supply-side labour market policy, employment-oriented family policy, and a successful export strategy (complemented by easy credit and high private debt to foster consumption) allows a large share of women to experience a positive conciliation between employment and motherhood, whereas these conditions in a context of competitive austerity do not characterise most countries in Europe. There is the need for a strong demand side or positive export trade balance to pursue a complete revolution of women’s role. However, not all countries can subsidize their welfare state successfully through exports (or further increase private and public debt). In the current context, to suggest that Spanish women should follow the lead of Danish women to boost the GDP, and therefore allow the financing of more generous universal decommodifying policies, appears more as wishful thinking than as achievable policy objective.

⁸ Although sharply increasing because of the reduced reach of collective bargaining agreements.

Moreover, as social reproduction activities are increasingly considered an obstacle for emancipation (and have therefore to be externalised to states or markets), the idea that gender equality can be pursued mostly through higher employment levels might encourage their further depreciation (Federici 2004). The flip side of this depreciation in the labour market is the socially constructed idea that care is an activity for unskilled workers (Ferragina 2019). This cultural construction conspires against higher wage levels in the labour market activities that women mostly fulfil (Folbre 1994: 102), and lessens the opportunity for a balanced social investment strategy outside of Scandinavia.

Childcare offers us a good example. On the one hand, Esping-Andersen's approach in *The Incomplete Revolution* presupposes an expansion of the public sector to cater for childcare needs of all social classes. On the other, and especially in countries that cannot afford to publicly subsidize these services, the only way forward is to reduce costs because of their position within international political economy. This issue is particularly pronounced for European countries that have to deal with the constraints posed by the optimal currency area. This means low wages for these essential care workers, a situation which of course favours those who can afford care and further penalises those who cannot or are employed in care and service jobs. Once again, the insights of the first Esping-Andersen help us to understand some blind spots raised by the second.

The Revival of a Research Programme

Taking a critical perspective of Esping-Andersen's *corpus* opens avenues for the revival of a research programme. Our key proposal here is to return to a broad view of social policy and integrate social policy and international political economy to understand the complex relation between gender, employment and redistribution. With this in mind, we need to take stock of both Esping-Andersen's lives and re-elaborate his insights. Scholars should recognize the decisive mediating role of the welfare state between states and markets and the accrued double bind of the welfare state in a post-industrial economy, in order to investigate issues related to gender equality, employment and redistribution.

Therefore, a balanced social investment strategy that connects growing productivity, gender equality and redistributive harmony can be implemented beyond Scandinavia and exporting economies only where there is a sustained internal demand. From this perspective, the original Swedish social democratic approach and its Rehn-Meidner model might be the lodestar to develop a new social contract. However, within largely open economies this would require: a strong paradigm shift in monetary policy, a change in the international political economy context, and in the case of European countries an acceleration of the integration process towards a fiscal union with a stronger role of public economic planning and investment (Mazzucato 2011). In this respect, a more modest proposal for future research is to consider the effect of policies and the possibility for policy transfers with more awareness to the context. This might help social policy scholars to suggest new gradual policy strategies tailored to the particular position of each country within the international political economy context.

The generalised climate of crisis across OECD countries and important international developments are already prompting reflections at the meeting point of social policy and international political economy. The recent review of the redistributive and social policy consequences of inflation (Beland et al. *Forthcoming*), the analysis of family policy from a critical and international political economy perspective (Ferragina 2019), and the investigation of welfare state change as a Polanyian double movement (Ferragina 2022) constitute some noteworthy examples. These works revive a long tradition in welfare state studies (e.g. O'Connor 1973, Gough 1979, Offe 1984, Esping-Andersen 1985, 1990, Jessop 1993, Ebbinghaus and Manow 2001, and more recently Hemerijck 2013, Streeck 2014, Taylor-Gooby et al. 2017), and propose to reintegrate the study of social policy change with some

elements customarily considered in international political economy. We refer for example to the evolution of monetary and productive systems, the expansion of the market logic, the role of austerity in curtailing demand, the position of countries within international political economy, and questions of exchange, inflation and debt. Therefore, a new research programme should be grounded in the insights gathered from broad international political economy studies. However, the advances developed in studies centred on specific policies and demographic variables should not be neglected. The consideration of both Esping-Andersen's lives invites a Mertonian middle ground to be defined between two scholarly camps that rarely talk to each other.

To conclude, the current context is characterised by growing inequalities and the declining legitimacy of western democracies, and it calls for a broader approach to social policy research. This approach should continue to reflect on demographic trends and family dynamics, but also regain sight of the connection between social policy and international political economy, as highlighted by the first Esping-Andersen. We hope social policy scholarship of the future will embrace his seminal work, both holistically and critically, and move beyond a simplistic use of his typology and the universal proposition of a Scandinavian style social investment approach. Ultimately, this view overlooks the complex intersection between gender and class, the different positions of countries within international political economy, and the distributional conflict.

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