A Gendered Double Movement? Income Security and Family Policy Dynamics Over Three Decades

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Over the past decades, social policy in OECD countries has experienced two shifts: First, the emerging focus of family policy towards family-work reconciliation (Gornick/Meyers 2003) and, second, the stricter conditions in the field of income security due to labour market activation policies (Kvist 2002). Analysing family policies and income security policies simultaneously allows to investigate: 1) to what extent women are relieved of their familial duties or encouraged in their role as mothers and 2) to what degree are citizens able to "uphold a socially acceptable standard of living independently of market participation" (Esping-Andersen 1990, 37). In comparative welfare state research, these questions have often been answered separately: Concepts like familisation and individualisation[1] are often used to describe gendered welfare regimes (Daly 1994; Lewis 1992; Orloff 1993; Sainsbury 1997), whereas decommodification and (re)commodification are used to classify welfare state regimes in general (Esping-Andersen 1990; Pierson 1996, 2002). By combining both perspectives, this article follows the theoretical framework that reintroduces Polanyi's category of a "double movement" (Ferragina 2019; Fraser 2017; Polanyi 1944) into family policy research and thus emphasizes the ambiguity of gender liberation and commodification and liberalisation (ibid.). The gendered double movement is interpreted to be a result of the combination of increased commodification and increased individualisation and hence a transformation of (gendered) welfare state regimes. To trace these dynamics empirically, four dimensions (familisation, individualisation, commodification and (re)commodification) are combined and measured by four indices. Data from multiple sources of 17 OECD countries over 25 years are utilised to answer three questions: 1) Can a shift towards individualisation and commodification in OECD welfare states be identified? 2) Can distinct types of welfare states be identified based on the four dimensions? and 3) Are they consistent over time?
The article is organised as follows: It first discusses the concept of a double movement in the context of the political economy of gender. It continues with a conceptualisation of defamilisation, familisation, and individualisation on the one hand, and decommodification and (re)commodification on the other hand, and combines both concepts to build a typology. Then, the operationalisation and measurement of the concepts are presented: two new indices of familisation and individualisation are constructed. An overview of K-means Cluster Analysis (KCA) is given as the method used to group of welfare states at several points in time together. The empirical results are then discussed, focusing on three aspects: The general policy shift and the results of the KCA, the types of welfare state that are identified and – due to the use of longitudinal data – the welfare state type dynamics.
The findings reveal a trend towards increased commodification from 1985 to 1995 and a rise in individualising policies from the late 1990s. Six distinct welfare state

https://doi.org/10.3224/feminapolitica.v33i2.03

types were identified, highlighting both stability and shifts. Most remarkably is the shift towards the optional familialistic/individualistic flexicurity type.
This article contributes to the research on the political economy of gender in two ways. Substantively, the use of four dimensions enables a nuanced perspective that not only dissolves the double movement into the dichotomy of more individualisation and less decommodification but also shows that combinations of individualising and familising policies create more ambiguity in the options of how to divide labour in the family. Potentially it may translate into an increased double burden for mothers, as well as new class differences among women. Methodologically, the article constructs a new index for familisation and individualisation over three decades to utilise a cluster analysis with longitudinal data. This contributes to a rarely taken perspective in (gendered) welfare state research, which allows to trace changes in welfare states over a long period of time (Ciccia/Sainsbury 2018).

Revisiting the Double Movement

A recent contribution by Ferragina (2019) brings together the perspective of the political economy of gender, as well as the debate about the transformation of the welfare state by referring to Jessop's (1993) theory of the transition from the Keynesian Welfare State (KWS) to the Schumpeterian Workfare State (SWS). Jessop situates increased commodification in the transition from the KWS to SWS, which is linked to the transition of the Fordist to the Post-Fordist political economy and a new form of social intervention by the state. A central aspect in Jessop's theory is a shift in the goal of welfare states in terms of economic and social reproduction from support of full-employment through a demand-sided management of a national economy to "the subordination of social policy to the demands of labour market flexibility and structural competitiveness" (ibid. 9) of a globalised economy. This not only encourages the welfare state to integrate men more strongly into the labour market but can also lead to the targeted integration of women into the national labour market (Jessop 1998). This shift has led to a partial erosion of the division of labour within families, creating new opportunities, and it has also increased the double burden of women as carers and workers, creating risks due to the increased austerity strategies of the welfare state (ibid.).
Ferragina (2019) characterises the new opportunities and risks women face as a double movement. Thereby, he refers, in a similar way as Fraser (2016, 2017), to Polanyi's thesis which he used to describe the protection of the male worker over the course of the 19th and the beginning of the 20th centuries and transfers this to the dynamics starting at the end of the golden age of the welfare state and capitalism (Esping-Andersen 1996; Polanyi 1944). For Polanyi, a movement towards the commodification of labour is accompanied by a countermovement of decommodification by the welfare state aimed to protect the worker from the harmful effects of market economies (ibid.). Ferragina's narrative applies Polanyi's concept to women's

labour focusing on family policy expansion. Family policy, especially the expansion of childcare for young children in combination with diminishing income security for low-income families, forces women into the labour market (the commodifying movement) and simultaneously reduces women's reproductive tasks (the countermovement). Family policy expansion, therefore, has a double effect: "a tool to foster neoliberal capitalism" (Ferragina 2019, 1258), that provides a "gender-friendly" (ibid.) offer to deal with rising care costs.
Ferragina's argument is built upon here by specifying that the double movement is the product of a mix of individualising family policies and commodifying income security policies. Conceptual and empirical analyses that combine literature on individualisation and familisation with the conceptualisation of decommodification and (re)commodification are rare (e.g., Ferragina 2019; Mandel/Shalev 2009). For the analysis of the political economy of gender and gendered welfare state research, however, the combination of income security and family policy seems fruitful as it shows how social policy sets objectives for the role of women in the family and on the labour market. In the following, all four dimensions will be conceptualised to develop an analytical framework which allows to uncover variation in these domains over time and between countries.

Conceptualisation of Family and Income Security Policies

Comparative welfare state research has been strongly influenced by the typology of Esping-Andersen (1990), where he defines three core dimensions on which welfare states qualitatively differ between each other: 1) The degree of decommodification, which he defines as follows: "(a) minimal definition must entail that citizens can freely, and without potential loss of job, income, or general welfare, opt out of work when they themselves consider it necessary" (ibid. 23). 2) The type of social stratification, which is (re)produced by the welfare state, and 3) the relationship between state, market and family regarding social provision (ibid).
Especially from a feminist perspective, the concept of decommodification has been criticised regarding gender-blindness and failure to account for the role of women in society (e.g., Daly 1994; Lewis 1992; Orloff 1993).

Family Policies: Decoding Defamilisation, Familisation and Individualisation

The concept of defamilisation (Lister 1994), which was introduced first in the beginning of the 1990s as a response to the concept of decommodification, addresses this relationship and aims to capture the gender-specific order that is supported by the welfare state. Attempts to implement defamilisation in classical welfare state research (Esping-Andersen 1999; Korpi 2000) were criticised for failing to analyse the responsibilities women face in the family while connecting the concept only to female employment.[2] Leitner's (2003) typology of "varieties of familialism" was a

response to this shortcoming. It focuses on policies that matter for women's participation in unpaid and paid work. It represents an extension of the previous conceptualisation as it does not understand familisation as the opposite pole of defamilisation on a gradual scale, but as separate categories.

Leitner (2003) considers familisation and defamilisation as two separate dimensions, with low and high degrees. She argues that different policies can be classified as familising or defamilising depending on the extent to which they keep caring responsibilities private and withdraw women from the labour market (e.g., long durations of unpaid parental leave) or release women from caring responsibilities (e.g., public childcare) and enable women to be available for the labour market. Here, the updated concept, following Lohmann and Zagel's (2016) incorporation of Daly's (2011) suggestion to replace "defamilisation" with "individualisation", is used. Individualisation emphasises the reduction of gender-related dependencies through policies that support individuals, without implying that they undermine family structures (Lohmann/Zagel 2016). Figure 1 shows the updated conceptualisation (left panel), which remains similar to Lohmann and Zagel's concept.[3] The two-dimensional concept allows for capturing a policy-mix (Leitner 2003), whereby the labels highlight the expected outcomes of the combination of the implemented policies. A high degree of individualising policies and a low degree of familising policies result in individualism; whereas a low degree of individualising policies and a high degree of familising policies result in familialism.

Especially with the expansion of public childcare since the beginning of the 2000s, welfare states have extended their individualising policies, whereas joint taxation of spouses such as the German Ehegattensplitting, which has a familising effect, continue to exist. Due to its flexibility, the concept can account for the contradictory effects of persistent familialism despite expanded individualism. This combination allows both the dimension "optional individualism" and the dimension "optional familialism". Lohmann and Zagel argue that this combination of policies may result in both possible outcomes "stronger reliance on family members on the one hand or weaker dependencies on the other hand" (Lohmann/Zagel 2016, 54 et seq.). The combination of a low degree of familising and individualising policies is labelled as "implicit familialism" or "implicit individualism". In both cases, the extent to which it translates more towards familialism or individualism is not solely dependent on the implemented family policies, but may also be influenced by other factors, such as cultural differences between welfare states (Lohmann/Zagel 2016; Pfau-Effinger 2004). For instance, if childcare is broadly implemented, take-up rates may be low because of norms surrounding it. Additionally, a low degree of individualising and familising policies can lead to a greater class division within welfare states, as families with higher incomes have the option to outsource care obligations and do not rely on welfare state support.

The incorporation of the concept of individualisation renews the need to include the concept of decommodification in an analysis of the political economy of gender.

Although individualisation is also commodifying (Leitner 2004; Ostner 2004), individualisation in this conceptualisation is connected to social policies that are targeted to modify state–family relations. The following concepts of income security policies are, in contrast, targeting on state–market relations.

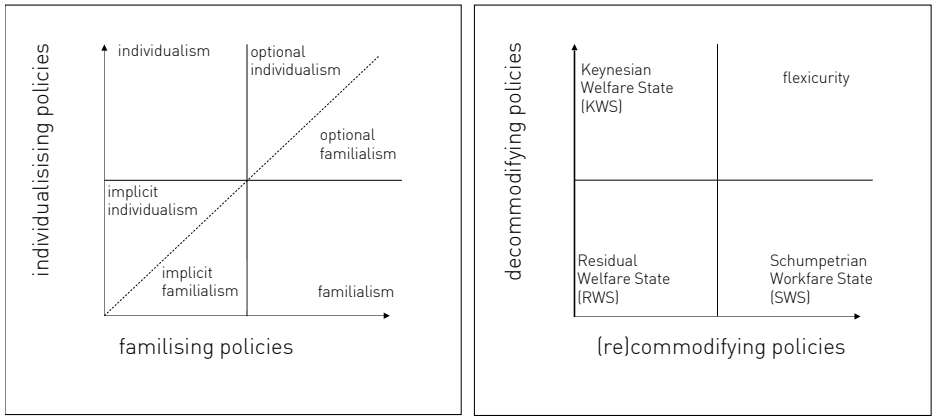
Income Security Policies: Decoding Decommodification and (Re) commodification

The concept of decommodification describes the extent to which welfare states provide income to their citizens when they opt out of the labour market (Esping-Andersen 1990). Labour market activation policies that push individuals back into the labour market are often discussed under the term (re)commodification (Pierson 2002). (Re)commodifying policies tighten eligibility requirements or reduce unemployment benefits (ibid.), leading to the acceptance of jobs on employers' terms. Parallel to the conceptualisation presented for family policies, decommodification is defined here not only as the opposite of (re)commodification on a gradual scale, but also as a two-dimensional definition. The combination of both dimensions allows to uncover a policy-mix (see Figure 1, right panel), whereby the labels of the combination present the expected outcomes.

The combination of a high degree of decommodification and a low degree of recommodification policies results in the KWS, where citizens are protected from the risks of the market. Low degrees of decommodification and high recommodification represent the SWS, where social security is low and labour market policies are implemented to satisfy the demand of the labour market.

The combination of a low degree of decommodification and a low degree of (re) commodification policies results in a residual welfare state (RWS) (Titmuss 1950), where welfare is provided as a last resort. Citizens are implicitly dependent on the labour market or on other sources of reproduction, like the family. Finally, the combination of policies with a high degree of decommodification and a high degree of (re)commodification is connected to a conditional welfare–workfare state, called flexicurity (Viebrock/Clasen 2008).[4]

Figure 1. Ideal-typical configurations of state-family/state-market relations in welfare states.



Note : Four dimensions: Left: conceptual dimensions of individualisation and familisation. Figure adopted in a modified form from Lohmann and Zagel 2016 and Leitner 2003. Right: conceptual dimensions of decommodification and (re)commodification.

Revisiting a Typology of Gendered Welfare States

While the left panel of Figure 1 focuses on dependencies in the family, the right panel focuses on policies that produce liability on the market. The combination of state–family relationships and state–market relationships on two dimensions each leads to 16 hypothetical ideal types, which are analytical constructs and represent cases that do not occur in reality. Although these constructs are not represented in their pure form, some combinations are more likely to be found empirically. Both concepts are mutually dependent on each other and have explanatory power for the role of women in society primarily through their interaction. For instance, individualism in combination with a KWS that Fraser might interprete as democratic socialism (Fraser 2022) with high protection from the market and at the same time low dependencies within the family achieved by a high degree of public care. The combination of individualism and the SWS implies the reduction of familial responsibilities with a commodification of women's labour, whose result is interpreted here as the neoliberal double movement. The combination of the KWS and familialism is connected to the male-breadwinner model of Fordism (Jessop 1993). In this context, women relied on the family wage of the production worker. Especially optional individualism/familialism does not necessarily entail a *complete* release of women from the family responsibilities. Simultaneously, flexicurity can account for new arrangements of flexible working conditions and reduced working time, which facilitates the mother's entry into the labour market. The combination of familising and individualising policies provide the right to choose how to organise paid and

unpaid work within the family by acknowledging the dual role of mothers; it does not necessarily release mothers from the reproductive work completely (Daly 2011). To investigate the combinations of implemented policies by the welfare state, the next step discusses the operationalisation of the four dimensions for the subsequent empirical analysis.

Operationalisation

Table 1. Overview of the used indicators/indices.

Dimension		Indicator	Source
Family policy	**Individualisation** *Individualising policies (Index calculated from the presented indicators)*	*Public spending on family benefits in services as per cent of GDP.*	OECD family indicators PF1.1 (OECD 2023)
		Weeks of well-paid parental leave (more than 60% of income) for 5-year intervals.	PLB (SPIN)*
		Paid paternal leave total.	OECD family database PF2.5
	Familisation Familising policies (Index calculated from the presented indicators)	*Maximum weeks of job-protected maternity, parental and home care leave available to mothers, regardless of income support reduced by weeks of paid leave.*	OECD family database PF2.5
		Marriage Subsidy allowances and taxes for 5-year intervals.	SIED (SPIN)
		Tax reduction indicator (yes/no) for allowances and taxes, weighted at 0.5, measured in 5-year intervals.	CBD (SPIN)
		Universal child benefit indicator (yes/no) for allowances and taxes, weighted at 0.5, measured in 5-year intervals.	CBD (SPIN)
Income security policy	**Decommodification**	*Index measuring unemployment generosity.*	CWEP (Scruggs 2022)
	(Re)commodification	*Index measures the overall conditionality of unemployment benefit systems.*	The Comparative Unemployment Benefit Conditions and Sanctions Dataset (Knotz/Nelson 2019)

* SPIN s. Nelson et al. 2020

Constructing a Familisation and an Individualisation Index

Comparative welfare state research often utilises the concept of defamilisation or related concepts to find different configurations of social and family policies between countries. However, there is no consensus on the question of how to measure familisation, defamilisation, or individualisation,[5] as there is no consensus on the definition of the concept (Zagel/Lohmann 2021). Some policies seem central for the measurement of familisation, defamilisation, or individualisation, like the provision of childcare and parental leave regulations (Javornik 2014). However, other empirical analyses include indicators on tax allowances and cash benefits as well (Daly 2011). While the provision of public childcare is consistently classified as defamilising or individualising,[6] parental leave regulations are very complex and may have individualising and familising effects through their configuration regarding duration, compensation, and their targeting towards each parent (Ciccia/Verloo 2012; Javornik 2014).

Two new indices are constructed here (see data sources in Table 1).[7] For the individualisation index, 1) the spending on services as per cent of GDP for the dimension of early years care[8] is included. Moreover, two indicators on parental leave are also included: 2) the duration of well-paid leave[9], as well as 3) duration of paid paternal leave.

For the familisation index, the following indicators are included: 1) the total number of weeks a mother is guaranteed unpaid parental leave[10] and 2) marriage subsidy (Montanari 2000). Moreover, two dichotomous indicators are utilised: 3) if parents receive child-related tax reduction or not and 4) if parents get universal child benefits or not.[11] Based on these indicators, two additive indices have been constructed. In a first step, each indicator was scaled between 0 and 1 so all were on the same scale. In a second step, they were added. For the familisation index, higher values correspond to familisation and lower values to less familisation. The same applies to the individualisation index.

Using a Commodification and (Re)commodification Index

For the two dimensions of decommodification and (re)commodification, two widely used indices were utilised (see Table 1). To operationalise decommodification, the unemployment generosity index from the "Comparative Welfare Entitlements Project" (CWEP) was used (Scruggs 2022).[12] The index is a composition of replacement rates, qualifying conditions, duration limit, waiting days, and coverage.[13] For the dimension of (re)commodification an index from the "The Comparative Unemployment Benefit Conditions and Sanctions Dataset" (Knotz/Nelson 2019) was used, which measures the conditionality under which citizens must seek and accept employment without being sanctioned. The index is a composition of availability requirements to accept a job, job search and reporting requirements, as well as sanction

rules (Knotz 2018; Knotz/Nelson 2019). Using all four indices together provides a foundation for the previous presented concepts.

Methods and Dataset

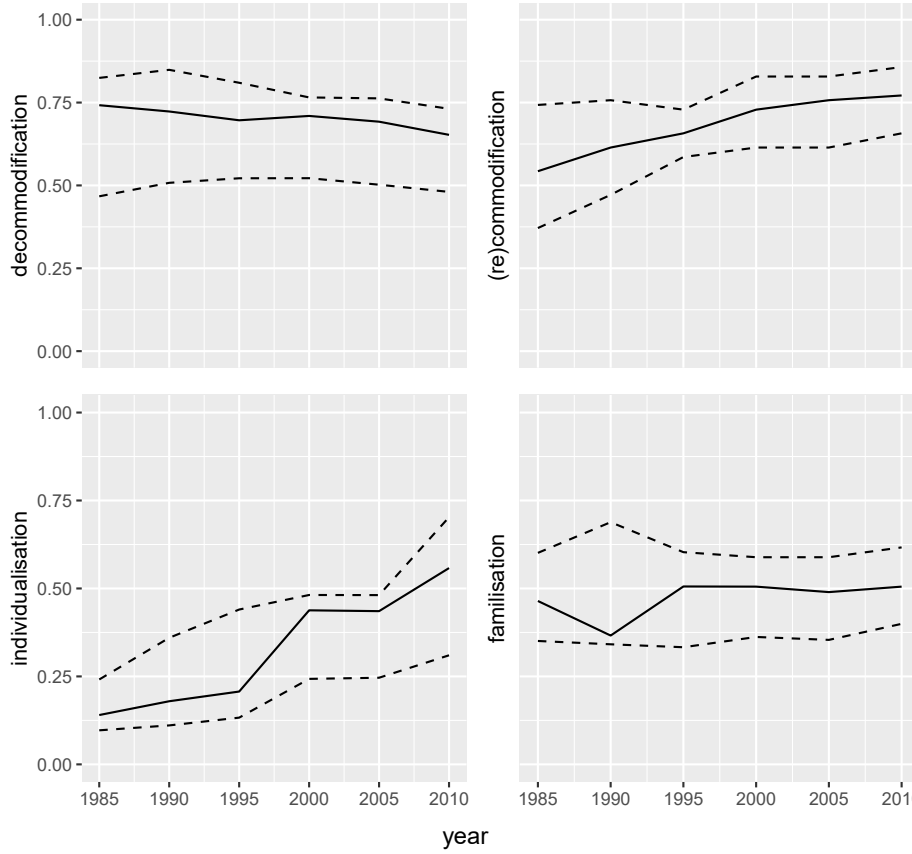
To identify distinct combinations of welfare states on the four dimensions, cluster analysis was applied, which provides a descriptive tool to uncover structure and reduce complexity in the data based on multiple dimensions. K-means Cluster Analysis (KCA, Hartigan/Wong 1979) was used to identify groups of welfare states with high similarity and to distinguish those which are most dissimilar along four dimensions. It has been utilised in contexts of finding the type of welfare regimes by different scholars (e.g., Bambra 2007; Cho 2014; Danforth 2014; Ferragina/Seeleib-Kaiser/Spreckelsen 2015; Gough 2001; Kangas 1994). While many of these studies rely on cross-sectional data[14], the following analysis is based on 17 countries (Australia, Austria, Belgium, Canada, Switzerland, Germany, Denmark, Spain, Finland, France, Great Britain, Italy, Japan, the Netherlands, Norway, New Zealand, and Sweden) in six points in time (1985, 1990, 1995, 2000, 2005, and 2010). To bring all four indices on the same scale, all were divided by the maximum, so that all four indices were in the range between at least 0 and 1. This resulted in 102 cases. Sample selection is based on data availability.[15] In the following, a six-cluster solution of 95 observations[16] identified by the KCA algorithm are presented.[17]

Results

Commodification and Individualisation Over Time?

The first research question asks whether there is a shift towards increased individualisation and commodification. Figure 2 shows the development of all four indicators over time. It presents the median, as well as the 25th and 75th percentiles for each 5-year interval for the period between 1985 and 2010. The familisation index stayed mostly consistent, while the median decommodification index decreases slightly over the whole period. Conversely, there is an increase in the (re)commodification and the individualisation indices.

Figure 2. Development of family and income security policies between 1985 and 2010, by the scaled indices.



Note: Solid line presents the median, dashed lines present the 25th and 75th percentiles.

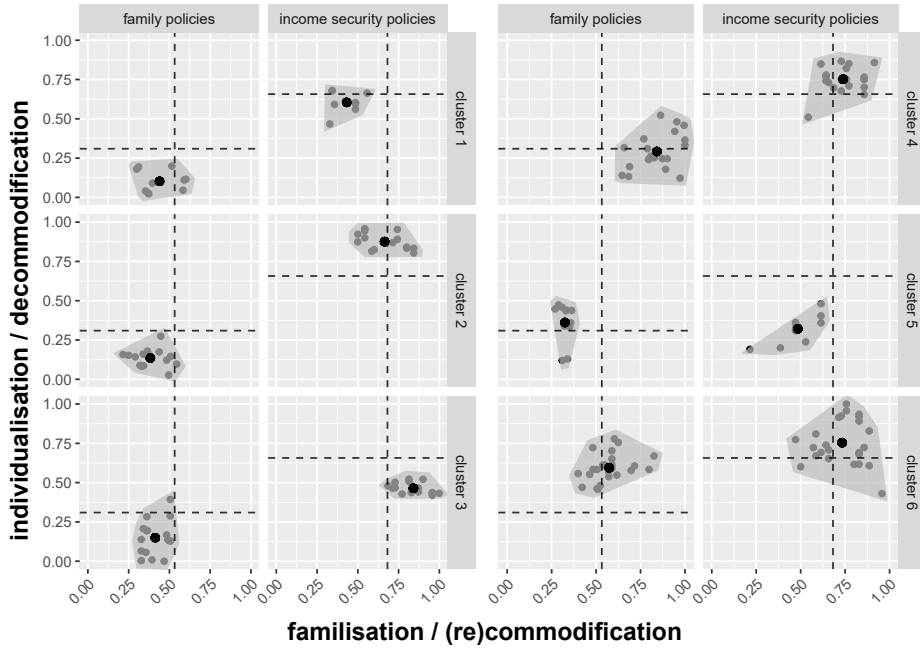
Source: Calculated from data presented in Table 1.

Between 1985 and 2010, the median (re)commodification index rose from around 0.5 to 0.75, and the 25th percentile in particular rose sharply from 0.37 to 0.61. For the individualisation index, the median increased from 0.14 in 1985 to 0.56 in 2010. However, the strong increase started from 1995 onwards.[18] The median increased between 1995 and 2000[19], but for the 75th percentile, the increase had already taken place and there is a strong increase from 2005 onwards. Overall, there are two periods of *change*: First, an increase in (re)commodification between 1985 and 2000 and, second, an increase in individualisation from 1995 until 2010.

Types of Welfare States, Placements along Four Dimensions

The following section presents the results of the cluster analysis to identify types of welfare states.[20] Figure 3 shows the six cluster solutions of the KCA. Each cluster is presented as a combination of family (on the left) and income security policies (on the right). The dashed lines highlight the overall mean on the respective dimension.

Figure 3. Empirical configurations of family and income security policies by six clusters



Note : Black dots present the cluster centres. Grey dots present the individual cases. Dashed grey lines present the overall mean on each dimension.

Source: Calculated from data presented in Table 1.

Three Different Implicit Familialism/Individualism Clusters

Clusters 1, 2, and 3 are very similar on the family policy dimension: All three present weak familising and individualising policies, which can be interpreted as an implicit focus on family policies in those welfare states. However, all three deviate on the income security dimensions, which tend to correspond to the three definitions of the presented ideal-types (KWS, flexicurity, and SWS).

Cluster 1 represents a comparatively low degree of (re)commodification and slightly below average degree of decommodification, which would be placed between an

implicit familialistic/individualistic RWS and KWS. It includes ten cases (Austria ’85-’95, Canada,[21] and Great Britain ’85).
Cluster 2 consists of 14 cases (Belgium ’85-’95, Switzerland, Spain ’85, and the Netherlands ’85-’00), on the income security dimensions, it has overall highly decommodifiying policies, and has implemented slightly below average recommodification policies. This cluster is therefore classified as an *implicit familialistic/individualistic KWS or flexicurity*.
Cluster 3 comprises of 16 cases including Australia, New Zealand, and Great Britain ’90-’05. This cluster provides the highest degree of commodification among all clusters and a comparably low degree of decommodification. It can be characterised as an *implicit familialistic/individualistic SWS*.
Looking at the time dimension, the number of cases in these clusters decreases over the years. In 1985, all three clusters together consist of nine welfare states; in 2010 it reduced to four. The remaining four welfare states (Canada, Switzerland, Australia, and New Zealand) stay in the respective cluster and indicate path-dependency, sticking with implicit family polices. Great Britain – which will be discussed separately later – is the only country which shifted within those three clusters from RWS/KWS to the SWS.

Familialistic Flexicurity

Cluster 4 is the cluster with the strongest familising policies combined with flexicurity, and it consists of 20 cases (Germany ’85-’05, Spain ’90-’10, Finland ’85, France, the Netherlands ’05, Norway ’85 and ’90). Note, however, that Finland ’85 is an outlier with comparably low values for both axes of the income security policies.

Individualistic RWS

Cluster 5 consists of eleven cases from two countries, Italy and Japan between ’85 and ’05. It is a clear RWS, with low values on the income security dimensions. On the family policy dimensions, it is rather individualistic, however, Japan in ’85 and ’90 has low values. As Japan has provided a strong shift in family policy, this case will be discussed separately. This cluster would be classified as an *individualistic RWS*.

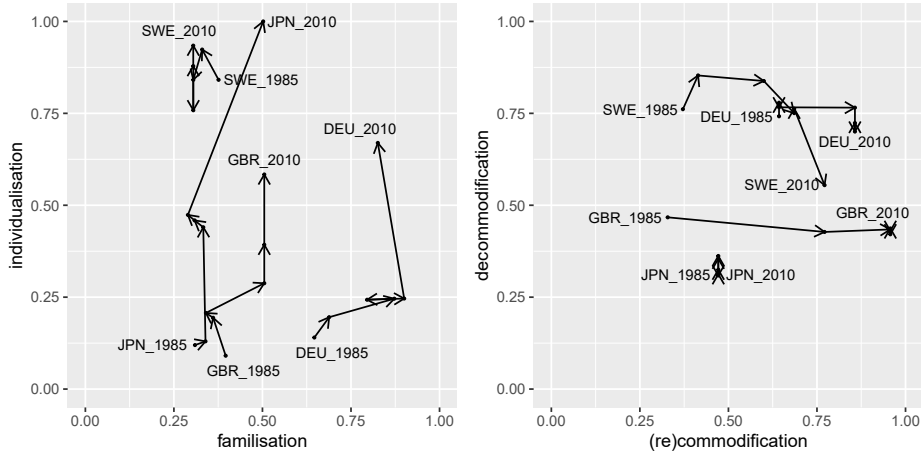
Optional Familialistic/Individualistic Flexicurity

Cluster 6 is the largest cluster containing 24 cases (Austria ’00-’10, Belgium ’00-’10, Germany ’10, Denmark, Finland ’90-’10, Great Britain ’10, the Netherlands ’10, and Norway ’95-’10). Most striking are the comparably high values on both family policy dimensions, thus the combination of strong individualising and comparably strong familising policies. However, there is much dispersion on income

security policies. For instance, Denmark, which is often cited as a classic social democratic welfare state (Ferragina/Seeleib-Kaiser 2011), has, over all periods, low values on the (re)commodification and high values on the decommodification dimension. Finland and Austria, which had similarly low (re)commodification values, expanded (re)commodifying policies after ’00. Especially Belgium, Norway, and the Netherlands, but also Austria and Germany, provide high values on both income security dimensions and can be allocated to the flexicurity corner. Great Britain, in contrast, provides an outlier in income security policies, with very high values on the (re)commodification and low values on the decommodification scale. Overall, the combination of a high degree of individualisation and (re)commodification makes this cluster representative of the *gendered double movement.* There is a mixture of welfare states which remain in the same cluster over the whole period (seven countries), while nine countries change between clusters over time. The analysis shows that this path-shifting is particularly connected to the expansion of individualising family policies, and the move to the optional familialistic/individualistic flexicurity, especially in the period between 2005 and 2010. This convergence in family policy corresponds to the paradigm change in family policy which primarily took place in the EU in the middle of the ’00s following the Barcelona Targets (European Commission 2022).

To illustrate the changes underlying consistency and shifts in cluster placement and to highlight two outliers, Figure 4 charts the development of the individual indices for four cases:

Figure 4. Presentation of four special cases (Japan (JPN), Great Britain (GBR), Germany (DEU) and Sweden (SWE)) by family and income security policies shifting over time.



Source: Calculated from data presented in Table 1.

In the analysis, Germany shifted from the familialistic flexicurity to the optional familialistic/individualistic flexicurity, and Great Britain, which moved from an implicit familialistic/ individualistic KWS to the familialistic/individualistic SWS, and then to optional familialistic/individualistic flexicurity. Both Germany and Great Britain provide interesting cases regarding the introduction of employment-oriented family policy (Fleckenstein/Seeleib-Kaiser 2011) and were also characterised as path-shifting before (Morgan 2013). Germany was discussed as a pure conservative welfare state with extensive familising policies, and a male-breadwinner model until the 1990s (Seeleib-Kaiser 2016). As Figure 4 shows, Germany increased its familising policies between 1985 and 2005, however, between 2005 and 2010 there was a strong increase of individualising policies, which reflect the reform of leave regulations as well as the start of early childcare expansion in the middle of the 2000s. This has been characterised as paradigmatic in the family policy (Blum 2017). Beyond this, Germany has increased the (re)commodifying policies in the late 1990s (Knotz 2018).[22] Both developments have been described as the end of the characterization of a conservative welfare state (Seeleib-Kaiser 2016).

Great Britain has also seen a strong shift in family policy, particularly between 2000 and 2010, by increasing its individualising policies (Morgan 2013) and at the same time dramatically increasing its (re)commodifying policies between 1985 and 2010 (see Figure 4). The combination of strong (re)commodifiying policies with comparably weak decommodifying policies – to integrate individuals in the labour market – provides a quite unique case (Clegg 2010).

Sweden and Japan in 2010 were excluded from the cluster analysis as they provide special cases. Sweden was long considered the archetypical social democratic welfare state and high in gender equality (Ferragina/Seeleib-Kaiser 2011). Family policies in Sweden were highly individualising already by the 1980s, before the general trend started. Also, income security policies were highly decommodifying. Although the degree of individualisation remained high until 2010, there has been a trend towards retrenchment of income security and an increasing commodification between the 1980s and 2010 (see Figure 4). This seems like a unique path, as Sweden started at a high level of decommodification.

This contrasts with Japan, which is often categorised as a liberal welfare state (ibid.) and corresponds to the classification of an RWS here. Although regarding family policy it was categorised as conservative (Bambra 2007), individualising policies increased strongly, especially between 2005 and 2010 (Seeleib-Kaiser/Toivonen 2011). Japan offered the highest paternal leave benefits in 2010. However, the take-up of leave by fathers remains low (Miyajima/Yamaguchi 2017). This combination, especially in 2010, represents a rather unique case, which is often mentioned as difficult to classify (e.g., Bambra 2007). All four cases exhibit sharp shifts on the dimensions of individualisation and/or (re)commodification. However, Japan tended to move towards individualisation, Sweden towards (re)commodification, and Germany and Great Britain experienced shifts on both dimensions.

Discussion

Over the past decades, social policy in OECD countries has experienced two major shifts: in family and income security policies. This article developed a new theoretical and empirical approach to trace the dynamics across 17 OECD countries. Empirically, this article identified a tendency towards (re)commodification which was strongest from 1985 to 1995, and an increase of individualising policies consecutively starting at the end of the 1990s. Moreover, by applying cluster analysis with a longitudinal perspective, six types of welfare states were distinguished. The change over time was also traced. Although it was possible to identify consistency in seven countries, which can be classified as a "'frozen' welfare state landscape" (Esping-Andersen 1996, 24), path-shifting (Morgan 2013) of welfare states towards an *optional familialistic/individualistic flexicurity* was identified, which is representative for a gendered double movement.

It is striking that mostly countries in the European Union (France and Italy provide exceptions) are shifting in this direction. One possible explanation may refer to the targets formulated by the European Union for family policy (Barcelona Targets) and the influence of European labour market strategies (Daly 2012) on the national policies.

Due to the connection of the four used dimensions to measure state–family *and* state–market related policies at different points in time, it is not so straightforward to compare the results with other typologies. However, the Nordic countries (Denmark, Finland since 1990, and Norway since 1995) represented in the optional familialistic/individualistic flexicurity type are overall often classified as social-democratic welfare states in other analyses (Ferragina/Seeleib-Kaiser 2011). Sweden's shift away from the prototypical social democratic welfare state has also been noted before (Vis 2007). Nevertheless, the high degree of individualising policies remains unique. Germany until 2005 and France are often classified as Conservative Welfare states. In the analysis they have a strikingly high degree of familising policies (Ferragina/Seeleib-Kaiser 2011). However, Germany experienced a paradigmatic shift in the 2000s (Seeleib-Kaiser 2016). Canada, often classified as liberal (Ferragina/Seeleib-Kaiser 2011), follows the path of an implicit individualistic/familialistic RWS.

Including the four-dimensional scheme of family and income security policies reveals that the increase on both dimensions is not connected to the reduction, but rather to a stronger conditionality to benefits. This increases citizens' reliance on the labour market and can be linked to the literature which cannot identify a general retrenchment of the welfare state (Reinprecht/Seeleib-Kaiser/Sowula 2018). Thereby, this article follows the notion that the extension of individualisation and the increased flexicurity can be interpreted as policies "for the market" (Fleckenstein/Seeleib-Kaiser 2011, 146 following Iversen 2005). Especially from a feminist political economy perspective, future research should include gendered Varieties of Capitalism (VoC) (Estevez-Abe 2009; Iversen/Rosenbluth 2008) to analyse women's labour market outcomes in different

types of labour markets. The mixture of familising and individualising policies may increase a *double burden* for mothers while reinforcing one-and-a-half worker model characterised as "neo-familialism" (Daly 2011, 19).

Moreover, further research should focus on the gendered class consequences of these social policy combinations (Ferragina 2019) especially as the outcomes of the division of labour within families may vary strongly between classes due to the optional familialism/individualism and flexicurity. The potential class division can be connected to the literature on gendered trade-offs (e.g., Hook/Li 2020; Pettit/Hook 2009) and paradox effects (e.g., Brady/Blome/Kmec 2020; Korpi/Ferrarini/Englund 2013; Mandel/Semyonov 2005; Mandel/Shalev 2009). The higher inclusion of women in the labour market also results in the commodification of care. The effects of these individualising policies should be discussed in the context of the debate about the social reproduction crisis (Fraser 2016, 2022).

Including more recent data and considering further points in time is crucial for future research. Since 2010, there have been many changes in family and income security policies, particularly following various financial crises which have influenced these dynamics significantly. Using more recent data may also improve the data quality of the indices. For instance, it is preferred to use childcare coverage rates over expenditure data to measure one central individualising indicator. However, due to data availability it was not possible to implement this indicator for this analysis. Consecutive research can build up coverage rates, as time-series mostly start in the beginning of the 2000s (OECD 2023). Moreover, as states' legal notion of family is not necessarily connected to the heteronormative nuclear family, further research should include indicators that are based on rights that are granted to diverse families including same-sex marriage, leave-regulations, and adoption in their analysis, as rights towards LGBTQ+ people have been expanded in OECD countries over the last decade (Mendos et al. 2020).

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Anmerkungen

1 By mentioning individualisation, the concept that replaced defamilisation (Daly 2011) is referred to. See below for further discussion.

2 For an overview, see Lohmann and Zagel 2016. Since the emergence of the concept, its notion has changed; however, there is still neither a uniform definition nor a uniform spelling.

3 Here, only the dimension of defamilising policies is updated by individualising policies.

4 Flexicurity, which is the combination of flexibility and security, has been prominent as European employment strategy (Viebrock/Clasen 2008).

5 To capture the multidimensionality of policy packages, several indices have been created. For instance, the index of Gender Equality in Family Leave Policy (Gornick/Meyers 2003), the welfare state intervention index (Mandel/Semyonov 2005), and eligibility index of entitlement types (Dobrotić/Blum 2020), to name just a few.

6 For an overview see Lohmann and Zagel 2016.

7 Lohmann and Zagel 2016 are roughly followed, however, the dimension of elderly care is excluded.

8 OECD changed the measurement of the time-series in 1997. Data before and after are not strictly comparable. While public childcare coverage rates are preferred, there is no indicator which allows to cover such a long period over different countries (OECD 2023).

9 Well-paid leave is defined here as at least 60% of the former income following Lohmann and Zagel 2016, while the OECD definition implies 66% (Dobrotić et al. 2023).

10 The weeks of paid leave are subtracted.

11 Both dichotomous indicators are weighted with 0.5, as it can be argued that they measure a similar dimension. If neither of both policies is implemented the value is 0, if one is implemented 0.5, and if both are implemented, it is 1.

12 The generosity index is an update of the original decommodification index introduced by Esping-Andersen, considering methodological weaknesses (Scruggs/Allan 2006). In this analysis, the focus was on employment, not on pension and sickness, as protection against unemployment seems to be central to the question of who can potentially be reintegrated into the labour market.

13 For more details see Scruggs 2022.

14 Exceptions provided by Danforth 2014 and Ferragina/Seeleib-Kaiser/Spreckelsen 2015.

15 There were four missing values which had to be imputed: For the Netherlands, there were no regulations for the years 1985 and 1990 to construct the conditionality index (see Knotz/Nelson 2019 Fn1). Those values were imputed. For Switzerland, there is a missing value for childcare spending in 1985. The value was imputed by using the growth rate of the consecutive period. For Austria, in 2005, the job protection is shorter as paid maternity leave, which is why this case was coded as 0.

16 In the presented cluster solution, Sweden and Japan in the year 2010 were excluded from the cluster analysis, as they provided extreme outlier. However, those cases are discussed in the section trajectories.

17 To find the optimal number of clusters, three methods were used: the average silhouette method (Rousseeuw 1987), the elbow method, using the within-cluster sum of square (WSS), and the gap statistic method (Tibshirani/Walther/Hastie 2001). All three are common methods to identify the optimal number of clusters and all three suggested the same number of clusters as optimal here. To solve the problem of optimal starting points for the KCA, randomly drawn multiple starting points were used. Further analysis is available upon request.

18 Well-paid leave has risen mainly from 2005 onwards and paternal leave also became relevant from 2000 in the median and 1995 in the 25th percentile.

19 The change in the median can partly be attributed to the change in the time series.

20 Results of the ANOVA showed that clusters are, overall, significantly different from each other on each indicator. Detailed results may be provided upon request.

21 The periods are not explicitly named if countries are in one cluster in all points in time.

22 "Germany, for instance, has abolished a provision that permitted claimants to limit their availability in 1997" (Knotz, 2018, 6). Hartz reforms implemented between 2003 and 2005 plays a subordinate role, as the index focuses more strongly on unemployment insurance (ALGI) and not on welfare benefits (ALGII).