

ROLE OF THE WELFARE STATES IN TACKLING SOCIAL INEQUALITIES: A REVIEW OF CRITIQUES, JUSTIFICATIONS AND EVIDENCE FROM THE LITERATURE

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Abstract

This research paper examines the nature of the welfare state as an instrument of redistributive justice. Critiques of the welfare state are explored, followed by an analysis of justifications for its existence. Evidence from the past decades is examined in the context of social justice, with a focus on social inequalities. The paper concludes with several key findings: firstly, welfare states have played a significant role in reducing poverty in the past. However, there is evidence to suggest that the impact on inequality has been largely negative. Additionally, the welfare state has not functioned as an effective means of achieving redistributive justice. Finally, the paper argues that in the present situation, we need to develop solutions that go beyond the welfare state to effectively address social inequalities. Overall, this paper contributes to the ongoing debate on the role of the welfare state in promoting redistributive justice and highlights the need for innovative approaches to address social inequalities.

Key words: Welfare State, Redistributive Justice, Social Justice, Social Inequalities

Introduction

As we head into the third decade of the 21st century, inequalities across globe and within countries continue to rise (Piketty, 2014; 2019). In turn, this has brought the question of redistributive justice to the fore. More pertinently, there is now a growing recognition that social inequalities can lead to destabilization and a turn towards radical approaches, as exemplified by the rise of populist forces worldwide (Franko and Witko, 2017). One potential solution to this challenge is the welfare state. Originally conceived and implemented in the nineteenth century, the welfare state became the dominant response to inequality in the middle of the twentieth century. The Great Depression and the destruction wrought by the Second World War led to a global consensus that some level of welfare was necessary both politically and economically (Harvey, 2005). Currently, for instance, the welfare spending in Europe takes up almost a third of the total GDP on average and majority of the overall government spending (Vanhuysse et al., 2021). Additionally, welfare provision is recognized and encoded as a right in multiple countries outside of Europe such as India and Pakistan.

In this work we will delve into the key critiques directed at welfare states, ranging from concerns about dependency and disincentives to work, to questions about the sustainability of such systems in an ever-changing economic landscape. Conversely, the justifications for welfare states, grounded in principles of social justice, economic stability, and collective well-being, will also be explored in detail. The paper will then proceed to present empirical evidence from a diverse range of studies. By critically analysing the existing body of literature, this research paper seeks to contribute to ongoing discussions about the efficacy and relevance of welfare states in contemporary societies. Through a balanced evaluation of the strengths and limitations of these systems, policymakers and stakeholders can better understand how to harness their potential while addressing the challenges that lie ahead.



Research design

This study adopts a systematic literature review approach to synthesize and analyse existing knowledge on the role of welfare states in mitigating social inequalities. The research design includes the following key elements:

i. Research objectives

The primary objective of the study is to comprehensively review and analyse critiques, justifications, and empirical evidence related to the role of welfare states in addressing social inequalities.

ii. Data collection

Secondary data collection involves gathering scholarly articles, books, reports, and other relevant sources from reputable academic databases. The search terms include variations of "welfare states," "social inequalities," "critiques," "justifications," and "evidence." The collected sources undergo a two-stage screening process. In the initial stage, titles and abstracts are screened for relevance to the research topic. In the second stage, full-text articles are assessed.

iii. Data analysis

The data analysis process comprises the following steps:

- **Data extraction:** Relevant information from the selected sources is systematically extracted, including key arguments, critiques, justifications, empirical findings, methodologies, and theoretical frameworks.
- **Content categorization:** The extracted data is categorized into themes, including critiques of welfare state interventions, justifications for their effectiveness, and empirical evidence of their impact on social inequalities. Subthemes related to different dimensions of social inequalities, such as income, ethnicity, race, and gender, are also identified.
- **Synthesis and comparison:** The categorized data is synthesized to identify patterns, similarities, and differences across critiques, justifications, and empirical evidence. Comparative analysis is conducted to assess the strengths and weaknesses of different arguments and to determine areas of consensus or disagreement within the literature.

iv. Ethical considerations

The research adheres to ethical standards by properly attributing sources, avoiding plagiarism, and respecting intellectual property rights.

v. Limitations

The study acknowledges potential limitations, such as biases in source selection, language limitations, missing local context, and the possibility of missing recent developments beyond the knowledge cutoff date.

Critiques of the welfare state

i. An underappreciated model of individual liberty

The foremost critique of the welfare state is linked to its conception of 'justice' and 'liberty', which in a well-functioning society runs into a central conundrum: efforts towards increased 'justice' can lead to curtailment of liberty (Vallier, 2021). This is the argument that thinkers like Friedrich Hayek present against the welfare state. According to this school of thought, the welfare state is built on two ideas which are 1) that an arbitrary allocation of resources, instead of market forces, can lead to better outcomes for all and 2) collectivization will produce the desired welfare effects (Hayek, 1944; 1960). The practice of both these ideas significantly impinges on individual liberty (Alves and Guizzo, 2023). For instance, Hayek notes that the abstract idea of 'justice' that a welfare state presumes to fulfil is based on arbitrariness and gathering of allocative power by a central planning authority. Hayek argues that there are no objective criteria for a 'just' society that can effectively address the inequalities prevalent in a society. Instead, a welfare state functions on arbitrary designation of what is a 'just' distribution of resources, which 1) do not account for the various complexities inherent in the societal make up and 2) block market forces from efficiently allocating resources. Second, this arbitrariness is encoded and legalized by the State which in this process accumulates coercive power for itself, along with the right to heavily tax its population. This directly leads to direct coercion, a situation directly opposite to a liberal and free society (Hayek, 1944; 1960).



ii. The welfare state and the economic system

A second line of critique of the welfare state is directly tied to its material effect on the economy. For instance, Friedman (1980) argues that the welfare state, and all its assorted institutions, directly lead to a waste of resources. This process occurs via two routes. First, the welfare state leads to a bloated bureaucratic set-up which consumes most of the resources designated for welfare. This is evident in the amount of spending done just to keep the welfare bureaucracy going in various countries. At the same time, it also skews governmental incentives in such a way that this bureaucratic set-up becomes a self-perpetuating institution that continues to consume resources for the near future. Second, the primary beneficiaries of the welfare state are not its major payers. In theory, this seems coherent with the goal of redistributive justice whereby people with wealth should contribute to the welfare of the less privileged. In practice, this leads to complications. For instance, as evidence from the first three decades of post-World War II welfare systems emerged, it became clear that the transfer of wealth was not from the rich to the poor. Instead, this transfer was from the working young to retired old, whereby the old are essentially levying a tax on the young to fund their own retirement. Friedman (1980) suggests that this current state of affairs will be hard to transform but it is essentially a generational tax that cannot continue indefinitely.

iii. Welfare spending and inflation

The third major critique offered by this school of thought is rooted in economic theory. As the welfare expenditure continues to rise in a country, it inevitably effects the overall spending pattern of the economy. The biggest fear here is the increasing inflation triggered because of (or in conjunction with) burgeoning welfare spending. As welfare spending expands in a country, it inevitably leads to a situation of high inflation. This situation emerged in the 1970s financial crisis as welfare states across the globe finally ran into problems, which led to a new set of austerity measures in the 1980s (Kus, 2006).

iv. Working population burdened by the non-working population

Moreover, as per this critique, the welfare state succeeds in redistribution of wealth from one group to the other, but the primary beneficiaries of this redistribution are not the poor or the neediest but the middle-class (Friedman, 1962). One additional roadblock towards utilizing the welfare state as redistributive justice is that it heavily taxes the working population to fund itself. By doing this, the welfare state effectively skews the incentive to work as majority of the further income earned would be taken away in taxes. Thus, it leads to a situation where the working segment are forced to shoulder the burden for the non-working population.

v. A new paradigm for social regulation

Another line of critique emerges from a different tradition. Best exemplified by thinkers such as Freire (1968), this school of thought argues that the State focuses on “changing the consciousness of the oppressed, not the situation which oppresses them.” The welfare state emerges in this critique not as a benign institutional arrangement but instead as a ‘paternalistic social action apparatus’. In this apparatus, the people in need of assistance are treated as marginal persons who deviate from the otherwise ‘normal’ functioning of society and should thus be categorized as ‘welfare recipients’. Here, instead of being an empowering collective action, the welfare state becomes a tool for social regulation wherein those on the margins are treated less as members of the society and more as pathologies that must be treated. Simultaneously, welfare states involve an extensive process of documentation of citizens which not only makes them directly dependent on the State, but also raise questions of privacy and surveillance.

vi. Gender in the welfare state

Another key component of any attempt to challenge social inequalities will inevitably be gender. Here, we find another set of critiques against the welfare state as an instrument of redistributive justice. First, this school of thought argues that originally the welfare state policies were explicitly designed with a patriarchal family unit in mind. In this unit, a man is the primary breadwinner, and the woman is responsible for all housework. This inevitably leads to an unequal on the distribution of incomes (Khan & Yawar, 2020; Wilson, 1977). Second, as the designated primary caregiver, the responsibility for taking care of the elderly, ill, and the children falls squarely on women, without



adequate compensation. This, in fact, leads to a situation where the welfare state does not address the gender inequalities emergent in society. Third, the limited presence of women and other gender minorities in welfare policy making processes has an adverse effect on these groups. The welfare state by itself fails to fully incorporate the specific needs of women and other gender minorities, particularly those related to health and nutrition (Dale & Foster, 1986).

vii. Race and welfare

Finally, evidence from welfare policies across the Western world seems to suggest that the welfare state is not necessarily an equality-oriented system. The welfare state tends to address exclusively the concerns of the groups in power (whether ethnic, linguistic, or class). As Ward (2005) shows, the welfare system can often be directly discriminatory on basis of race, whereby those on the margins (such as racial minorities) are often left behind or excluded. In multi-ethnic and multi-cultural societies of the West, this element of discrimination in welfare stands out starkly. However, similar arguments are also emerging from countries such as India, where the scheduled castes are effectively discriminated against in welfare policies—through a mix of corruption and the socio-political makeup of the state—despite constitutional promises to the contrary (Pankaj, 2019).

viii. The welfare state and the global inequality

Yet another perspective on the welfare state emerges from the post-colonial states. Here, as Bhambra and Holmwood (2018) show, it is essential to place the welfare system within a broader world-system. This tradition argues that the Western welfare state cannot be seen in isolation. It is directly dependent on not just immigration, but also the history of colonialism and the subsequent institutions that continue to exploit the ‘third world’. Hence, the welfare state is not so much a force for redistributive justice as it is a contributor to global inequality between the rich North and the poor Global South (Bhambra and Holmwood, 2018).

Justifications of the welfare state

While the welfare state can be challenged based on its ideological foundations, social implications, dangers of collectivism, discrimination, and economic efficacy, it is pertinent to take note of some of its key justifications.

i. Social development, welfare state, and individuals in the era of welfare

We start by looking at a key document serving as an exemplar of the thinking behind welfare measures as they were envisioned, designed, and implemented in UK and the other places. The Beveridge Report was a government report commissioned and published in 1942, drafted by the economist William Beveridge. In this report, written during the World War II, Beveridge proposed widespread welfare reforms to address what he labelled the key roadblocks on the way to reconstruction: want, disease, ignorance, squalor, and idleness. Through this, the report envisaged a welfare system that addresses not just income inequality and poverty, but also develops a broader set of institutions and provisions that can lead to a good quality of life for an average citizen. This report was highly influential and led to not just the expansion of social insurance in UK but also to the development of the National Health Service. In multiple ways, this document proved to be a foundational work in conceptualizing a welfare state, with other countries also adopting some of its key assumptions.

Within this report, Beveridge (1942) incorporated many of the aforementioned critiques of the welfare state. According to him, there were three main guiding principles of any good welfare system. First, any proposals for the future should not be limited by consideration of various sectional interests that may emerge. These included various trade unions, high-income groups, politicians, and bureaucracy. Beveridge believed that while experience from the past should guide policy today, it cannot be the sole progenitor of it. Second, the development and organisation of welfare state was not the end goal, but just one part of broader and comprehensive program of social progress. Third, the individual continues to play a key role in this system and not just be a mere recipient of state largesse. According to the report, the state must offer welfare services, but it should not stifle individual incentive, responsibility, and risk-taking. The report placed a high premium on voluntary actions by private individuals.

At the same time, the report strongly discourages means-testing and instead focuses on a more universal approach to welfare. This would include health services and support for old-age and



unemployment. However, it should be noted that, just as the critiques pointed out, the report explicitly designates a patriarchal family system as a given and the role of women is limited to households. Nevertheless, the Beveridge report is illuminating for two reasons in our analysis. On one hand, it indicates that the welfare state is not intended to stifle individual incentive and voluntary action. On the other, it also shows that a welfare state was meant to address the challenges of reconstruction post World War II. The report eventually shows that redistributive justice does not necessarily feature as a key priority in the plans for a welfare state.

ii. Citizenship and social class, civil, and political rights

Another strong justification for the welfare state emerges in the work of TH Marshall. In his essay, *Citizenship and Social Class*, Marshall (1950) argues that with the development of capitalism, three distinct areas of rights—each following the other—have emerged for a citizen. He called the first set of rights ‘civil rights’ which include the basic liberty of individuals, freedom of expression, freedom to own property, and access to justice. These civil rights inevitably lead to what Marshall identifies as political rights which entails the right to participate in the ‘exercise of political power’. While these two sets of rights are critical to any conception of a liberal society, Marshall (1980) goes one step further and argues that there are a third set of rights too, which he labels ‘social rights’. According to him, these are benefits and privileges which are associated with the welfare state. Other authors have found some serious implications in Marshall’s proposition about civil, political, and social rights. As Cohen (2012) argues, a modern conception of citizenship as envisaged within the framework of social rights cannot indefinitely coexist with stark inequalities. To ensure equality before law and participation in political processes, it is essential that citizens are equipped in material, health, education, and other terms.

iii. Rethinking welfare through capabilities and freedom

The literature on the welfare state focuses on other elements too. For instance, in his seminal work on welfare and poverty, Amartya Sen (1998) argues that social protection serves not just as a mere transfer of resources from the State to an individual, it also involves widening the overall ‘capabilities’ of an individual to allow them to live the life they value. Capabilities here refer to a broader set of abilities including material and nonmaterial needs. According to Sen, this is how freedom is achieved. However, this conception of freedom is fundamentally different and broader from how freedom or liberty were originally defined in earlier works on welfare states. Nevertheless, this approach has gradually become a defining part of the conversations on welfare and lead to the development of the human development index, which assesses countries on three things central to any conception of a welfare state: health, education, and income (Anand et al, 2009). Similarly, theorists such as Gorz (1999) argue for liberation from work and just distribution of work.

iv. Origin of modern welfare: balancing radicalism and capitalism

On the other hand, it is also essential to understand how the modern welfare system came into place. It has been argued that the welfare system was designed as a middle way between radical socialistic approaches and laissez-faire capitalism. For instance, as Graeber (2015) discusses, following a long period of unrest and revolutions across Europe, states developed the welfare system to ensure stability and peace. However, it should be noted that the objective here was to curtail radical approaches and not necessarily redistributive justice.

v. Welfare state’s role in capitalism: dismantling or taming capitalism?

Another similar idea emerges in the work of Erik Olin Wright (2019). Wright argues that there are five ways of dealing with capitalism: smashing, dismantling, taming, resisting, and eroding. In this typology, the welfare state appears as a mode of either dismantling or taming capitalism. The objective of this approach is to make sure that the worst outcomes and externalities of capitalism are mitigated by welfare provision. However, the welfare state as a mode of redistributive justice is yet again absent from this analysis.

vi. Evolution of capitalism: the shift towards capacity-building

Over the past three decades, another form of welfare state has emerged. Built by leaders such as Tony Blair and Bill Clinton, this updated version of the welfare state directly incorporates many of its critique and instead focuses on building individual capacities across the spectrum and ensuring



that welfare provision is a means to an end, and not the end itself. However, this version of the welfare state does not explicitly foreground redistribution of income as a key objective (Page, 2007).

Evidence over the past decades

Having taken stock of the critiques and justifications of the welfare state, we now turn to some recent evidence on the question of whether the welfare state has impacted inequalities in any way. But before that, we look at how the welfare state is characterized. As Barr (2020) places it, the welfare state has a dual role: piggybank and Robinhood. In this typology, as a piggybank, the welfare state provides against risks associated with disease, disability, and old age. Conversely, as Robinhood, the welfare state ostensibly redistributes wealth from higher-income groups to lower-income groups. Based on this typology, Esping-Andersen and Myles (2011) note that a significant portion of the welfare state functions as a piggybank, and that is where majority of the spending is geared towards. The redistributive element of the welfare state takes a priority backseat. Moreover, they argue that a welfare state is not the only explanatory factor for reduction in inequality in any setting. However, there is evidence of welfare states mitigating inequality. They achieve this via a series of interrelated mechanisms. First, through increased spending the government effectively transfers its own resources (collected via taxes) to those on the margins. Second, by directly providing services such as healthcare and education, the welfare state can effectively equalize access to those portions of the economy that are widely considered as central to a good living. Third, the welfare state has increasingly focused on alleviation of child poverty as one of its policy priorities. By targeting poverty among the young, the welfare state directly builds the overall capacities of the youth to participate in society and employment. Finally, by directly providing employment opportunities to beneficiaries, a welfare state increases the direct participation of the lower income groups in the economy from which they can then subsequently benefit (Esping-Andersen and Myles, 2011).

i. Nordic region and Belgium versus Anglo-Saxon countries

An interesting study by Wang and Caminada (2011) provides evidence of some level of success of the welfare state in challenging inequalities. Their data shows that countries with a strong welfare system, such as the Nordic region and Belgium, tend to have a relatively equal distribution of wealth. Moreover, direct transfers by the government—a common program in most welfare states—has an outsized role in the redistribution of income. However, their study finds a pattern of large primary income disparity in the Anglo-Saxon countries (Wang and Caminada, 2011). This is particularly notable considering the role NHS and other welfare schemes have played over the decades in these countries.

ii. Welfare state impact: Poverty alleviation versus inequality

A 2006 study by Palme illuminates another critical aspect of welfare state. Her data suggests that the welfare state programs do not have a negative effect on inequality. Instead, high expenditures in welfare spending alleviate poverty. Nevertheless, the study concludes, the specific effect on poverty and inequality is contingent on the variety of institutional arrangements within any welfare state.

iii. OECD countries

Another recent and broader study by Auguste (2018) indicates a mixed situation with regards to the welfare state and inequality. Deploying data from twenty-three OECD countries, the study argues that the welfare state continues to have an impact on income redistribution but interestingly it is negative. Evidence from other places such as China indicates that increased welfare reforms - including increased nutritional, health, educational and employment programs - does not necessarily lead to increased equality. This situation is possible even when the stated aims of the welfare state is increased inequality, as happened in China (Dillon, 2015).

iv. Denmark versus US

In one of his recent papers, the Nobel-prize winning economist James Heckman utilizes data from Denmark and US for a comparative look at inequality and social mobility. He argues that despite generous welfare policies in Denmark, the family influence on many child outcomes is similar to the U.S. This in turn leads to inequality of child outcomes, as a child's access to family wealth, along with the accompanying social and cultural capital, directly impacts their employment and mobility



chances. Thus, a significant inequality remains across social and economic classes in Denmark, regardless of their extensive welfare policies (Heckman and Landersø, 2021).

v. Inequality beyond money

The recent evidence also problematizes the idea of ‘inequality’. When we discuss ‘inequality’, we have so far focused on income or wealth inequality. However, there are multiple dimensions to the question of ‘social’ inequality. Bourdieu’s seminal work provides a good starting point for understanding this. Bourdieu (1986) shows that income is not the sole form of capital that an individual possesses. Bourdieu problematized the categorization of social class as well as expanded its range of determinants. According to him, it was not possible to account for the structure and functioning of inequality unless one reintroduces capital in all its forms and not solely in the one form recognized by economic theory. He breaks down capital into three forms: economic, social, and cultural. To redefine class, he wrote: “social class is not defined by a property (not even the most determinant one, such as the volume and composition of capital) nor by a collection of properties (of sex, age, social origin, ethnic origin – the proportion of blacks and whites, for examples, or natives and immigrants – income, education level, etc.), nor even by a chain of properties strung out from a fundamental property (position in the relations of production) in a relation of cause and effect, conditioner and conditioned; but by the structure of relations between all the pertinent properties which gives its specific value to each of them and the effects they exert on practices” (Bourdieu, 2002).

CONCLUSION

One key thematic running throughout this work focuses on whether the welfare state addresses the question of redistributive justice. Literature on welfare state shows that redistributive justice has not been the main priority area. In many ways, this reflects the origins of the welfare state itself. Built as it was in pre-dominantly Western societies to address the challenge of widespread poverty, the welfare state is not a direct response to social inequalities. In fact, as its various critiques indicate, the welfare state might be contributing to inequalities in multiple ways. First, through discrimination it can effectively side-line those on the margins. This can be based on race, ethnicity, gender, disability, and other dimensions of marginality. Second, by reducing the incentive to work and taxing the working young, it leads to an unsustainable situation whereby each successive generation essentially pays for the generation preceding it. This can lead to lower overall income. Third, the welfare state consumes significant resources to be operational and can therefore be costly for all members of the society in the long run.

Increased austerity measures over the past two decades and the rise of populism in Western and non-Western societies have put the debate on welfare back at the centre. But as Galbraith (1958) argues, the welfare states were originally designed in a period of high poverty. It was designed to directly address the ravages of the industrial revolution as well as the destruction of two world wars. It could be argued that we are now currently faced with a different set of challenges. While poverty, malnutrition, and other ills continue to be a challenge for millions across the world, there has also been extensive alleviation of poverty. This is reflected in numbers across the world (Hasell, 2022). On the other hand, inequality continues to be a challenge. And as the work of Bourdieu and others show, inequality is much broader than just distribution of wealth. It involves a whole host of other elements that must be addressed. The hypothesis of welfare state as a solution to these set of problems is not supported by evidence, which indicates mixed results.

In conclusion, we could argue that over the past few decades, the welfare state has played its role in alleviating poverty. The various critiques and studies agree on this. However, the welfare state has its own set of problems. It affects individual liberty, incentives, and can be discriminatory. Additionally, the welfare state has not been a mechanism for redistributive justice, even if in certain settings it does impact it. Thus, the solution to social inequalities must be developed beyond just the idea of the welfare state. Whether this would involve a reconceptualization of the welfare state is yet to be seen.

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