

# Family in societal redistribution: a theoretical inquiry

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## Abstract

**Purpose** – The family is one of the foundations of society; its significance for societal redistribution in modern societies, though, remains particularly unclear. A major reason for this is that theoretical approaches to societal redistribution have not adequately included family either in social philosophy or in welfare state theory. As a consequence, also empirical analyses of differences and developments in societal redistribution have not included family or only in as far as family is affected by other redistributive principles. This paper contributes to filling this theoretical gap.

**Design/methodology/approach** – This paper theorises family as a redistributive principle. With reference to the major theoretical concepts of redistribution, it identifies the relevant dimensions of family in societal redistribution and develops a typology of its inclusion in societal redistribution.

**Findings** – Approaches to redistribution are shaped by distinct concepts of equal or unequal exchange, the relevant actors they identify and by different understandings of the economy. These distinctions are central to understanding the position of family in societal redistribution. With reference to the major theoretical concepts of redistribution, this paper identifies the relevant dimensions of family in societal redistribution and develops a typology of its inclusion in societal redistribution. Further investigations might draw on this typology and detect the theoretical foundations of its conceptualisations and its similarities to and deviations from the developed types.

**Originality/value** – This paper provides a theoretical groundwork for theoretical and empirical investigations of societal redistribution and for better comprehending its international variation. It aims to initiate a fundamental rethinking of the usual understanding of societal redistribution that widely ignores family as a redistributive principle of its own.

**Keywords** Societal redistribution, Family as a redistributive principle, Family in societal redistribution, Social philosophy, Welfare state theory, Typology

**Paper type** Research paper

## 1. Introduction

The family is one of the foundations of society; its significance for societal redistribution in modern societies, though, remains particularly unclear. A major reason for this is that theoretical approaches to societal redistribution have not adequately included family either in social philosophy or in welfare state theory. As a consequence, also empirical analyses of differences and developments in societal redistribution have not included family or only in as far as family is affected by other redistributive principles. We know, however, that all societies with established welfare regulations apply family as a significant redistributive



principle in their regulations. Its analysis and measurement, though, has hardly been tried. Attempts to do so face empirical and methodological challenges; the major challenge, however, is the lack of an adequate theoretical approach to family in societal redistribution.

This paper contributes to filling this theoretical gap. It raises the question how the inclusion of family in societal redistribution can be adequately theorised. Societal redistribution is understood here as the legal framing of the redistribution of public means within a society. That is, neither the factual redistribution nor redistribution in the private domain are discussed here; instead, family is theorised as a redistributive principle within the regulations of societies. With reference to the major theoretical concepts of redistribution a typology of the inclusion of family in societal redistribution will be developed. This typology could in turn inform further theoretical and empirical investigations of societal redistribution.

The contribution is structured as follows. In the next part the inclusion and position of family in the most prominent theories and reflections on societal redistribution are explicated, first in social thought, then in welfare state theory and finally in approaches to welfare state differences. In the third part the central dimensions of societal redistribution in terms of family [1] will be identified by drawing on the foregoing theoretical arguments. Afterwards, a theoretical typology of the inclusion of family in societal redistribution will be developed based on these dimensions. The last part concludes this theoretical inquiry.

## 2. Theoretical concepts of redistribution and their inclusion of family

Theoretical reflection on societal redistribution has been at the centre of social thought and social and political philosophy since their very beginning. Here, I investigate how and in how far the family forms part of these reflections and is included in theoretical concepts of societal redistribution. Three groups of theories are differentiated to answer this, focussing first on social thought, second, on welfare state theory, and third, on approaches to welfare state differences with regard to societal redistribution. This theoretical analysis will be the foundation of a typology of the position of family in societal redistribution. Societal redistribution is defined here as the legal framing of the redistribution of public means within a society, consequently, the focus on family is on the legally acknowledged family. This legally acknowledged family varies internationally and historically, with probably the broadest definition in ancient Greece and Rome, and the narrowest in conservative welfare states of the 1970s. From some points of view this legal perspective might be interpreted as a weakness; for the purpose of this contribution, it is a logical choice: We are not interested here in family as a changing and perhaps controversial social phenomenon but in family as a redistributive principle within the regulations of societies (see also Footnote 3).

### 2.1 *Family in social thought on societal redistribution*

In social philosophy there is a lively debate over the “pros and cons” of societal redistribution. While in this discussion reference is made to a broad variety of arguments and concepts, they can be narrowed down to a few central ideas. There are the advocates of societal redistribution who invoke mainly the fulfilment of so-called natural purposes, efficiency and moral obligations. Those who argue against any form of societal redistribution primarily base this on the idea of natural imbalances and reject moral responsibilities. The moral argumentation, though, is the most common one in social thought. It goes back to antiquity when Aristotle (2002, 2017), drawing on Plato, identified two principles of distribution: equal exchange, which is free of morality, and unequal exchange, which should be applied to reward specific worthiness. Aristotle proposes to make it the law to combine these forms of exchange to generate a just distribution of goods: equal exchange in line with the logic of trade, and unequal exchange to support specific behaviour that benefits societal welfare.

These influential ideas are not just broadly voiced and discussed, but even partly advocated by those who in general refuse societal redistribution. [Hobbes \(1651\)](#) for instance, who refuses in general societal redistribution, nonetheless argues for unequal exchange to acknowledge socially desirable behaviour. Consequently, the concepts of equal and unequal exchange are placed here at the heart of the debate over redistribution in general, and redistribution in terms of the family in particular.

While the principle of unequal exchange refers to morality in terms of acknowledging a specific worthiness, there are other references to morality in social thought. A major one is the moral obligation to help the poor, in particular after poverty had been identified as a societal problem during the rise of capitalism (e.g. [Bentham, 1962](#); [Owen, 1817](#)). Some social philosophers of the eighteenth and nineteenth centuries opposed this idea, portraying the economy in analogy to nature and the market as led by the natural force of the “invisible hand” ([Smith, 1998\[1776\]](#), p. 593; also [Malthus, 1798](#)). They interpret state intervention and societal redistribution as unnecessary and potentially harmful to the self-regulating markets, and, further, exonerate the market from any moral obligations ([Hayek 1982\[1976\]](#)). Centrally influencing the discussion, [Malthus \(1798\)](#) developed a perspective on societies that interprets any intervention of the state in the societal order, including societal redistribution, as a threat to the natural balance and the adverse consequences of capitalism as a form of natural selection. In short, societal redistribution attacked what was identified as the core principle of the state in the seventeenth century: leaving the state of nature and granting secure living conditions to the population by enforcing property rights ([Hobbes, 1651](#)).

But what constitutes secure living conditions has always been contested. This is obvious upon considering the central argument in favour of societal redistribution, which is efficiency. Again, this argument can be traced back to antiquity. In his ideal polis, [Plato \(2004\)](#) calls for a distribution of goods that enables all persons to fulfil their natural purposes. [Aristotle \(2017\)](#) further develops this argument. The natural purposes he describes are directly linked to the organisation of the family. In his depiction, a family consists of masters and servants following the mutual aims of procreation and “the so-called art of getting wealth, which according to some is identical with household management” ([Aristotle, 2017](#), p. III). Different from [Plato \(2004\)](#), who argues that such purposes are naturally assigned by birth and vary independently of one’s gender [2], Aristotle links them to gender and servitude. However, they agree that only when everyone can fulfil their natural purposes might they in the best way possible contribute to society and to maximising societal wealth. This originally normative conceptualisation of contributing to society was later replaced by the narrower and economy-centred one of efficiency.

In the most controversial discussion on efficiency, the thinkers draw primarily on the concepts of natural purpose and natural balance. For Aristotle and Plato, imbalances appear (in form of an inefficient society) when individuals cannot fulfil their purpose. They interpret the natural purpose as part of a person’s essence and, consequently, societal redistribution as a societal necessity. Malthus instead argues that societies automatically reach a natural balance by natural selection; societal redistribution conflicts with this natural selection and is interpreted as endangering societal wealth. And while both concepts suggest a societal organisation aiming at societal wealth (or at maximising it, as utilitarians would say), they differ in their understanding of its precondition: the natural purpose of persons. This contrast is based on their particular concept of economy. When Smith or Malthus refer to the economy, they focus on the developing markets of early capitalism and their perfected forms as they imagined them. In other words, they equate economy and market. The economy, though, is not always interpreted as “the market”. Polanyi for instance distinguishes, in his famous concept of the “instituted economic process”, a “formal definition” of the economy (the market) and a “substantive” one (the economy) (Polanyi in [Cangiani, 2008](#), p. 30). By taking the market, the state, the family and voluntary exchanges of goods and services as different

economic modes and necessary component parts of a functioning economy, which he interprets as an instituted economic process where market and non-market resources are continuously and necessarily flowing, he conceptualises redistribution as a fundamental part of this circulation of resources (see [Frericks, 2010](#)). Different understandings of economy and societal wealth therefore lead to different perspectives on societal redistribution. A narrow or formal understanding of economy links redistribution to directly market-related conditions only. Here, other actors or activities are not considered relevant in the economic equation. Family is such an actor or activity. And the different concepts of economy – as either formal or essential – are at the heart of its inclusion, both theoretically and factually, in societal redistribution.

The above ideas about societal redistribution refer, mostly implicitly, also to the family. When state interference, for instance, is a threat to the natural balance of society, it is also harmful to the family that is conceptualised as a natural unit. A contrasting perspective emphasises the necessity to provide families with resources that help them fulfil their natural purpose. In the Republic, [Plato \(2004\)](#) identifies early education and childcare as the natural purposes of the family and proposes the institution of a specific group of nurturers as substitutes for the family. Later he rejects this idea as not viable, and reemphasises his perspective on the family as a necessary and indispensable unit of the social order that needs support by means of the redistribution of public goods, first as social services and later as financial redistribution ([Plato, 1988](#)). Here, Plato develops an original understanding of equal exchange: societies, as Plato puts it, first provide the necessary resources to a family to fulfil its purpose, and receive in return the fruits of the family's work, which is for him a contribution to societal wealth.

The above arguments and theories have been repeatedly discussed. Newer philosophical approaches to societal redistribution in terms of family mainly focus on the question of care and the (re)definition of work. In their famous debate, Nancy Fraser and Axel Honneth controversially discuss the need to “redistribute or recognise” familial care work ([Fraser and Honneth, 2003](#)). “Struggles over distribution” are thereby themselves “locked in . . . a struggle for recognition [and represent . . .] a conflict over the institutionalized hierarchy of values that govern which social groups, on the basis of their status and . . . esteem, have legitimate claim to a particular amount of material goods” ([Honneth, 2001](#), p. 54). The debate shows that questions of what to recognise as “socially necessary labour, abstracted, almost as a matter of course, from the fact that the raising of children or housework, for example, or other activities, also represent activities or social contributions . . . indispensable for the everyday reproduction of capitalist society” ([Honneth, 2001](#), p. 54) has neither theoretically nor empirically been conclusively answered, and neither has the question in how far to integrate it into societal redistribution by granting social entitlements based on it, i.e. by acknowledging it as a form of equal exchange.

To conclude on the theoretical foundations of family in societal redistribution, it can be stated that in social philosophy family is interpreted as a necessary provider of labour power and care-work. While some authors doubt whether redistribution to the family is necessary, or a threat to its natural balance, the societal position of the family as fundamental to creating wealth has never been questioned. Reflection on societal redistribution in terms of family, as in Plato, has however hardly been pursued, and the argument in favour of redistribution to families was initially mostly limited to that of poverty reduction.

## *2.2 Family in the theory of societal redistribution by welfare states*

Ever since welfare states started to develop, ideas about the reasons for and effects of societal redistribution have been addressed by welfare state theory, in which well-functioning societies is a basic concern, and various assumptions have been formulated about the nature

of welfare states. One is that societal redistribution needs to comply with the moral standards of a society and that the state, much better than the market, can allocate resources accordingly (Goodin *et al.*, 1999; Titmuss, 1974). Another assumption is that the redistribution of resources by the state corresponds to the population's expectations based on its historical culture (Esping-Andersen, 1990; Manow, 2004; Marshall, 1964, 1981a). A third basic assumption is that state regulation is indispensable where the market fails to allocate resources efficiently, particularly in addressing social risks (Barr, 1998[1987], 2001).

A major concern of welfare state theory is to explain the variation in societal redistribution in an international and historical comparison, and it does this by identifying differences in the redistributive principles on which regulations are built (Esping-Andersen, 1990; prominently Marshall, 1981a). These principles refer, in one way or another, to the concept of equal and unequal exchange. Social insurances of different kinds are, in general, understood as a form of equal exchange and quasi-property-right, since people financially contribute to social insurances before being entitled to resources paid out from them. Social assistance by contrast is conceptualised as a form of unequal exchange and depends on discretion. On this understanding of the reasons for different rights, it is often assumed that the resources for unequal redistribution are drawn from taxes, and the resources for equal exchange, from contributions. This, however, is not necessarily the case, and therefore a theoretical distinction has to be made (on seeming dichotomies see Frericks, 2007). The different social entitlements that explicitly [3] foresee redistribution in terms of family depend on a variety of conditions, among which are labour market participation, material need as identified in means-tests, and the type of family membership (Frericks *et al.*, 2023), and the concrete redistribution depends on the particular conditions that states formulate for access to, level and duration of social rights.

Different theoretical concepts of the welfare state have been developed. One of the central perspectives on the welfare state and its societal role identifies two main entities: labour (and the average production worker) and the state. The presupposition of this post-Marxist perspective is that the welfare state is a result of capitalism: it was established to mitigate the class conflict between labour and capital by instituting compulsory social insurances and social assistance programmes (Therborn, 1986; Esping-Andersen, 1990). The concept of freeing workers from selling their labour power to the market (decommodification) is central to this approach. It assumes the major forms of redistribution to be a more-or-less equal exchange based on a strong linkage of wage-based contributions and wage-based rights. It demands that employees and employers pay parts of the wage to the state to secure wage replacement in case of unemployment, illness or old age. Family, will be pointed out in detail below, is often conceptualised as an attachment to the status of the “average production worker”, and entitles him (sic) to some additional benefits.

While the post-Marxist perspective refers to the social group of workers, the individualist interpretation of the linkage between financial contributions and financial entitlements understands rights over resources as an individual life-course postponement of these resources either in terms of a “piggy bank” (Barr, 2001) or as “deferred wage” (Friot, 2004) [4]. Both approaches postulate a kind of property right held by the individual or worker as a result of an equal exchange based on financial contributions, and both refuse redistribution that is not related to labour market participation. Other forms of societal redistribution, in terms of poverty prevention or family support, are conceptualised as forms of unequal exchange. The former, i.e. poverty prevention, is not completely rejected in welfare state theory (Esping-Andersen *et al.*, 2002); family-related rights, though, are more and more interpreted as outdated and in many social policy reforms have indeed been reduced (see Frericks, 2012).

Poverty prevention, a major issue of welfare state theory, is thus broadly accepted in this theoretical strand, on the classical argument that losing one's income or labour is often not an

individual failure but a social risk (Marshall, 1964; Titmuss, 1974). Entitlements to poverty-preventing resources though have been theorised and institutionalised as social rights of second order that depend on discretion and public discourse. Since poverty prevention has always been interpreted as an unequal exchange, its level and conditions are subject to a continuous debate on “deservingness” (Laenen, 2020), or, as Marshall (1981b) put it, people have the right to be poor. Redistribution to the poor, in other words, greatly depends on the good will of society, its perspective on the reasons for being poor and its definition of an economic unit (when resources of the family are calculated in); it is by no means comparable to a quasi-property-right.

The wage-centred approach to societal redistribution has been contested by other viewpoints, first and foremost feminist ones. Feminists point out that societal redistribution implies or includes family membership. Historically, workers’ rights were often linked to a specific male-breadwinner model, where social entitlements were also granted to wives and children as derived rights (Lewis, 1992). And indeed, the wage of the male breadwinner was set up as a “family wage” (Land, 1980): a male industrial worker’s wage was intended to feed a whole family. Consequently, schemes to replace this wage in case of need, for instance provoked by unemployment, were institutionalised so as to maintain the whole family (Fraser, 1994). Where wages dropped below the level of a “family wage”, social entitlements like family allowances (cash transfers) or tax allowances were devised as possible solutions (Land, 1980). Since the genderedness of labour market participation has decreased in the past decades, it has been argued that the male-breadwinner model is on its way to being replaced by a dual-earner model with individual social entitlements from paid work (Lewis and Giullari, 2005). Empirical research, though, contradicts this interpretation since family-based rights do not only remain in most welfare states but have also been newly introduced or strengthened (see below). Conceptually, this is based on two interpretations of family. First, family is seen as an economic unit, both in good times and bad, and second, family (care) work has increasingly been acknowledged and concretised by instituting family work as a reason for social entitlements (for details, see Frericks, 2022).

The presented arguments show that approaches to redistribution in welfare state theory are shaped by distinct concepts of societal redistribution in terms of equal or unequal exchange, the relevant actors they identify and by different understandings of the economy. This is crucial in theorising societal redistribution to family since its interpretation as equal or unequal exchange depends on the interpretation of economic processes and is linked to the financing of redistribution. While most welfare state concepts focus on the interplay of state and market, Polanyi (2001[1944]), as pointed out above, interprets economies as socially embedded and societal welfare as based on the interplay of different economic modes, including the family (Folbre, 2006; Frericks and Maier, 2012). Consequently, he explicitly includes family as a relevant actor in societal redistribution and theorises it both as a recipient and as a contributor in an equal exchange. This approach, however, is hardly cited.

Family as a “blind spot” in most welfare state theory and literature has been criticised by feminist authors in particular (e.g. Fraser, 1994; Orloff, 1993), and various attempts (e.g. Albertini *et al.*, 2009; Esping-Andersen, 1999; Kohli, 1999; Leitner, 2003) to grasp the specific position and meaning of family in societal redistribution have delivered only partial insights. Nonetheless, there is still much space for clarification since most attempts to understand the specific position and meaning of family in societal redistribution rely either on a more-or-less post-Marxist perspective and narrow down the role of the welfare state to mitigating class conflict by decommodification, or on another still labour-market and income-centred concept of societies, as criticised in detail by Diane Sainsbury (1996). This focus has not just blurred the meaning of the family in society; the provision of education and child- and elder-care by the family (and others) has been reduced in its societal meaning; it is interpreted as an obstacle to employment and full labour market integration, leading to insufficient



wages of women for the support of their children, and as a “burden” that women need to be “freed” from (Esping-Andersen, 1999).

In short, family is broadly discussed but only marginally included in welfare state theory on societal redistribution. And although family has been identified as a blind spot in welfare state theory and analyses of societal redistribution, the position of the family and its relevance in societal redistribution has never been sufficiently identified and conceptualised. The important, helpful and intense debate about “recognition or redistribution” has not yet resulted in adequate concepts of societal redistribution in terms of family.

### *2.3 The family with regard to societal redistribution in different welfare states*

As welfare state theory has advanced, a comparative perspective on the welfare state has developed as a major field of research. Researchers soon realised that analysing welfare state spending was inadequate for elaborating on welfare state differences and analyses of the specific characteristics of welfare states followed (Esping-Andersen, 1990). Differences were detected: some states employ means-tests to prove need, others grant social entitlements universally, and still others mainly apply contribution-based social insurance benefits (Esping-Andersen, 1990; Goodin *et al.*, 1999). Further, it was stated that welfare states had purposely introduced a particular organisation and level of social entitlements (conceptualised as degrees of decommodification) that resulted in particular forms of societal redistribution (conceptualised as stratification). These “worlds of welfare capitalism”, first three, later widened to further types, are mostly confirmed or accepted by the research community. This holds true even for research on welfare state differences with regard to family and gender, thus areas that are theoretically not sufficiently covered by the concept of decommodification as this contribution argues. But as Mary Daly sums up: “The general consensus in the field on the basis of the gender-oriented typologizing is that the countries of the EU cohere into five main groupings in terms of their family/gender model” (Daly, 2020, p. 40).

Consequently, the gender and care arrangements of societies are insufficiently reflected in most welfare state analyses, including their institutionalised gender orders, the societal division of unpaid care-work and paid labour in particular (Pfau-Effinger, 1998), and the regulation of formal and informal care-work (Pfau-Effinger, 2005). Also, family is hardly covered. To study in how far societal redistribution makes individuals financially independent from the family, enabling them to enjoy a “socially acceptable standard of living” (Lister, 1994) or “well-being” (McLaughlin and Glendinning, 1994), the concept of (de)familialisation was introduced. Defamilialisation studies focus either on redistributive mechanisms allowing women’s relative independence from family resources even when they must care for family (e.g. Bamba, 2004), or they analyse “the degree to which social policy frees women from the burden of family obligations, [and] the extent to which motherhood is compatible with careers” (Esping-Andersen, 1999, pp. 88, 178; also Korpi, 2000). Thus, the latter and dominant focus of the defamilialisation concept differentiates between welfare states that “free women from the burden of family obligations” and those that do not (Esping-Andersen, 1999, p. 51). This understanding of defamilialisation is strictly linked to the concept of (de)commodification and therefore fails to strengthen the theoretical perspective and empirical investigation of family in societal redistribution. As Esping-Andersen explains, “via the de-familialization of welfare responsibilities, the social democratic welfare state helps commodify women (and so lessens the dependence on males) so that it can then de-commodify them” (1999, p. 46). Thus, the commodification of women’s labour is, to him, a prerequisite for their defamilialisation and vice versa [5]. Since welfare state theory assumes that the level of defamilialisation corresponds to the level of decommodification, the

differentiation of welfare regimes has indeed been confirmed by defamilialisation studies (Lohmann and Zagel, 2016). There is though also welfare state research that identifies differences that do not correspond to the welfare regimes, such as Saraceno and Keck's (2010) study of intergenerational redistribution in welfare states, and the study by Frericks *et al.* (2016) on the degree of individualisation of social rights. Comparative welfare state analysis that draws on other than the established work-related concepts results in country differentiations that in part strongly differ from the established regime types.

One of the perspectives that extends the scope of analytical dimensions in welfare state analysis by integrating the position of family into the theory of societal redistribution elaborates on a distinction between individual vs family-based rights (Daly and Scheiwe, 2010). This distinction has usually been linked to the breadwinner model and its institutionalised gender order. Where the male-breadwinner model persists and the family receives resources from the welfare state, social entitlements are described as family-based; where it has been overcome, social entitlements are described as individualised (Lewis and Giullari, 2005). Thus, depending on the countries' development towards the dual-earner model, do family-related rights disappear. Empirical analyses of welfare state differences have shown however that this interpretation does not correspond to factual welfare state differences and developments (Pfau-Effinger, 2004; Frericks *et al.*, 2016). Most welfare states do consist of both – social entitlements based on the individual, and those based on family membership. Therefore, identifying fundamental redistributive differences between countries as based on individual *or* family-based rights limits the analysis of factual welfare state characteristics.

Another fruitful concept in comparative welfare state analysis in terms of family is subsidiarity. It follows a logic of requesting resources from the “lower” institutional level, here the family. In the tradition of regarding the family as a natural or economic unit, solidarity – also financial – is requested from family members. The request of financial solidarity is still most explicitly institutionalised in means-tests, which calculate social entitlements based on the income and assets of family members, thus treating family as a unit of measurement (Daly and Scheiwe, 2010; Goodin *et al.*, 1999). How the logics differ between including family members in terms of care needs and financial needs has been nicely analysed by Chiara Saraceno (2016).

To sum up, family has been discussed in the various analyses of welfare state differences, but in terms of societal redistribution it has never been adequately theorised. Nonetheless, this literature delivers theoretical foundations for a suitable framework for analysing the position of family in societal redistribution. The classical regime approach draws mainly on the commodified worker, or tries to explain why some citizens are not (fully) commodified. Here, family is only implicitly part of the analysis of welfare state differences, as a unit that is more or less relevant in, for example, tax regulations, means-tests or derived rights. A systematic analysis of family in welfare state redistribution, though, has hardly been tried (for first attempts – from different angles – see Frericks, 2022; Frericks and Gurín, 2023; Frericks and Höppner, 2019; Frericks *et al.*, 2023). The following section develops a theoretical typology of societal redistribution in terms of family.

### 3. Typology

Drawing on the above literature we can distinguish four dimensions relevant to distinguishing types of family inclusion in societal redistribution. These are the conditionality of social redistribution in terms of family, based on the concept of equal or unequal exchange, the unit that societal redistribution is related to, the financing of societal redistribution and the level of social entitlements. While the arguments surrounding these dimensions in part overlap, the dimensions are theoretically independent of each other.



### 3.1 Dimensions

Societal redistribution is, in social philosophy and welfare state theory, linked to different kinds of *conditionality*. The various perspectives on redistribution are thereby based, though rather implicitly, on the concept of equal or unequal exchange. *Full* inclusion in societal redistribution is linked to rights interpreted as quasi-property-rights. Consequently, I identify equal exchange as the main or basic legitimation of social entitlements and as the first dimension of relevance for distinguishing the types of family inclusion in societal redistribution. We can distinguish two central perspectives on equal exchange that build on distinct definitions of economy. On the one hand, there is the idea that societal redistribution is a more or less equal exchange of paid contributions and social entitlements. Here, other societal resources – except the (labour) market – such as the family, are more or less excluded or ignored. On the other hand, there is an interpretation of equal exchange that criticises this “formal” understanding of economy and applies a “substantive” definition, as put forward by Polanyi. There are also contemporary economists, in addition to various (in part feminist) theorists, who emphasise the dependency of societal wealth and development on two different kinds of resources: “human and capital investments”, resp. “real” and “financial” contributions to society (Sinn, 2000). Both of these necessary forms of contribution to society consequently need to be in the societal equation and its set-up of social redistribution. In these latter concepts, both human and real contributions, or paid and unpaid labour (mostly provided by the family), are interpreted as entitling a person to resources in societal redistribution as part of an equal exchange. And in fact, in all European welfare states (albeit to different degrees), family is interpreted as a societal resource that legitimates entitlements to resources in societal redistribution (Frericks *et al.*, 2023). The theoretical interpretations of equal exchange are thus contradictory, resulting in very different understandings of contributions that define and constitute solidary communities and societal redistribution.

The second dimension relevant to distinguishing the types of family inclusion in societal redistribution is the *unit* that societal redistribution is related to. This might be, on the one hand, the family, either as the beneficiary of entitlements, as is markedly the case in systems with derived rights, or in terms of (financial) responsibility among members before one of them can be entitled to public means. The latter includes family in societal redistribution as the unit of measurement for means-tested social entitlements. On the other hand, societal redistribution might be exclusively linked to the individual, either in terms of calculating entitlements (based on direct financial contributions and not containing any family-related entitlements) or obligations (family and family resources are not included in poverty-preventing redistribution to individuals – or, in terms of care need – as a source of private care). Here, Scandinavian countries are known to draw more on the individual while so-called conservative, middle-European countries draw much more on the family as an economic unit.

The third dimension in distinguishing types of family inclusion in societal redistribution is its *financing*. There are two distinct ways to finance societal redistribution: one is taxes, and the other, contributions. And while redistribution based on contributory payments is mostly interpreted as a kind of deferred wage which is paid into the public purse to be paid out again in times of unemployment, illness or old age, tax-based redistribution is mainly interpreted as a general source of redistribution to the poor. This distinction is misleading, both in theoretical and empirical terms, since it depends on the country’s institutionalisation of redistribution, and in how far it follows this logic. There are two major societal redistributions that contradict this distinction. One is, that countries may redistribute taxes to the entire population, not only to the poor; most prominently in general are social systems such as public healthcare in the UK or Italy, or old-age pensions, so-called people’s pensions, in countries like the Netherlands or Denmark. The second is when taxes are used to co-finance contribution-based schemes to cover both general deficits in these schemes and periods of

non-contribution or restricted payments (e.g. caused by unemployment, further education, sickness or care-related work interruptions). In Germany for instance, where of course also reunification costs factor in, the subsidy to the contribution-based pension system from taxes amounted to 25% of the pension system budget in 2022 (BMAS, 2023). Thus, societal redistribution, both including and not including the family, can be (and is) financed by taxes, contributions and a mix of both. Whether tax-based or contribution-based entitlements are more secure (in terms of quasi-property-rights) now and in the future, is debated currently in light of the global trend of investing social contributions on financial markets but traditionally also in terms of discretion. If the distinction between forms of financing translates into different kinds of rights, that is, classically speaking, if tax-based entitlements are less guaranteed in terms of quasi-property-criteria than contribution-based entitlements, then this dimension is relevant to distinguishing the types of inclusion of family in societal redistribution. Family inclusion in contribution-based redistribution, in other words, may thus result in a better quality of entitlements than it does in redistribution based on taxes.

Finally, a dimension relevant in the inclusion of family in societal redistribution is the *level of social entitlements*. Generally, one can distinguish two levels: poverty prevention and maintenance of living standards (Frericks, 2013, drawing on Marshall, 1964). Also in terms of family can these structurally different levels be distinguished; that is, family might be included in societal redistribution when it's at risk of poverty, or in the calculation of contributions it needs to maintain a certain living standard. This distinction is particularly clear in pension credits for familial care supply that in part add up to pension rights gained from employment, or replace them (depending on the country and type of family-provided care, e.g. children or frail relatives), and in part help to reach only poverty-preventing pensions (see Frericks, 2022). Logically linking these levels to their financing as tax-based or contribution-based, as is often done, is again neither theoretically nor empirically sound (see Table 1).

### 3.2 Types

Using the dimensions of inclusion of family in societal redistribution drawn from the major theories on societal redistribution, five theoretical types of family inclusion in societal redistribution will now be developed as graduated positions of family in societal redistribution. It is true that one could develop many more theoretical types from four dichotomous dimensions; however, as we will see, a *graduation* of the position of family in societal redistribution makes most sense when we reduce and logically combine the “attributes in a multidimensional space” (Lazarsfeld, 1937). Consequently, five theoretical types are distinguished as graduations of the position of family in societal redistribution: (1) family is absent in societal redistribution; (2) family is marginally included in societal redistribution in poverty-preventing systems; (3) family is included on a medium level on the assumption that it is a financial burden on the breadwinner or a handicap to labour market participation; (4) family is included on a high level by interpreting it as contributing to society and as an economic mode; and (5), family is included in societal redistribution as a source of

Dimensions	Central theoretical perspectives	
Equal exchange	Based on financial means only	Based on societal resources
Unit	The family	The individual
Financing	Taxes	Contributions
Level	Poverty prevention	Maintaining living standards

**Source(s):** Authors own creation

**Table 1.**  
Dimensions and  
theoretical  
perspectives on types  
of family inclusion in  
societal redistribution

(financial) resources, only in order to avoid or reduce redistributive costs. The types are theoretically pure in the Weberian sense (Weber, 1978[1968]), and concrete social orders combine them. This means – reflecting upon these types with reference to the above dimensions – an analytic instrument has been developed here for the inclusion of family in societal redistribution which might inform theoretical and empirical investigations of existing systems of societal redistribution by detecting their similarities to and deviations from these types (Frericks, 2021).

The first type is grounded in the idea that societal redistribution is based on an equal exchange of contributory payments and social entitlements. Employment- or market-centred conceptualisations of redistribution interpret entitlements as resulting from financial contributions or investments. Family, as a so-called private concern (Arendt, 2013[1958]), is absent here in public societal redistribution. The unit of societal redistribution is the individual; the financing of the entitlements is contribution-based and meant to maintain a living standard. Families that actually rely on redistribution can only pool their resources privately; society's neglect of family in redistribution has been called "[implicit] familism by default" (Saraceno, 2012). In this type, family is neither granted entitlements nor legally obliged to support relatives. It has been shown that this type does not apply to societal redistribution as legally regulated, but at most to private insurances (Frericks, 2022).

The second type relies on the idea that societal redistribution in terms of family is only necessary if the family is at risk of poverty. Consequently, this type is based on the concept of unequal exchange. Its unit, in terms of poverty prevention, is the family, and the means used to finance this societal redistribution is taxes. Originally, this was the basic conceptualisation of family in social redistribution in the UK. Nowadays income-dependent tax credits emphasise labour market participation rather than poverty prevention, and in terms of conditionality and level, they relate to the following type three.

In the third type, family is included at a medium level of societal redistribution and considered to be a financial burden on the breadwinner or handicap to labour market participation. Whether entitlements are financed by contributions or taxes depends on the society's attitude towards resources and solidarity communities. And whether the unit is the individual or the family depends on the interpretation of family as either dependent on the breadwinner or a handicap to the individual's labour market participation. Different from type two, this includes redistribution on a higher level than poverty prevention, since it interprets the handicap to labour market participation as a precondition to fulfilling what is interpreted as the natural tasks of the family, and so deserves societal support.

The fourth type includes family in societal redistribution on a high level, on the understanding of family as a contribution to society and, explicitly or implicitly, as an economic mode. So-called human contributions are at the same level as financial contributions, and family-based rights are quasi-property-rights, as are labour market-based rights. The inclusion of family in societal redistribution is *full*, also in terms of the level which is intended to maintain the living standard. Interestingly, and as Frericks (2010) elaborates, the unit of societal redistribution in this type is the individual, while the reason for entitlements is the family. And resulting logically from the conceptualisation of this type as an equal exchange, in terms of a contribution to society and entitlement from society, the financing of family-based entitlements in this type is from taxes (a detailed discussion on the financing in Frericks and Maier, 2011). This type dominates in current pension care credits in Germany for children (though not for pension care credits for family care of frail relatives), or formerly in the "peoples pension" logic of many European countries.

Finally, the fifth type includes family in societal redistribution as a source of finance in order to avoid or reduce redistributive costs. The principle that this type refers to is subsidiarity. The family, as the "lower" institutional level, is legally obliged to provide resources to family members in need before societal resources are provided. Family, here

interpreted as a natural unit that pools its income and/or assets, is included in societal redistribution as a source of funds so that taxes and contributions do not have to be used. The level at stake is poverty prevention (Table 2).

The typology shows that family might be included very differently in societal redistribution, and exactly how it is, depends on the interpretation of the family and the economy. The inclusion thus applies the relevant dimensions differently, but not systematically. These theoretical types with reference to the above dimensions serve as an analytic instrument for the inclusion of family in societal redistribution. The concrete social orders may also combine them, also because of time-shifted reforms of the various social policies (Pfau-Effinger, 2005). The theoretical and empirical investigation of social orders in terms of their inclusion of family in societal redistribution, and the analysis of political struggles in terms of redistribution, though, might draw on this typology and detect the theoretical foundations of their conceptualisations and their similarities to and deviations from the five ideal types.

#### 4. Conclusion

In social thought and welfare state theory, the principles of societal redistribution are continuously debated. And while the family is one of the foundations of society, its inclusion in societal redistribution has never been at the centre of this debate; its exact position remains, up to today, particularly unclear. In fact, theoretical approaches to societal redistribution have not adequately included family. As a consequence, also empirical analyses of differences and developments in societal redistribution have either not included family or only as affected by other redistributive principles. We know, however, that all societies with established welfare regulations apply family as a significant redistributive principle in those regulations. Its analysis and measurement, though, has hardly been tried. First attempts to do so have faced various profound challenges, among which are empirical and methodological ones; the theoretical one, however, has been tackled by this contribution: the lack of an adequate theoretical approach to family in societal redistribution.

The question has been raised here of how family can be adequately theorised in terms of societal redistribution, and it has been answered by developing a typology distinguishing theoretical types of inclusion of family in societal redistribution, first by identifying family in the various existing theories on societal redistribution, drawing successively on social thought, welfare state theory and approaches to welfare state differences. This theoretical analysis served to identify the relevant dimensions of societal redistribution and the inclusion of family in it. These comprise the interpretation of societal redistribution as equal or unequal exchange, the unit referred to, the financing of societal redistribution and the level of

Type	Type characteristics	Empirical example
1	Family is absent in societal redistribution	Nowhere to be observed
2	Family is included only when at risk of poverty	Former UK
3	Family is included on a medium redistributive level if a financial burden on the breadwinner or a handicap to labour market participation is attributed to it	UK at present
4	Family is included in societal redistribution on a high level on the understanding of it as a fundamental contribution to society	German child-care pension credits
5	Family is included in societal redistribution as a source of funding in order to avoid societal redistribution costs	Means-tested benefits

**Source(s):** Authors own creation

**Table 2.**  
Types of family  
inclusion in societal  
redistribution

redistribution. On these dimensions the typology of five types of family inclusion in societal redistribution has been developed. These types are theoretically pure in the Weberian sense; concrete social orders might (and do) combine them, and examples for that have been provided. The pure types are: (1) family is absent in societal redistribution; (2) family is included only when at risk of poverty; (3) family is included on a medium redistributive level if a financial burden on the breadwinner or a handicap to labour market participation is attributed to it; (4) family is included in societal redistribution on a high level on the understanding of it as a fundamental contribution to society; and (5), family is included in societal redistribution as a source of funding in order to avoid redistributive costs. Each type has specific substantiations in terms of the identified dimensions. With this theoretical undertaking the author aimed to provide a theoretical groundwork for theoretical and empirical investigations and initiate a fundamental rethinking of the usual understanding of societal redistribution that widely ignores family as a redistributive principle of its own.

New theorising of course can suffer from serious limitations, and here are two in particular. The first, already briefly discussed, is the definition of the family. When we aim to understand the position of family in societal redistribution (preferably from an international perspective), sticking to the official and legal definition is logically necessary. Nonetheless, this shows us of course only part of the story. In certain countries the position of non-recognised families needs to be identified by indirect means: socio-economic data, probably from non-official data collection, must be used to identify non-recognised families whose resources need to be contrasted with redistribution towards recognised families. Only when analysing societal redistribution in terms of family that is defined theoretically do we get the whole picture.

The second limitation is the challenge to adequately theorise and then empirically include different family forms in the analysis. It is simply not accurate to say that welfare states differ in how they position “the family” in societal redistribution; they actually differ in how they treat different family forms. And their *redistributive logics* in terms of families, i.e. the lines of inequalities as set down in their redistributive regulations, need to be grasped by analysing very different family forms (Frericks and Gurin, 2023; Frericks *et al.*, 2023). But how to adequately integrate these differences into this theoretical approach is still a puzzle to this author. In short, there is still much to do to reconcile social theory and the family.

## Notes

1. The author wittingly refrain from the more common formulation of redistribution *towards* family since societal redistribution includes regulations that legally oblige the family to provide resources to other family members before these are entitled to public support (Frericks *et al.*, 2023). Redistribution *in terms of* family includes both the granting and requesting of resources. Only where clearly referring to redistribution *towards* family, might the author sometimes use this term.
2. In his Republic, Plato (2004, p. 143) divides men and women only as to their ability to give birth or impregnate: “In the case of both the male and the female sex, then, if one of them is shown to be different from the other with regard to a particular craft or pursuit, we will say that is the one who should be assigned to it. But if it is apparent that they differ in this respect alone, that the female bears the offspring while the male mounts the female, we will say it has not yet been demonstrated that a woman is different from a man with regard to what we are talking about, and we will continue to believe our guardians and their women should have the same pursuits”.
3. Implicitly, all rights over resources have an impact on redistribution in terms of family. The author focuses here on explicitly formulated regulations on redistribution in terms of family though (on the distinction, see Kamerman and Kahn, 1976). That is, the author focuses on the state’s instituted redistribution that logically restricts itself to family forms that may be addressed by the regulations. On the dynamics of citizenship identity, see Maier (2007), for country comparison of family norms and identity formation, see Naldini and Long (2017).

4. This approach, dominating debates after the neo-liberal turn around the new millennium, refrains from emphasising social groups or solidarity communities (see [Frericks, 2013](#)).
5. Esping-Andersen's argument about 'freeing' women from family obligations, though, explicitly justifies gender-discriminating wages and labour markets. Furthermore, it explicitly aims at the prevention of future child poverty, not at the degendering of rights or resources ([Esping-Andersen et al., 2002](#)).

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