

## THE WELFARE STATE: TOO PRECIOUS TO FALL

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### Abstract

The Welfare State is the political institution that further took the idea of solidarity and social justice in the History of Humanity. Unequally developed in the world, it reached high levels of efficiency in Europe in improving the living conditions of the populations and in promoting social rights. It is, however, under pressure from financial constraints and threatened politically and ideologically by neoliberalism and financial capitalism in a globalized world.

Therefore, in the last decades, the word “crisis” is, perhaps, the most often used in the debates and research on the Welfare State. And yet, the Welfare State goes on showing trends of expansion, finding paths to evolve, and is, indeed, concerned with a new set of challenges that require the development of new functions. The present paper’s objective is analysing these challenges and functions, in a global perspective, focusing on the ones that are already being tackled and developed, and putting forward the new technological and environmental ones, that are emerging and not yet fully known.

**Key Words:** Welfare State; New Risks; New Functions

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## 1. Introduction

The Welfare State corresponds to one of the forms of the Nation-State whose main specific characteristic is the centrality of social policies and the institutional apparatus linked to them. In addition to the traditional functions of defence, diplomacy, administration of citizens, territory and justice and a monopoly on the legitimate use of violence, the Welfare State is based on the social contract between labour and capital (institutionalized industrial relations), ensures the regulation of the markets, including labour market, and the protection against social risks, public education and health, employment, the integration of immigrants and particularly vulnerable groups, and the protection of victims of violence and children at risk, among other sectors. The Welfare State has a decisive presence in societies, absorbing a huge portion of the State Budget and justifying the assembly of large bureaucratic apparatus dedicated to the implementation of social functions.

It has a long history of more than 130 years and, in the configuration it assumed in Europe in the last 75 years, is considered nowadays one of the biggest inventions of humankind (as the Brazilian ex-President Lula da Silva classified it), from the perspective of solidarity, equity, equality, social justice and fight against poverty.

In recent decades, the Welfare State has been challenged by a set of changes that have taken place in European economic, political, and social systems. Since the 1980s the foundations of the social model that allowed Europe to enjoy decades of peace, democracy, economic growth, and social well-being, have profoundly been shaken and the political consensus on the role of the Welfare State that prevailed since the end of World War II finished (Esping-Andersen, Gallie, Hemerijck & Myles, 2002; Bonoli & Natali, 2012).

It is the very architecture of the European Social Model that is under pressure. The balance between the state, the market and society (Stiglitz, 2002) has changed, thus pressing the fundamentals of the political economy and social arrangements in current societies. Different visions of the design of the political, social and economic institutions and of they are articulated are at stake. The performance of these institutions and the respective effects for the economic competitiveness and the sustainability of the social policies are being actively discussed. The debate includes three main issues.

The first one is about the financing of sound and generous pension policies (Glennerster, 2010). The impact of ageing on pension and health systems (Bonoli & Natali, 2012; Ebbinghaus, 2011) demands more resources; if the present schemes are to be kept. Can the system go on being supported by the contributions of workers and employers alone? Will the young generations, frightened by the danger of not meeting their expectations when it comes for them to go, be available to pay the levels of wellbeing of the retired ones? The pressure is huge, and the problems are delicate. Furthermore, the crisis of financial capitalism produced a great impact on public debts, making it more difficult to find available resources to address increasing expenses (Crouch, 2011).

The second is about the impact of globalization and liberalization of markets on the distribution of power at the world level. The awakening of new great world economic

powers and new global players, namely the rise of mega-companies (Crouch, 2004), unbalanced the power relation between social classes that prevailed during the post-war period. In this period of rapid economic growth stimulated by neo-Keynesian policies, productivity gains were distributed in a divided way between capital and labour, a situation that has changed since the 1980s, with a great advantage for capital. This was the result of the imposition, on the part of these mega-companies, of more liberalized political environments. Empowered enough to corrupt and influence governments, these new global actors imposed policies of deregulation of the markets (including the labour markets), wage restraint, tolerance for companies' tax evasion and speculation, among other policies that led to the increase in inequality and poverty, reversing the historical trend towards its eradication, the ultimate objective of the Welfare State.

The third issue is about the fourth industrial revolution and the emergence of the knowledge economy and the information society. New technologies have dramatically increased labour productivity and the ability to accumulate capital on a global scale, but have also produced unemployment among less qualified workers, market segmentation (Cohen, s.d.) and individualization and instability in industrial relations (Sennet, 2004). With the permanent threat of "relocation", in a context of the dramatic reduction of the social class of industrial workers, capital achieved the great goal of the decline of the labour movement (Esping-Andersen, Gallie, Hemreijck & Myles, 2002); Crouch, 2005), that had been the support, along with the democratic political elites, of the Welfare State. At the same time, the family model of the single male breadwinner came to an end. The diversification of family organization models and questions of gender equality (Taylor-Gooby, 2004) raise new demands for public social services and facilities adapted to the real working and family lives nowadays, in a context of financial constraints and shortage of room to adopt growing expenses and responsibilities of the State.

How is the Welfare State reacting to these processes: declining and running to the bottom, or adapting and developing new solutions to old and new social problems? Let's look at the historical process of the Welfare State development, to try an answer to these questions based on verifiable facts and not just on ideological judgements, as it is the case too often.

## **2. A long history of success**

The Welfare State is a European invention created in the late 19th century, which peaked after World War II. At its origin are the social problems created by industrial capitalism, which in return provided it with the financial means and the object, the "social problem" of poverty among the working classes.

Old protection mechanisms against risks such as old age, disability and illness have been destroyed; or reduced in their effectiveness. Such is the case with charities and, mainly, with the proprietress family, typical of peasant societies. Missing the necessary means, the nuclear families of proletarians could not attend to the basic needs of their members in situations of the impediment to work, which, together with wages at prices close to the simple reproduction of work (the variable capital mentioned by Marx),

generated an extensive situation of poverty and misery among the class of manual workers. Capitalism thus created a social class that would serve as the main support for the Welfare State, aware of its interests and committed to protecting itself collectively against the main risks generated by the capitalist economy. Some fringes of this class had gone further and, as they did in the Paris Commune, formed political parties determined to seize power and establish communism.

At the same time, European nation-states were facing the process of consolidating their power and looking for markets for the goods mass-produced by their economies. In the resulting confrontation, they needed to win the support of their peoples, who were then made up mostly of industrial workers. The interests of political elites in obtaining support for their imperialist plans (of which the most notable case was Bismark, who created the first system of protection measures based on the logic of social insurance financed by contributions from workers and capitalists and managed by the State ) thus joined the process of institutionalizing the labour movement, giving rise to systems of protection against the risks of unemployment, old age, disability and illness, first in Germany and then quickly extended to almost all of Europe and North America (Mozzicafreddo, 1997; Kuhnle & Sander, 2010).

Sixty years later, it was also in a full conflict between the Capitalist States and under the communist threat that, during the Second World War, the term “Welfare State” was coined and the agreement between capital and labour that would be implemented after the armistice was designed by Democratic-Christian and Social Democratic parties. According to this agreement, capital forgoes an important part of its profits to ensure the well-being of workers, while they abandon the objective of the proletarian revolution. The political framework is marked by the triumph of liberal democratic regimes, with a strong presence of the State in the Economy, ensuring control of strategic sectors and the promotion of quality public services. Particularly relevant was the labour market regulation by social partners, under the auspice of the State, promoting agreements for the political formation of salaries, improving working conditions and institutionalizing class conflict. Poverty alleviation was one of the main results (Capucha, 2005).

Indeed, democratic states emerged from the war with strengthened authority and in a position to collect more taxes, reinvested in R&D, equipment and infrastructures of all kinds (much of it within the scope of what companies call “externalities”) and in new policies beyond protection against traditional risks, namely education, health, housing and family. These investments allowed to increase the technological base of the industry and the qualification - satisfaction of labour, which together resulted in great gains in productivity and economic growth. These gains fed continuously, in a circle that seemed to be self-reproducing, capitalist accumulation, investment, the remuneration of labour and the generosity of social policies, the expansion of consumption and, then, the eradication of poverty, which wasn't the objective, but was close in several countries (Novak, 1988).

The appearance of the “affluent worker” John Goldthorpe and David Lockwood talked about, and the ageing of the population, are two of the main achievements of the Welfare State, stating its value and importance for people's satisfaction. The story of the Welfare State is, therefore, a successful one.

As Esping-Anderson (1990) explained, this story is far from linear and uniform. On the contrary, in Europe, it knew three distinct models: the continental or corporate, the Scandinavian or social democratic and the Anglo-Saxon or liberal. And the rhythms of building a Welfare State in different countries were far from synchronized. The main difference is in the degree of "de-commodification" and "defamiliarization" of well-being, that is, in the specific combination of responses based on the State, the market and families and the relative weight of each of these spheres in the welfare-mix that any regime comprises.

In the same logic of typifying welfare regimes, some authors have proposed the autonomy of the Southern European model concerning the continental one originally suggested by Esping-Andersen (Ferrera, Hemerijck & Rhodes, 2000), and it has also been proposed the extension of the analytical model to classify other regions of the world in this domain, speaking of the Asian, Latin American and African models (for example, Gough & Wood, 2004).

It is possible, therefore, to support the idea that Welfare models encompass a-much wider geography than the European one. Considering indicators as the sectoral emphasis (in some cases emphasizing protection, in others, education, etc.), the intensity of public spending and the effectiveness of poverty alleviation, it is possible to cluster all countries in the world, considering Europe as the hard-core of social policy systems, comparing to which the Anglo-Saxon world outside the old Continent is in the periphery, Eastern and Central European countries in the next fringe, followed by Latin America, Asia and, excluded, almost outside, India and its surrounding regions and Africa. Seen in this light, the idea that the Welfare State has entered its epilogue seems strange.

### **3. The beginning of the fall, or a new set of functions for the Welfare State?**

#### **In Europe**

When considering social policies from a historical perspective and their diversity in space, it seems evident that there are no finished or perfect models, they all have their weaknesses and, obviously, their development potential. In the case of Europe, at least, it is far from the announced fall of the Welfare State. The weight of Welfare State institutions, their impact on people's lives and in all economic and political balances, does not permit the "race to the bottom" announced by neoliberals. As long as they can vote, citizens, even the ones ideologically more vulnerable to the neoliberal propaganda, will choose governments that ensure that their social rights are respected. The value attached to the Welfare State is high (Almeida, 2013).

Bretton Woods today has more economic and eventually political power in the world than the UN or the UE, but in Western and Southern Europe, the impact of neo-liberalism has tended to be absorbed by the institutions of the Welfare State so far. In fact, beyond the foam of neo-liberal propaganda, what happened was that social spending has

not stopped increasing, more rapidly in countries that were lagging, and even in liberal Great Britain did not decrease in last decades, remaining stable at relatively high levels.

For granted we can take nothing but that the Welfare State goes on changing its objectives, financing mechanisms, regulation tools and performance, within the frame of the conditions imposed by its institutions. Following the footsteps of Hall & Soskice (1995) and Goodin et al. (1999), two paradigms of social, economic and political organization are disputing the stage. One of them considers that the market has the power of finding by itself the good way of distributing resources on an equity basis. Therefore, the social policies are considered to be a cost that weighs on economic competitiveness, the reason why calls for the retrenchment and the dualization of policies and reducing state functions to a minimum of “safety nets” and basic services (Levy, 2011; Emmeneger, Hausermann, Palier & Sleeleib-Kaiser, 2012).

The other considers social policies as an investment in people and society that is put into effect through active and universal social policies (Hemerijck, 2012). Welfare policies and other social policies are not only necessary for social reasons, but also economic and political reasons. These paradigms may be seen as virtual ends of a continuum, with the Anglo-Saxon countries moving towards the former, most of Continental Europe showing little signs of movement in the two opposite directions, and the Scandinavian countries remaining close to the latter.

The two paradigms have produced different results in terms of economic growth, employment and social cohesion. These differences became more visible after 2008, when some of the constraints mentioned at the beginning of this paper intensified and others emerged, although during the current pandemic crisis the social investment paradigm prevailed, when public policies of health, research, labour and social protection became the only hope for citizens.

Anyway, the two paradigms are expected to go on controversial and evolving around four analytical vectors: The first is about the functions and objectives of the Welfare State vs. the effectiveness of its performance (Bauer, Jordan, Green-Pederson & Héritier, 2012). A discussion on what the objectives and functions of the Welfare State are in the current socio-economic context is an inevitable part of the ongoing changes. The “traditional” objectives of protection from social risks (unemployment, age, illness, labour injuries) and regulation of the labour market have been enlarged with new functions of massive schooling for longer periods of life, universal health care, protection of vulnerable groups, like children, promoting social care services, housing, and integration of people with disabilities and migrants, and now are in a process of adding new functions derived from the growing economic, social and political recent dynamics. But while some schoolers claim that a part of these policies should be abandoned to the market, families, and civil society organizations, others struggle to address the new problems of employability and training of the working-age population, poverty and social exclusion, technological transition, and the organization of urban areas, coherently integrating these areas in the institutional order of the Welfare State. This involves evaluating the design and effects of the policies in terms of equity and social justice, reducing inequalities, but also how the state has adapted itself to new objectives such as economic sustainability, empowerment, participation, security, and quality of life. Moreover, it involves

determining how effectively the Welfare State fulfils its role as social and economic regulator (Stiglitz, 2002), and as the promoter of fundamental social balances promoting the stability of institutions in a world of intense and increasingly complex demographic, economic and social dynamics.

The second concerns the financial sustainability of the Welfare State (Hemerijck, 2012). Must social policies be cut in line with the budgetary constraints imposed by expenditure limits, or could they constitute active resources for economic growth and increasing state revenues, while, at the same time, making the economy more sustainable and productive? On this regard, neoliberals claim that economy should be free from what they say is the burden of the State and excessive taxes on companies, impairing global competitiveness, the objective that should subordinate all the others. Others argue, on the contrary, that the quality of the society is an important productive factor, moreover in the context of the knowledge economy. Therefore, more than being made possible by continuous economic growth, social policies have a positive economic impact, as a result of the qualification of human resources and efficiency gains in the administration. It is equally relevant to address the alternative methods of financing the system and the equitable division of duties and rights vis-à-vis the goals of consensual policies, taking into consideration that the Welfare State has a cost (Barr, 2012). The experiences that are in course like de basic income and negative taxes, the proposals for new taxes upon the great fortunes and speculative capitalism, as well as the adaptation of social policies enlarging the partnership between public and private sectors in the context of an increasingly complex welfare-mix, together with the fact of keeping the levels of social expenses, or upgrading them in-almost all European countries, show that the rhetoric of the unsustainability of the Welfare State is far from telling the truth.

Third, it is under redefinition the question of legitimacy. Future policies imply ideological choices as well as governability focused on different interests, some more individual (the value attached nowadays to the individual does not mean that individuals cannot be solidary, only means that they must be taken into consideration in the design of public policies) and others more universal (Bauer, 2012). The problem of governability takes a central place in the debate insofar as transparency, openness, institutional design and the fulfilment or frustration of citizens' expectations will reflect on the degree of legitimacy of each paradigm, and also, it is argued, on the quality of democracy and the strength of the actual democratic regime. The question requires urgent responses; since mega-companies are imposing a political culture that drives governments to act often not in favour of common citizens, but of powerful interests. The result is growing inequalities, discrimination against strangers, and feelings of insecurity, the pasture where anti-democratic movements get feed. This is, therefore, an issue of utmost importance.

Finally, the question of agents and responsibilities. This involves understanding the social base supporting each paradigm. In increasingly complex societies, the political process implies strategic alliances and commitments that lead to a new social pact that assures sustainability, performance, governability and the future of the Welfare State. Neoliberals have the power of money in their favour and, with it, a strong influence on the media and control of the devices of ideological inculcation and opinion-makers. In defence of the Welfare State militate the unions, the left political movements and the citizens

whose present and future depend on it, in particular, the manual and service workers and the retirees, who are much more numerous, but with fewer power resources. Namely, these agents have not found yet the terms and fundamentals of a new social pact. On this new pact may depend the outcome of the confrontation between the two paradigms, that of the sacralization of markets and retrenchment of the Welfare State, and that of social policies as an investment.

#### 4. Outside Europe

With the expansion of industrialization outside the countries of the Global North, a working-class is being born, subjected to living and working conditions that we can call neo-slavery (Moreno & Jiménez, 2018). The expansion of bureaucratic administrations, and the digital economy is also creating new middle classes in these countries. But not only their interests, or their perception of their interests, do not converge, but they are also not organized and capable of acting on the political arena. As democracy does not exist or is a faint image of what it should be in almost all regions where industrialization is advancing, the possibility of leading governments to act on behalf of those classes and their welfare is also weak. Thus, in the absence of consolidated Welfare State and political democracy institutions, neo-liberalism manages to impose its agenda without great limitations.

But there is no guarantee that this will continue for-ever. Civil movements for freedom and democracy are active everywhere, and in their midst, they can carry an embryonic but growing labour movement. In this regard, Brazil and the recent case of its Workers' Party, may-be a harbinger of wider phenomena. But even under the current conditions, in many regions of the Global South, social policies have been implemented that reinforce the conclusion that the Welfare State, instead of withering away, is indeed expanding.

Not everywhere. In fact, in the case of “end of line” countries, in Africa and the Indian sub-continent, the de facto Nation-State is missing. There, only a few countries are taking some timid steps, such as the mother's subsidy in Angola, the micro-credit approach, or the employment quotas for people from the excluded caste in India. In other regions, with institutionalized States, policies with greater ambition are being tested, such as social pensions in South Africa, the Bolsa Família in Brazil, Social Security accounts like the ones created in Singapore and Malaysia, and several other conditional and categorial cash transferences. The more developed countries, with proto systems of Welfare resulting from the combination of surviving aspects of old systems and current efforts to improve the living conditions of citizens, as in South America and Eastern Europe, are advancing slowly. The advances of Obama Care in the USA also go in this direction. However, all these countries have a common problem: there are no consolidated basic institutions of the Welfare State, on the one hand, and the agents that promote it, be they political actors, be they movements and social classes, are weekly present, on the other hand. And as we have seen, first and second-generation rights (civil and political) are taking priority.

The European model of Welfare State is, probably, not repeatable, but that does mean that other models cannot be developed.



## 5. Conclusion: new risks call for new objectives

Despite the neoliberal pressure in favour of the dualization of the Welfare State (cuts in universal social policies, reduced to safety nets and means-tested policies, along with the expansion of the private sector in provisioning wellbeing and covering social risks), the experience is showing that the markets are unable to offer safe alternative responses, and also that it is unable to regulate itself. That is why the Welfare State has continued to be preferred by citizens (not just by workers), to increase its budgetary weight and its presence in European societies, at the same time that still embryonic social policies are beginning to be implemented around the world. Moreover, the appeal to a “neo-interventionism” of the State in favour of the values of equality and human capital is already in the political agenda worldwide. The Welfare State has shown its effectiveness in several complicated situations, the last of which, the COVID-19 pandemic, is dramatic. And it is still the best instrument we have to respond to the traditional challenges and to the new ones that resulted from the crisis of the model of accumulation and growth introduced by the dominant and undisputed power of financial capital.

There are, however, new risks that require urgent responses, not yet found, that will probably compel the Welfare State to review its priorities and objectives.

The first is that of extreme poverty that still prevails in the world, in particular in sub-Saharan Africa and certain regions of Asia. Even though the world now can produce the goods and services necessary to satisfy all the basic needs of the world population, the truth is that there are societies in which hunger, malnutrition, scarcity of drinking water and infectious diseases decimate an important part of the population. This situation is related, as Picketti has shown, to the accumulation of wealth in a small minority, and to the gap of inequalities that increasingly separate the elites from the mass of humanity. What the Welfare State, or regional coalitions of States and world organizations, can do to reverse this trend, is a question to which an answer is urgent.

Some of the before mentioned risks, like water shortage and famines, are a direct result of climate change. In particular of global warming. The Welfare State will be strongly affected because an important part of the financial resources will be affected by the impact of the devastation of coastal zones in the Mediterranean and tropical and subtropical regions, and by the enormous costs of mitigating the effects of global warming on the adaptation of buildings, collective equipment and coastal defences. On the other hand, the reduction of carbon emissions may imply the acceptance of zero, or sometimes negative, growth in the economy, in an environment of ageing and consequent growth of expenditure. Finally, as the poorest regions of the world will be the most affected, it is expected that the immigration pressure in developed countries, and particularly in Europe, will intensify even further, generating tensions in the processes of social integration and support for immigrants. This intensification coincides with the demand for better policies to integrate people with disabilities; and to combat racial and gender discrimination. Thus, the Welfare State will be required to have imagination and new commitments.

Finally, the digitization and robotization of economies and society present challenges and resources that open great expectations. On the one hand, the substitution of low-skilled labour by machines will put great pressure on employment and training policies in the sense of finding alternatives for qualification or occupation for these workers, to avoid social exclusion and the degradation of their condition. The difficulties will be great and, therefore, the invested resources will be large. And they may not be sufficient. It may be necessary to invent new ways of empowering the “losers of globalization”, and new mechanisms for inclusion and promotion of their sense of social and economic utility. Leaving them out will be unworthy, unjust and dangerous; since they will be a pasture for populism. Perhaps these solutions are facilitated by the gains in productivity and intelligence that the robotization and digitalization of Welfare State administrative devices will produce. Technologies not only bring threats, they also bring opportunities.

One of these threats is that artificial intelligence develops in a sense that is rapidly moving from science fiction and the arts to reality, as it can be the case of Human Enhancement (Savulescu & Bostrom, 2009). This is, perhaps, the greatest challenge of all. The risk is to let an elite be created with superhuman powers and based on a productive infrastructure powered by computers and robots, which would be able to control the rest of humanity and use it for their personal benefit as slaves. An answer to this challenge implies an overdevelopment of the regulatory function by the State, in order to prevent social inequalities from becoming a problem of unequal distribution to a problem of irreversible constitutional inequality in human nature itself.

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