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Working paper

A transnational typology of public services with respect to vulnerable people's experiences

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1. Introduction

This report contributes to the welfare typologies literature in three main ways. First, it proposes a typology of social policies and affiliated programs across policy domains – ranging from education and employment policies to housing and health policies. Second, the proposed typology also spans across countries, or “worlds of welfare” (Esping-Andersen 1990), using data from eight European countries (Belgium, France, Germany, Ireland, Italy, Poland, Portugal and Switzerland). Finally, its originality stems from its focus on the users’ experience rather than just on policy designs.

To develop this typology, we confront the normative principles that guide institutions’ workings to their effective outcomes in beneficiaries’ lived experience. To do so, we theoretically draw on the capability approach (Nussbaum and Sen, 1993), and empirically on dedicated field work conducted in the Involve project. Sen’s (2009) definition of capability as the different ways of being and doing available to an individual, invites us to question not only what an institution provides and how, but also how it considers its users. Following Bonvin and Laruffa’s (2018) refinement of the capability approach, we consider social beneficiaries not merely as receivers of social support (whether material, symbolic or relational) or doers (who contribute to shape their life and society through different contributions such as their work), but also as judges able to contribute to defining what is good for them and for society at large.

Empirically, the typology is based on case studies, grounded for each of them in policy document analysis and fifteen interviews with beneficiaries, dedicated to explore their experience with the institution. The focus is more specifically on vulnerable people’s experience of social institutions. As a general framework for addressing vulnerability, we draw on Nussbaum (2006) who considers it as a common experience of human beings – think, for example, of vulnerability to death or illness. However, all human beings do not face the same kind of vulnerability, not at the same stage of their life and not in the same way. Therefore, it is heuristically helpful to refine this large definition of vulnerability by zooming into specific experiences of inequalities, injustice or discrimination that prevent individuals from accessing the resources necessary for autonomous action (Ferrarese, 2016).

To dig into different experiences of vulnerability and how social institutions deal with them, different populations have been targeted in the Involve project: young people with basic income in Germany; migrant women in France; homeless lone mothers in Ireland; people with mental health problems or substance addiction in Italy; care workers with precarious work contracts in Poland; young people part of ethnic minorities in Portugal; young people who are in or went through a work integration program in Switzerland, and people working in four activation centres (social restaurant, gardening service, painting workshop, bicycle repair shop) in Belgium.

Despite the diversity of these categories, they present several points of intersection related to the kind of inequalities people are subject to: these inequalities concern gender, age, belonging to an ethnic minority, poor access to employment and low level of education. The overlaps also stem from the four public services areas under study (education, employment, housing, health), two of them being addressed in each country.

Drawing on the capability approach, we define three ideal-types of institutions based on how they primarily identify their beneficiaries – as receivers, doers, or judges – and on the interplay between these roles and how beneficiaries experience them: the Basic Needs Institution, the Adaptive Institution and the Capability-Enhancing Institution. These ideal-types are original in that they result

(from an iterative process between our theoretical framework and empirical investigations focusing on people's experiences. They give due consideration to individuals' lived experience of social services alongside the normative principles that frame institutions.

In a first part, we present an overview of existing welfare state typologies and suggest how a RDJ-based typology departs from them. In a second part, we specify the RDJ typological criteria we use, before presenting in a third part the three ideal-types, with two sub-types for each of them. Finally in a last part we illustrate our typology by drawing on Involve case studies.

This document is a step forward in the process of co-construction and co-analysis between NGOs and research teams within the INVOLVE project. Drafted by researchers based on the empirical qualitative data produced by NGOs and research teams on the basis of shared and co-constructed tools of inquiry and analysis (see theoretical and methodological reports of the Involve project), the document will be discussed with all the members of the consortium during a webinar scheduled on 7th October 2025. It will then be amended and redrafted according to the outcomes of the discussion.

2. Existing typologies in the literature on the welfare state and social services

The literature on welfare typologies is incredibly vast – for reviews see, for example: Ferragina and Seeleib-Kaiser, 2011; Powell, Yörük and Bargu, 2020 – and thus extremely difficult to summarize. Already in the late 1990s, Peter Abrahamson argued that developing welfare typologies had become a whole academic industry – what he called the “welfare modelling business” (Abrahamson, 1999). Of course, a discussion on typology in the field of welfare state and social policies must necessarily start with Esping-Andersen’s pathbreaking work. While his typology is not the first classification of welfare states (Titmuss, for example, developed his own one in the early 1970s), Esping-Andersen’s “three worlds of welfare” was hugely influential, inspiring comparative social policy research for over thirty years (Esping-Andersen, 1990). In his book, Esping-Andersen identified three welfare regimes, classifying different countries into clusters on the basis of some key theoretical concepts and their empirical operationalization. The concept of *decommodification* refers to the degree to which individuals and families can uphold a socially accepted standard of living independently of market participation. Decommodification was operationalized using several indicators (eligibility rules and levels of income-replacement cash benefits) with a view to mapping social policy generosity and the degree of protection against three key social risks: unemployment, sickness and old age. The concept of social stratification acknowledges that the welfare state itself actively structures the social order (and especially class inequalities). This dimension thus interrogates the extent to which welfare institutions reinforce or mitigate inequalities emerging in the market, e.g. to what extent they are oriented towards means-tested poverty relief, status-maintenance, or universal coverage and equality. According to these different criteria, it is possible to identify three main categories, which – connecting them to the underlying political ideologies – are called the liberal regime, the conservative-corporatist Christian democratic regime and the social democratic regime.

2.1. Critiques and extensions of Esping-Andersen’s approach

2.1.1. Methodological issues

Esping-Andersen’s typology was widely criticized from several angles and his approach has been refined and extended, e.g. applied to other countries or policy fields. A first set of critiques focused on methodological issues and on how Esping-Andersen grouped (or neglected) countries, which sometimes lead scholars to propose alternative classifications. For example, a Mediterranean

welfare model in Southern Europe has been proposed, in which the family assumes a key role in the provision of welfare and which is characterized by informality and – because of the presence of clientelism – by inequalities in accessing welfare (Ferrera, 1996). The former communist countries of Central and Eastern Europe have also been included in later analyses (Fenger, 2007). Moreover, scholars have extended the idea of welfare regimes to other countries beyond the Global North (Holliday, 2000; Gough, Wood and et al, 2004; Lee and Ku, 2007). However, this work is relevant also for theorizing welfare states in Europe, especially as it sheds light on the role of informal welfare provision, which remains important also in industrialized countries. This insight is thus connected to works looking at the role of community in providing welfare – more or less effectively and more or less formally – and on the relationship between formal and informal welfare provision (Mumtaz, 2022, 2023; Mumtaz and Kühner, 2025).

From a methodological viewpoint, Esping-Andersen's approach can also be criticized for being based exclusively on legal entitlements and on the institutional design of welfare policies rather than on their outcomes. On this basis, scholars have looked at welfare typologies from the perspective of outcomes, using microdata on households' resources (Kammer, Niehues and Peichl, 2012). Others have examined variations across welfare regimes in terms of social inclusion/exclusion, poverty and economic vulnerability (Ogg, 2005; Whelan and Maître, 2010; Brown and Brik, 2024). From a different perspective, Bonoli has taken issue with the fact that Esping-Andersen's approach neglects whether welfare state is financed through insurance-based social contributions (as in the Bismarckian model) or through general taxation (as in the Beveridgean model) and he has proposed his own typology, based on two dimensions and four types (Bonoli, 1997). Another very influential classification is the one proposed by Korpi and Palme, in which they also put forward the famous "paradox of redistribution": the more social policies target resources exclusively at the poor, the less redistribution is achieved, i.e. the less income inequality and poverty are reduced (Korpi and Palme, 1998). Scholars have also proposed ways to improve the operationalization of decommodification and the measurement of social policy generosity. In this context, particularly important appears the work by Lyle Scruggs on welfare state generosity, which entails a new decommodification index (Scruggs, 2006; Scruggs and Allan, 2006; Scruggs and Ramalho Tafoya, 2022).

A key critique concerns Esping-Andersen's narrow focus on cash benefits, which thus completely neglects the direct delivery of services – such as healthcare and education – that constitute a central component of the welfare state. Considering service delivery is also important in terms of welfare typologies, as the provision of services may not align with the distribution of cash benefits (Bambra, 2005). For example, while the UK can be considered characterized by a liberal welfare regime if one focuses on cash benefits, its state-dominated universal healthcare system clearly follows a different logic. Thus, welfare states differ not only in terms of the degree of decommodification involved in cash benefits but also in the degree of decommodification inherent to service provision – and it cannot be assumed that a country's approach to the dimension of welfare provision can be generalized to explain all others (Bambra, 2005). A number of scholars has filled this gap, proposing typologies of social welfare services (Alber, 1995; Anttonen and Sipilä, 1996; Stoy, 2014) and clustering countries taking into account both cash benefits and in kind benefits through service provision (Kautto, 2002; Jensen, 2008); developing typologies of welfare and education systems (Allmendinger and Leibfried, 2003; Willemse and de Beer, 2012; West and Nikolai, 2013) and of healthcare systems (Bambra, 2005; Wendt, 2009).

2.1.2. The feminist critique

One of the most important critiques to Esping-Andersen's typology has been developed by feminist scholars (Lewis, 1992; Orloff, 1993, 2009; O'Connor, 1993; Sainsbury, 1994, 1999; Daly and Lewis, 2000). According to this critique, Esping-Andersen's focus on decommodification – and thus on the work-welfare nexus and the state-market interaction – neglects the role of the family in providing welfare, and especially the role of women in providing care on an unpaid basis, thereby also overlooking other forms of inequalities beyond those linked to class. Indeed, the focus on the degree of protection of workers from market dependence obscures other types of dependences (such as personal dependence within the family) that may undermine personal autonomy.

In this perspective, it is acknowledged that the welfare state has not only an impact on class relations and class inequalities but that it also structures gender relations and inequalities. The analytical focus then is shifted towards the analysis of state-market-family relations (rather than only state-market relations), while considering the effects of the welfare state on gender, especially in terms of the treatment of paid and unpaid labour. The focus on decommodification is criticized for implicit assumptions about the sexual division of care work – sometimes labelled as the male breadwinner model – and for ignoring the different effects on men and women of welfare benefits. Scholars also criticize the absence of family policies in Esping-Andersen's account of the welfare state. This effort to gender the theory of welfare regime foregrounds care as an analytical category, interrogating for example how care responsibilities are distributed across institutions (state, market, family and community) and thus also giving more importance to the service dimension of the welfare state.

The feminist critique has opened an entire new field, with scholars developing typologies based on the notions of “varieties of familism” (Leitner, 2003; Saraceno, 2016); “care regimes” (Bettio and Plantenga, 2004); “intergenerational” regimes (Saraceno and Keck, 2010); “family care regimes” (Frericks, Jensen and Pfau-Effinger, 2014) – while trying to capture the interplay between class and gender inequalities across different welfare regimes (Korpi, 2000). Scholars have also looked at the interactions and tensions between family-supportive policies and women's employment (Stier, Lewin-Epstein and Braun, 2001; Ciccio and Sainsbury, 2018), whereby the distinction between “gender equalising” and “gender neutral” social policies appears especially important (Frericks, 2012). From the perspective of political theory, Nancy Fraser has identified four ideal-types: male breadwinner, caregiver parity, universal breadwinner, and universal caregiver (Fraser, 1997). On this basis, scholars have applied this typology empirically, for example using fuzzy-set methodologies (Ciccio and Verloo, 2012; Ciccio and Bleijenbergh, 2014).

In trying to address some of these critiques, Esping-Andersen proposed a new typology, which – perhaps most importantly – recognizes more explicitly the role of the family in providing welfare and acknowledges as well the centrality of family policies in welfare states (Esping-Andersen, 1999). Thus, building on feminist scholarship, he added the concept of defamilialization for describing policies that lessen individuals' reliance on the family, maximizing individuals' command of economic resources independently of familial reciprocities. Defamilialization also refers to the extent that families' caring responsibilities are relaxed by either state or market provision of services.

The concept of defamilialization is widely used in comparative social policy (Bambra, 2007; Lohmann and Zagel, 2016). However, it has been increasingly criticized from different perspectives (Zagel and Lohmann, 2021). In particular, Saxonberg has criticized welfare typologies based on the concept of defamilialization – and those including outcomes – calling for focusing only on

policies aimed at “degenderization”, i.e. those aimed at eliminating gender roles (Saxonberg, 2013). In response, Kurowska has argued that defamilialization and degenderization provide two complementary (rather than mutually exclusive) perspectives and that we need to focus both on policies and outcomes for studying and classifying welfare states (Kurowska, 2018). She proposes to use Sen’s capability approach to holistically articulate defamilialization and degenderization, while including both policies and outcomes into the analysis. The key question then becomes how social policies help (or hinder) both men and women to live lives they have reason to value – while insuring the realization of children’s rights. In the same vein, a number of scholars has applied the capability approach to work/life balance policies and gender equality (Lewis and Giullari, 2005; Fahlén, 2013; Hobson, 2013), focusing for example on childcare services (Yerkes and Javornik, 2019) and parental leaves (Matysova, 2025).

One of the key contributions of the feminist literature is to show the relevance not only of policies but also of cultural norms – and of the interaction between norms and policies – in shaping policy outcomes. For example, social expectations on what it means to be a good mother may prevent women to use childcare services even if these are available. Thus, when it comes to explain international variation in welfare provision, it seems important to consider not only institutions and constellation of actors, but also the role played by culture and values (Pfau-Effinger, 2005a, 2005b). From a capability perspective, these norms can be theorized in terms of conversion factors that help (or hinder) the transformation of formal rights into real rights. In this context, the concept of “sense of entitlement” has also been put forward by scholars working on the topics of work/life balance and gender equality from a capability perspective (Hobson, Fahlén and Takács, 2011; Hobson, 2013, 2018). This concept is important for our project, as it is clearly related to the one of capability to aspire on which we focus.

2.1.3. Other applications and extensions

Since welfare regimes are not set in stone, scholars have also looked at how regimes (in terms of policies and/or outcomes) evolve over time (Danforth, 2014; Ferragina, Seeleib-Kaiser and Spreckelsen, 2015). There is also evidence of some convergence, with processes such as marketization, re-commodification and welfare retrenchment involving all countries. But processes of “recalibration” are also important, as the rise of “new social risks” has driven the expansion of social policy in new fields (Taylor-Gooby, 2004; Bonoli, 2005; Hemerijck, 2013). The expansion of family policy is especially visible, even if this too possibly follows a re-commodification logic (Ferragina, 2019). Against the background of emerging new social risks and de-industrialization, scholars have highlighted the crisis of the Bismarckian model (Palier, 2010), the deepening of “dualization” dynamics (Emmenegger et al., 2012) and the rise of a “new welfare state” informed by the “social investment” approach for knowledge-based economies (Esping-Andersen, 2002; Morel, Palier and Palme, 2012; Hemerijck, 2013, 2018; Hemerijck, Ronchi and Plavgo, 2023). In this context, scholars have also developed typologies of activation policies, discussing for example work-first and more enabling, human capital oriented versions (Barbier and Ludwig-Mayerhofer, 2004; Levy, 2004; Dean, 2007; Lindsay, McQuaid and Dutton, 2007; Dinan, 2019).

Some scholars have also integrated welfare typologies with the “varieties of capitalism” perspective (Hall and Soskice, 2001) in order to get a more holistic picture of the national variation in social policies (Schröder, 2009; Buhr and Stoy, 2015). While Esping-Andersen’s approach is inscribed in the power resource tradition, whereby welfare state development is explained mainly with reference

to the strength of the labour movement (trade unions and social democratic parties) – see also: Korpi, 1983; Esping-Andersen, 1985 – the varieties of capitalism perspective adopts a functionalist explanation. So, for example, generous unemployment benefits constitute a form of insurance for workers who are required to make investments in specific skills – which are useful in the specialized, high quality industries of manufactory-oriented coordinated market economies – whereas workers in service-oriented liberal economies who lose their job can more easily use their general skills with another employer. With the rise of the literature on "growth models" – which challenges the varieties of capitalism perspective, assigning a key role to the demand rather than the supply side (Baccaro and Pontusson, 2016; Baccaro, Blyth and Pontusson, 2022) – there have been also attempts to connect the growth regime and the welfare regime literatures (Hassel and Palier, 2023).

Many studies have also tried to understand whether welfare regime typologies can explain variations in public opinion and attitudes (such as public support of the welfare state and redistribution) across nations (Svallfors, 1997; Jæger, 2006, 2009; Jakobsen, 2011; Kudrnáč and Petrušek, 2022). This connects to the broader literature on policy feedback, whereby social policies and welfare reform are shown to have an impact on citizens' political preferences (Kumlin and Stadelmann-Steffen, 2014). Moreover, some studies have also attempted to include the ecological dimension, exploring the existence of post-productivist (Goodin, 2001) and eco-social regimes (Koch and Fritz, 2014; Zimmermann and Graziano, 2020).

The theory of welfare regime has also been applied to specific populations, such as disabled people (O'Brien, 2015; Tschanz and Staub, 2017; Hadjar and Kotitschke, 2021; Gugushvili et al., 2023) and homeless people (Stephens and Fitzpatrick, 2007; Benjaminsen and Andrade, 2015). For example, scholars have shown that countries differ in how they accord social rights to young people and how they facilitate (or hinder) young people's access to the labour market. Scholars have thus developed typologies of "youth unemployment regimes" (Cinalli and Giugni, 2013) and of "youth welfare citizenship" (Chevalier, 2016). In particular, young people's access to social welfare can be "familialized" (as in Bismarckian welfare states), when young people are considered as children and therefore do not receive state benefits in their own name or social citizenship can be "individualized" (Beveridgean welfare states), in which case young people can be entitled to benefits in their own right, insofar as they are considered as adults (Chevalier, 2016, 2018). Importantly for the Involve project, these youth welfare citizenship regimes seem to have an impact on young people's political trust (Chevalier, 2019).

Specific problems arise for migrants, who often lack access to welfare rights, especially those that are attached to citizenship. Welfare states are based on solidarity, which is often limited to people of the same nationality, excluding "outsiders". In the literature on the welfare state the problem of "welfare chauvinism" has attracted a lot of attention (Reeskens and van Oorschot, 2012; Careja and Harris, 2022). From this perspective, racial prejudices are one of the main explanations for the fact that the welfare state in multiracial United States is much less generous than in more homogenous European countries (Quadagno, 1996) – and the increasing ethnic diversity in Europe is possibly eroding support for generous social policies as well (Alesina and Glaeser, 2004).

2.2. What is the point of welfare typologies after all?

At a more fundamental level, Kasza (2002) has interrogated the soundness of the concept of welfare regimes itself. According to this argument, the notion of welfare regime is flawed because it is based on two wrong assumptions: 1) that all the most important social policy areas within a certain welfare regime reflect the same approach to public welfare and 2) that this coherence in policymaking is guaranteed by reference to a specific set of principles or values (Kasza, 2002). However, rather than policy coherence, welfare regimes are characterized by high degrees of internal heterogeneity, i.e. different areas of social policies respond to different logics and goals. Thus, the concept of welfare regime as a coherent package of social policies inspired by common principles should be rejected: governments implement isolated or even contradictory social policies across different areas of welfare provision. Hence, the problem is not only that each policy changes over time, but also that each policy has its own history, largely independent of other policies in different areas. This is because – among other reasons – each social policy area is characterized by different actors and by different policymaking processes. International exchanges also play a key role, as each country can borrow ideas and practices from abroad. One solution that Kasza advances to overcome these problems is to focus comparative research only on specific policies. Perhaps a further problem for comparative research across national regimes is the importance of the local level, especially as cities, regions and municipalities are in many countries responsible for implementing key social policies – and indeed some studies compare local welfare policies (Johansson and Panican, 2016).

Connected to this deeper scepticism on the existence of welfare regimes, there is a whole debate on whether Esping-Andersen worked with “ideal-types” or “real types” (Arts and Gelissen, 2002; Aspalter, 2011, 2019; Ferragina and Seeleib-Kaiser, 2011; Powell and Barrientos, 2011; Rice, 2013; van Kersbergen and Vis, 2015). However, in a recent contribution, it has been argued that this discussion is largely misleading, as both the concept of “ideal-type” and of “real-type” are ambiguous (Höppner, 2025). Following van Kersbergen and Vis (2015), an ideal-type is a theoretical construct to which empirical cases can more or less correspond. Thus, an ideal-typical analysis aims to assess the extent to which an empirical case fits the theoretical ideal. In contrast, a typology aims to classify empirical cases, whereby each empirical case either belongs to a type or not. According to Höppner (2025), in order to create a theoretically informed country classification it is not necessary to use an ideal-type analysis and a gradual assessment of cases: researchers do not need to call their analysis ideal-typical just for emphasizing its theoretical foundations, as they run the risk of being accused of not doing “real” ideal-type analysis (Höppner, 2025, p. 5583). When developing new typologies researchers should ask themselves the following questions:

If I work deductively, should only the dimensions be based on theory or also the types? If the latter is the case, do I want to measure cases using the types as a reference or do I want to cluster cases? What is the character of the attributes and which methods can I use to create the typology? (Höppner, 2025, p. 5583).

Considering the huge literature on welfare typologies, one is sometimes left wondering about the final goal of all these efforts. What is then the purpose of developing welfare typologies after all? Perhaps a useful starting point is to recognize, as many scholars cited here have done, that – more than evaluating the empirical validity of existing typologies or debating whether a specific country better fits within one type or the other – we need to reflect in terms of welfare state theory and thus on the analytical concepts that we use to theorize welfare states. In other words, typologies are

(important to the extent that they encourage researchers to think about what is relevant in welfare states (and welfare state change) – and thus eventually to find ways of measuring these relevant dimensions.

Accordingly, we shift away from a conception of welfare regimes to elaborate a cross-country and cross-policy typology of social policy. Drawing on critics of Esping-Andersen's typology, our contribution takes into account various forms of social policies (related to health, employment, housing, etc.) while focusing on users' experience of institutional arrangements – and the outcomes of the latter – rather than on a sole comparison of policy designs. The following section presents the criteria we use to differentiate lived experiences of institutions.

(

3. Typological criteria

In order to compose this cross-policy domain, cross-country and users' experience-based typology, we draw on the capability approach-inspired receiver-doer-judge framework (Bonvin et Laruffa 2018). According to the latter, users of social policy should not merely be considered as passive receivers of material, symbolic or relational support, but also as doers, i.e. as actors who are willing and able to shape their environment and contribute to society, and as judges, i.e. as reflexive beings who have legitimate ideas and aspirations which should be taken into account when designing and delivering the policy. In order to truly develop users' actual freedom to live a life they value – i.e. their capabilities –, institutions should consider all three dimensions: the receiver, the doer and the judge.

Departing from users' speeches about their experiences of the various institutions they have been in contact with, we identify a set of criteria for each one, i.e. the receiver, the doer and the judge dimension, that indicates whether said institution either fosters (R+, D+, J+), hinders (R-, D-, J-) or simply does not take into account (R \emptyset , D \emptyset , J \emptyset) each of the three dimensions. In complement to users' speeches, we also look at policies and program formal design and characteristics to situate them as regards their treatment of the receiver, doer and judge dimensions. In the following, we go through the determining criteria for each dimension.

3.1. Receiver dimension

The capability approach posits that individuals should be considered as inherently vulnerable and, therefore, in need of some form of support at various stages of their life. This is most evident during the early and late stages of life, but it should also be acknowledged throughout the intervening years, when a wide range of risks — such as injury, unemployment, or illness — can materialize and affect anyone. In contemporary western societies, public and private institutions play a primary role in supplying this support.

Such support can be of various natures, all of which we consider when determining the degree to which an institution takes into account the receiver dimension. First, the support an institution provides can be material – either financial or in kind. This would typically be the case of means-tested financial benefits. Then, the support can be aimed at improving physical or psychological well-being. When it comes to an institution providing support in this sense, one would typically think of hospitals or other sanitary institutions. Psychological well-being related programs also encompass, for example, school counselling services or more relational measures such as home visit programs for seniors. Some programs and measures can also foster psychological well-being simply by being welcoming and making users feel accepted and respected while in contact with them. We also take this more indirect kind of support into account. Finally, the support provided by institutions can also be of informational and practical nature. A professional orientation desk would for example offer such kind of relief. Note that some policies and programs offer multiple kinds of support, this could be said of social services who provide a monetary rent while also accompanying and guiding users in different ways.

In our typology, to be deemed an “R+” institution, programs should fulfill what was expected from them by their users in terms of material, well-being or practical support. Perception by users is here key: providing financial support is, for example, not sufficient to be deemed “material R+” if the amount and duration provided are considered by users as too scarce to meet their needs. In such a case, the program is marked “material R-”. That would also be the case if a social service user in need of financial support does not get any from said service because such kind of support is not included in the design of the scheme. Finally, if a program does not provide material support while not being expected to – for example, a school counseling service – here, the service is marked “material Rø”. Note that programs can combine various perceptions of the sub-dimensions related to the receiver. For example, the aforementioned service which does not provide enough financial support (“material R-”), might at the same time offer emotional support deemed satisfying by users, and thus be marked “well-being R+” as well. Also note that for all these kinds of relief, the issue of accessibility to the program or service is crucial. Whether searching for material, physical or psychological well-being related or practical support, the degree to which the person struggles to access and navigate the program due to its relative complexity – potentially leading to situations of temporary or even permanent non-take-up (van Oorschot, 1995) – will affect their experience, and therefore whether we mark it with R+ or R-.

Hence, for each policy and program under scrutiny, we assess, based on their users’ speech and the program design, whether each sub-dimension (material, well-being, practical) is perceived as giving proper (R+), insufficient or counterproductive (R-), or no (Rø) consideration to the receiver dimension. To do so, on top of the matching between users’ needs and what the program offers, we pay close attention to elements such as the level of conditionality and complexity to access the benefit; potential mechanisms of sanctions reducing the level of support; or discriminatory dynamics in the allocation of benefits. These elements are summed up in the table below.

RECEIVER								
Material			Well-being			Practical		
R+	R-	Rø	R+	R-	Rø	R+	R-	Rø
Material support fits needs	Material support does not fit needs	No material support	Well-being related support fits needs	Well-being related support does not fit needs	No well-being related support	Practical support fits needs	Practical support does not fit needs	No practical support

3.2. Doer dimension

In addition to intrinsically being receivers, individuals also need, in order to flourish, to contribute to activities they have reason to value. This can materialize in salaried employment, but not exclusively. Among other common meaningful ways to be a doer, one could mention taking care of one’s family or participating in civic life. Some of the activities individuals aspire to require a certain set of skills and qualifications, and social policy can play a role in facilitating access to them. This

would for example be the case of an activation program designed to increase beneficiaries' human capital (Becker, 1964). Yet developing users' human capital is just halfway towards recognizing their doer dimension, the other half being making options they value available when it comes to exerting their agency.

Hence, to be considered a "D+" institution in our typology, a program should match its users' expectations in terms of agency development and deployment. This can be done through human capital enhancement – what we coin "individual-centered agency D+" – or through making activities valued by the user practicable, what we mark "environment-centered agency D+". To use a labor market analogy, one could say that the former, by enhancing users' skills and knowledge, acts on the supply side, while the latter, by rendering valuable options available, works on the demand side. Therefore, an "environment-centered agency D+" policy or program can not only offer valued options within the program, but also beyond the program – notably related to the labor market. On the negative side, a program which is inefficient in its goal of teaching skills and knowledge is considered "individual-centered agency D-", and a program with few options as regards what is considered feasible and legitimate in terms of aspirations – and therefore tends to be at odds with users' preferences – is marked with "environment-centered agency D-". Finally, programs which do nothing related to agency development, whether in terms of human capital development or options available are coined respectively "individual-centered agency Dø" and "environment-centered agency Dø". Just like what we saw for the receiver dimension, sub-dimensions of the doer are not mutually exclusive and can theoretically combine in all ways possible. For example, a scheme could be "individual-centered agency D+" and "environment-centered agency D+" as well if it efficiently teaches valuable skills and offers a wider range of options to put them into practice; or a scheme could be "individual-centered agency D-" and "environment-centered agency D+" if it allows many options but does not put in the means to actually train users to perform them.

In order to determine whether the program at hand effectively develops its users' doer dimension by allowing them to become actors in fields they value, we therefore pay close attention to the kind of activity which is supported or not by the institution and to what degree. Does the policy/program make possible to pursue non-productive activities? Is the doer mostly conceived as a matter of adapting individuals to the labor market (supply side) or is there also an action on the environment (demand side)? These elements are summarized in the table below.

DOER					
Individual-centered agency			Environment-centered agency		
D+	D-	Dø	D+	D-	Dø
Efficient skills and knowledge development	Inefficient skills and knowledge development	No skills and knowledge development	Broad scope of opportunities	Restricted conception of legitimate activities	No consideration for agency

3.3. Judge dimension

Finally, a capability enhancing institution should also encourage its users' ability to choose among different options and allow them to take part in the formation and implementation of policies and programs. Among existing social policies, this dimension is the most rarely considered among the three, as most programs are designed and implemented in a top-down fashion.

In the construction of our typology, we take two sub-dimensions of the judge into account. First, we look at whether users have a say in the design, organization, and content of the scheme ("voice within J+/J-/Jø"). A situation where targeted publics substantially contribute to the elaboration of the scheme is expected to be a rare case scenario; cases of merely formal – or tokenistic (Arnstein, 1969) –, or plainly non-existent participation at this level being the norm. More salient is the degree to which individuals get to freely choose, or not, key aspects of their participation in a program. A "voice within J+" institution is for example an activation program where the user freely chooses the domain in which to train, while a "voice within J-" is a case in which participants do not have a say about the content of the program. Finally, a "voice within Jø" is for cases where the issue of choice related to a scheme or program is irrelevant and therefore does not apply (ex: means-tested cash benefits). The "voice within J+/J-/Jø" relates to the "environment centered D+/D-/Dø" seen above but differs in the sense that what is key for the latter is the number and value of options available, whereas, in the case of "voice within J+/J-/Jø", it is rather the degree of freedom to choose between these options.

Concerning this dimension, the elements that we take a close look at are whether people have a say on the (co-)establishment of the content of programs and services and how: is their voices promoted at the level of the formulation/design and/or the level of implementation and evaluation of the policy? Is the role of participation merely informative/consultative or does it directly influence decisions? What is negotiable/disputable within public services and what is not? We also pay attention at how inclusive participation effectively is: who does participate and who does not? We are also interested in understanding the reasons behind the promotion of participation: is participation promoted for efficiency reasons (e.g. reducing costs) or for epistemic reasons (i.e. using citizens' knowledge for better design and delivery)? Finally, we want to evaluate the impact of participation on the content and the modalities of service provision.

Secondly, as regards the judge dimension, we not only look at whether participants' ideas and preferences are taken into account within the program, but also if the latter develops users' sensitivity and qualification related to civic and political matters beyond the program; and therefore, tends to increase their political engagement. A program that does so is coined "voice beyond J+", one that decreases users' trust in institutions and in those at the political level who designed them and tends to decrease political participation is marked with "voice beyond J-". One where no relevant observation in this sense could be made is coined "voice beyond Jø".

The question we ask ourselves when assessing these elements typically are: do more generous policies (in terms of the receiver and the doer dimensions) foster greater political participation and/or trust? Do more participatory forms of public services and policymaking enhance citizens' trust in politics and their political engagement? Do social policies and public services help build citizens' "capability to aspire"—that is, their ability to envision more emancipatory personal or collective futures? Or, conversely, do they push individuals to adjust their aspirations downward (adaptive preferences) in response to the tough realities of a competitive and exclusionary

environment (ex: employment or access to housing)? We summarize these elements on the table below.

JUDGE					
Voice within program			Voice beyond program		
J+	J-	Jø	J+	J-	Jø
Encourage participation within the program	Top-down predefined content	Irrelevant to the case	Program fosters trust in institutions and participation	Program discourages trust in institutions and participation	Irrelevant to the case

In the next chapter, we show how the analysis of a wide scope of social policies across domains and countries using the criteria presented above to assess their conceptions of the receiver, doer and judge dimensions resulted in the identification of three main ideal-types: the basic needs institution, the adaptive institution and the capability-enhancing institution.

4. Three RDJ-based ideal-types

We identified three main ideal-types, each characterized by a specific combination of the way institutions address the receiver (R), the doer (D) and judge (J) dimensions. The first one is the Basic Needs Institution, which emphasises the receiver dimension. The second one is the Adaptive Institution, which mainly focuses on a specific conception of the doer dimension. Finally, the Capability-Enhancing Institution gives comparatively more weight to the judge dimension. For each type, we identified two sub-types that reflect nuances in institutional approaches to the receiver, doer and judge dimensions. By focusing on individuals' lived experience and examining the dynamics generated by each configuration we highlight their potential effects, the risks they may entail and how they may evolve into new configurations over time. These dynamics, made tangible through people's experience of the programs, are addressed for each type in a section on potential drifts. This section also addresses two transversal dimensions frequently raised in interviews: bureaucracy and control.

Although these ideal-types do not correspond directly to real-world institutions, they resonate with familiar logics to be found across public policies, such as assistance, activation or participation logics. Although well documented in social policy literature, these logics are not fully taken into account when drawing typologies. Our typology places the role assigned to individuals by such institutional logics central stage, as well as their effects revealed through individuals' experience.

Finally, while the proposed types are designed to characterize institutions, it is important to remember that programs and policies always operate within a broader configuration of institutions that are constantly in interaction with one another. Therefore, if a given role is not fulfilled by one institution, it may still be addressed by another.

4.1. The Basic Need Institution: Addressing vulnerability at the expense of agency and voice

The Basic Need Institution emphasizes the vulnerable individual, primarily positioning him as a receiver of support. It corresponds to configurations where vulnerability is addressed by distributing various forms of resources, which are generally not convertible within the institution itself into capabilities — understood as the individual's real freedom to voice what they value, and to act accordingly. In this configuration, the receiver remains a passive subject of support, without being empowered as a doer or a judge.

The Basic Need Institution can provide different types of support: material support (often financial, but also in-kind aid such as food, clothing, or shelter); psychological or physical support (promoting individual well-being, such as healthcare, sport activities); potentially symbolic or relational support; and practical assistance (e.g., orientation within a complex welfare system or support with literacy and administrative procedures). R+ configurations may specialize in one of these forms of support or combine them. In all cases, the institution provides resources considered essential for survival or dignity. In practice, this type of institution corresponds to various forms of assistance, provided either by public institutions, NGOs, or philanthropic and charitable organizations.

Vulnerability, which can be considered as a universal condition of human beings (Nussbaum, 2006) is central to the role of receiver. We approach it through the concept of 'need' rather than the one of 'risk,' that Esping-Andersen (1990) uses in his typology of the three main risks (unemployment, illness and old age) against which welfare states protect their citizens. Departing from Esping-Andersen's top-down approach, we confront the ways by which institutions define needs with individuals' subjective experience of deprivation. Beyond the objectivation of needs based on standardised institutional design and measurement scales, we address needs as anchored in the lived experience of structural injustice. Thus, need can refer to a broad and non-exclusive set of criteria, identified via general categorizations (e.g., income level, employment status, administrative status, household composition, age, gender, race, social position), but also to situational and experiential identifications as reported through detailed individual assessments. The question then turns to be: What does a given individual really need, can she really access the resources provided by the institution, and has she the means to convert them into realisations she has reason to value?

In the Basic Need Institution, individuals are not recognized as judges capable of assessing their own needs or evaluating how institutions should be shaped to best respond to these needs. They are not invited to participate in defining the social categories recognised to be supported, often under the assumption that their vulnerability makes them unable to contribute to such debates.

According to the distinction to be found in the literature on welfare states between a universalist approach and a categorial approach to vulnerability (Korpi and Palme, 1998), we distinguish two sub-types: universal and categorial Basic Needs Institutions. In the universal sub-type, needs are assessed according to universalist principles, acknowledging human beings as intrinsically vulnerable (Nussbaum, 2006). In the categorial type, vulnerability is approached through the lens of different categories that focus on vulnerable populations according to various criteria such as life stage, gender, family structure, income...

These two variations of the Basic Need Institution depend on how the receiver (R+) is defined. Neither of them engages with the doer (D0) and the judge (J0).

4.1.1. The Categorial Institution (R+)

In this sub-type, access to resources is based on eligibility criteria that often require individuals to prove their vulnerability. These criteria reflect the socially constructed rules of distribution, making beneficiaries dependent on the institutional recognition of their vulnerability, without having a say on their actual needs. The criteria are established by policy frameworks, which can restrict individuals' access to support. In Western welfare states, the most common eligibility criteria relate to income, but they can also relate to a person's behaviour or current circumstances, such as their family or housing situation or migration background. Such identity-based criteria are gaining increased significance. On the one hand, they reflect a greater sensitivity to the specific vulnerabilities created by intersectional inequalities. On the other hand, they set out norms conditioning the access to benefits, with respect for example to how to be a 'good' mother or father, or to how beneficiaries should present themselves (e.g. the type of clothes they should wear) or behave. In this context, wearing religious symbols is most often an issue.

4.1.2. The Universal Institution (R++)

This second sub-type operates according to the principle of universality, without requiring individuals to meet specific social or identity-based criteria. In some cases, individuals simply have to request the support they need (for example primary healthcare); in other cases, resources are distributed to the general population regardless of need. This applies to public services that do not discriminate on the basis of social status, such as public schools or subsidized public transport, especially when they are free. Individuals are not required to contribute to or participate in the programme designed for them. Their needs are met independently of their social position or efforts to benefit from the resources. Since the unconditionality of the support characterizes this sub-type, the R is a strong one and can be labelled as R++.

4.1.3. Potential drifts: Reducing access to resources (from R+ to R-)

Some basic need institutions are described by beneficiaries as being highly bureaucratic¹. Excessive formalisation that hinders access to essential resources and depersonalizes interactions between individuals and institutions is incriminated. By contrast, informal or community-based safety nets are seen as being more relational and responsive².

In the categorial sub-type, bureaucratic mechanisms, combined with selectivity requirements, tend to reinforce institutional control, resulting in temporary or permanent exclusion from benefits. Referring back to people's experience, even in basic needs institutions, accessing resources entails agency. Yet, bureaucracy and control contribute to reducing beneficiary's agency, thus producing configurations where the doer is not just ignored (D0), but constrained and obstructed (D-) – such situations are then very similar to those of adaptive institutions described below.

Deservingness often involves expected behaviours or attitudes, pointing towards a behaviour-related form of conditionality that we will explore further in the next section on the adaptive institution. As for now, let us keep in mind that bureaucracy, excessive control and conditionality barriers to access tend to limit the receiver position and generate dynamics of non-take-up. The receiver then derives from R+ towards R-. In turn, the R- can in certain cases produce a negative spiral, R- D- J-, generating frustrations, feelings of non-recognition, and of exclusion from the rest of society.

To sum up, by recognizing the individual as vulnerable, the basic needs institution considers her as a legitimate receiver, but not as a doer or a judge. Due to the asymmetrical nature of the relationships, beneficiaries may feel objectified or diminished, despite benefiting from support. While some may express gratitude, others may feel stigmatized or disempowered. In this way, supportive institutions can also undermine trust and participation. When bureaucratization, conditionality, or external judgment overtake participatory dynamics, individuals may experience negative subjectification, feeling reduced to the category that define them (Hasenfeld, 2000). When people are confronted with problems of access or control, their ability to engage as doer and judge

¹ This is not specific to basic need institutions.

² The case of women's experience in a temporary shelter in Portugal is meaningful in this respect. See section 4.

may be negatively impacted (towards D- and J-), even if these roles are not directly addressed by the ideal-type (Dø and Jø)

4.2. The Adaptive Institution: Agency without voice

The Adaptive Institution places a strong emphasis on the doer dimension, but without involving them as a judge with respect to the activities in which they are expected to engage. The adaptive character of the institution lies in the asymmetry between agency and voice: the individual is called upon to act, not to evaluate, choose or discuss. Thereby, the institution fosters only partial agency, depriving beneficiaries of two intrinsic dimensions of agency: the capability to express what one values and the capability to make it count, i.e. the capability for voice (Bonvin, 2012), and the capability to aspire (Zimmermann, 2024).

The Adaptive Institution directs the doer towards its own predefined objectives. Operating within a logic of human capital development, it prioritises labour market participation based on a prescriptive logic, while disregarding individuals' own aspirations. Even when the prescribed action – such as working or training – seems to align with individuals' aspirations, their content stems from a process of adapting individuals' preferences. This process is shaped by a constraining normative framework leaving no room for individual's free expression. Whether through human capital development (learning and acquiring skills) or through incentives for entrepreneurship, the goals are set from above and primarily designed to meet labour market needs, while individuals' aspirations, motivations and life projects are side-lined.

The scope of the Adaptive Institution is not limited to employment; it also extends to other areas of social life, such as citizenship. Often, individuals are encouraged to participate in civic activities not as an expression of genuine democratic participation, but as a demonstration of their willingness to integrate a given program or society at large. This is particularly true for migrants, who are called to pledge allegiance to the host society, and of welfare beneficiaries, who are required to perform volunteer work to maintain their benefits. In recent years, an injunction to volunteering has emerged in several countries. For instance, in France, recipients of the RSA (active solidarity benefit) must carry out a few hours of volunteer work each week, while in Italy and Switzerland, asylum seekers are encouraged or pressured to participate in community service. These forms of civic engagement blur the line between voluntary participation and unpaid labour. As a consequence, civil society organizations that host such volunteering activities find themselves caught between individuals' genuine desire to contribute and political incentives to exploit this civic involvement as an alternative to public service provision (Simonet, 2010; Aubry, 2019; Sharma, 2008).

Contemporary welfare states use various models of social citizenship activation (Eggers, Garges & Pfau-Effinger, 2019). While some of these models support individuals' autonomy through an active welfare state that provides resources, others minimize public provisions and push individuals to be self-reliant for financing and securing their own training and social protection. This distinction is relevant to distinguish two variations of the Adaptive Institution, depending on the extent to which the receiver (R) — the provision of collective resources — is part of the arrangement. When the institution supports the individual by providing access to collective resources, it takes the form of a Paternalist Institution: R+ D+ J-. Conversely, when it demands action without offering support —

leaving the individual to bear the costs of activation alone — it corresponds to what we label a Responsibilizing Institution: Rø D+ J-.

4.2.1. The Paternalist Institution (R+ D+ J-)

The Paternalist Institution supports vulnerable individuals by directing their behaviour towards objectives that are deemed to be morally legitimate in line with the 'deserving poor' model (van Oorschot, 2000). This normative orientation often finds its roots in religious or community values and goes beyond mere material assistance. Historically central to the development of social welfare, the Paternalist Institution continues to influence contemporary organizations that emphasise community integration and shared values. It can apply to private charity organizations, as well as to third sector organizations and public funded institutions. Traditionally associated with ideologically driven organizations, its logic now permeates also public institutions that implement state policies, albeit in more subtle forms (Clarke & Newman, 1997). These institutions do more than just provide material support. They also develop soft and social skills, seeking to empower people by placing them in active roles within society. They may incorporate moral norms into welfare, promoting a work ethic through moral judgements (Bochsler, 2021) and encouraging a prescriptive vision of proper behaviour. The Paternalist Institution thus works as a socialising force that steers individual choices in different spheres of life, by implicitly or explicitly shaping their preferences and behaviours.

Ultimately, this mode of intervention tends to reinforce unequal power dynamics (Fraser & Gordon, 1994). By imposing behavioural norms without providing genuine space for the expression of dissent and by limiting beneficiaries' capability to articulate preferences and influence decisions, the paternalist institution contributes to dependency relations and, consequently, to the reproduction of inequalities, particularly among the most vulnerable.

4.2.2. The Responsibilizing Institution (Rø D+ J-)

A second variation of the Adaptive Institution is the Responsibilizing Institution. Its defining feature is responsibility without support. It places expectations and imposes goals on people without offering them adequate resources, recognition, or supportive conditions to achieve these goals. The result is a form of prescribed responsibility that lacks any meaningful framework for supporting individuals' agency.

In such contexts, individuals are not approached as persons with needs or vulnerabilities that should be met by public action. They are only recognised for their expected contribution to society, to which they are urged to conform. Institutional action does not operate as a relationship or negotiation, but as a top-down directive: normative compliance takes precedence over recognition of the individual's voice and aspirations. This is often connected to a 'dependency trap' ideological construction (Fraser and Gordon, 1994). In our research, young people and women are specially targeted by such activation devices. Two configurations can characterise the Responsibilizing Institution:

Rø D+ J-: No resources are provided beyond those directly related to the Doer (such as training or tutorship). This is not necessarily due to ideological choice, but rather because needs related to the

individual's family or personal life fall outside the institution's perimeter. While the individual may be recognized as vulnerable, assistance is not within the institutional scope. However, she may receive support from another institution. NGOs who support employment access are for instance in this situation.

R- D+ J-: The institution denies support and disregards vulnerability, but compels individuals to pursue the objectives it sets them. This is the most constraining form of activation, where doing is mandatory, while vulnerability is not acknowledged.

4.2.3. Potential drifts

Considering the subjective experience that individuals make of activation institutions reveals effects that traditional policy analysis often misses. Being forced to accept low-value employment despite other aspirations, deeply affects individuals' capability to aspire, to make sense of their action, and finally to act meaningfully. These aspects cannot be captured by top-down approaches that posit individuals within labour and social categories, regardless of their lived experience.

Control is a core mechanism within the Adaptive Institution, be it in its paternalist or responsabilizing forms. It is often mentioned by vulnerable individuals engaged in reintegration programs. Their efforts to find work are closely monitored, and they are frequently subject to suspicion about their willingness to integrate the labour market, reflected in the requirement to conform to predefined job-seeking trajectories. Likewise, programs that condition welfare support on active job-search behaviour make surveillance of personal conduct – for instance, in matters of consumption choices – a core issue.

Forced civic engagement is also subject to ideological control. Third sector organizations that depend on public funding may thereby lose their independence. In France, these organizations are increasingly criticised for being subject to centralised control (Hély and Simonet, 2023). Bureaucracy plays a key role in this process, trapping subsidised work in an overwhelming maze of paperwork and procedures that prevent these organizations from delivering on their promises regarding labour market integration.

However, it is worth noting that this control is not always perceived negatively. Some young people report that having close guidance or monitoring helps them to stay on track and re-engage with their life goals. For adults, however, this control tends to have counterproductive effects, restricting their freedom and undermining their initiative and ability to set and pursue their own goals. An individual whose freedom of choice is taken away is affected in her agency and is no longer a Doer in the sense of the capability approach. The risk is then a slide from D+ to D-.

In conclusion, by focusing on action while restricting or ignoring individuals' voice, the Adaptive Institution closely aligns with many contemporary activation policies. Rather than supporting individuals as full and autonomous social actors, its primary function is to adapt them to a society that defines goals from above without recognising or fostering their capability to choose, their capability to voice their concerns and what they value, and their capability to aspire.

4.3. The Capability-Enhancing Institution

The Capability-Enhancing Institution is primarily characterized by its emphasis on the judge (J+). It enhances people's capabilities, including their capability for voice and capability to aspire, in interaction with their personal, social, institutional and political environment. By emphasizing individuals' role of judge, it fosters their capability for voice — a key condition for effective participation in deliberations about social policy content and implementation (Bonvin & Laruffa, 2024). It also provides resources for the Receiver, while creating an enabling environment that generates the conditions to transform allocated resources into achievements that people value. This involves two interrelated orientations: on the one hand, supporting the development of individuals' skills and capabilities (individual-centered agency), and on the other hand, transforming the environment to ensure individuals' access to a plurality of meaningful options (environment-centered agency) and to spaces of deliberation about possibly conflicting options. By acknowledging individuals as being both vulnerable (in given situations or at a given point of their life) and capable of discernment and judgement, and by providing resources and generating the conditions for their conversion into valuable achievements, the Capability-Enhancing Institution enables the formation and expression of aspirations, both at an individual and collective level. It turns vulnerability into a lever for strengthening agency and empowers vulnerable individuals to become judges and to carry out a collective voice that can reshape structures of domination.

As Bonvin and Laruffa (2024) observe, many public policies are shaped by managerial logics and imposed on both beneficiaries and street-level bureaucrats, thereby severely limiting vulnerable individuals' capability for voice and capability to aspire. When participation is framed by organizational performance-based expectations, only aligned aspirations are acknowledged, while divergent ones are disregarded. In this configuration, individuals may be formally recognized as judges (J+), yet without real agency, their role being merely consultative. As Stephanus and Vero (2024) argue such schemes may offer the capability to formulate aspirations, but not to experiment or realize them. The Capability-Enhancing Institution departs from such a tokenistic participative scheme where people are allowed to speak, but not to influence decisions or co-construct alternatives.

It invites us to move beyond formal voice and recognition by fostering a genuinely democratic process, whereby individuals are empowered to act and judge according to what they have reason to value. Depending on the scope within which the individual is recognized as a judge, we distinguish two variations of the Capability-Enhancing Institution: a first one supports Voice Within (J+) the institution, a second one additionally supports Voice Beyond (J++) the institution.

4.3.1. Voice Within (J+)

This variation, characterized by R+ D+ J+, supports individuals' freedom to choose or have a voice on key aspects of their participation within the institution, both as receivers and doers. This requires a strong D+, particularly on the environment-centered agency side, in order to make meaningful options available.

Well-designed agency-enhancing programs can embody this logic: they may enable and empower individuals to actively contribute to the co-construction of the programs that concern them. This type of institution becomes responsive by integrating users' participation in the revision of its rules,

objectives, and modes of operation. The experience and feedbacks of the beneficiaries then feed continuous institutional adaptation.

This sub-type also contributes to reinforce individuals' capability to aspire. Its main risk lies in creating a gap between an individual's participation within the institution and her role as a citizen outside. Local initiatives may foster voice in limited contexts but often struggle to foster broader political participation, and to expand the space of possibilities beyond the institutional program and transform the structures that produce vulnerability. Therefore, the risk of preference adaptation remains, insofar as vulnerability is dealt with in a limited public policy area without being politically challenged.

4.3.2. Voice Beyond (J++)

This second variation does not only acknowledge the individual's voice within the institutional perimeter; it also provides the resources, opportunities, and recognition necessary for individuals to play an active role in a democratic society. Such an ideal of democracy within and beyond the institution fosters the capability to both aspire and express oneself.

In this sub-type (R+ D+ J++), participation becomes a concrete lever for expanding both individual and collective capabilities. It enables deliberative processes in which decisions can be questioned, discussed, and collectively transformed, thereby "modifying the terms of the debate" (Appadurai, 2004) and paving the way towards transforming society and social institutions. The J++ capability-enhancing institution can thus be said to be transformative in the sense that it generates a dynamic of feedback on public policies and opens the path to progressive change in institutional frameworks (Bonvin & Laruffa, 2024). Rather than reproducing the existing order, it offers the potential for reconfiguring institutional designs and workings and thus contributing to the elaboration of a different model of society.

We argue that for an institution to be truly capability-enhancing in this second sense, it must meet three fundamental conditions: (a) fully recognize the vulnerability of individuals and provide them with the needed resources to address it (R+); (b) support individuals' agency in all areas they have reason to value (D+); (c) recognize them as judges both within institutions and beyond (J++). The Capability-Enhancing Institution may help strengthening trust in institutions by demonstrating through institutional practice that democracy is a tool for individual freedom, not just a rhetorical device that legitimizes inequalities while reproducing them. It calls for a renewed conception of trust, not only in institutions, the economy or society as they are (a kind of adaptive trust), but in people's capability to transform institutions towards what they have reason to value.

4.3.3. Potential drifts

As already mentioned, participation can be fragile and lead to formal consultation that does not take individuals' views seriously. Structural inequalities can lead to such a drift if the rules of participation and debate are not properly considered. In cases of 'Voice Within', activation or professional integration schemes can illustrate this situation when individuals are invited to express their views on their job search preferences in a context where choice is tightly constrained: the options are limited, the trajectories are pre-defined and the contractualization, promoted as a reciprocal relationship between institutions and their beneficiaries, masks power asymmetry. In such

situations, even if formally recognised as judges, individuals have no room for manoeuvre. The formally consulted judge is disconnected from any real agency. Consequently, the choice is more formal than substantial, reducing the transformative dimension of the institution.

Ultimately, this kind of situation may encourage individuals to adapt their preferences to institutional constraints when they no longer have the necessary resources to assert or negotiate their rights, either individually or collectively. This can have structural consequences: namely undermining trust in institutions, creating the impression that 'the game is rigged', and fuelling social cynicism leading to withdrawal. It may also weaken individuals' status as beneficiaries, when being unable to assert their social rights, they are slowly excluded from protections and social support. It may then deteriorate into a configuration R-D-J-, where recognition, participation and agency are all ineffective.

To sum up, the Capability-Enhancing Institution aims to strengthen individuals' real freedoms – including their capability for voice and for aspiring – in connection with their environment. It does not simply provide access to resources but fosters conditions that enable people to act on what they truly value and to meaningfully participate in shaping social policy. Recognizing both human vulnerability and agency, it moves beyond tokenistic participation toward genuine influence and co-construction. However, the Capability-Enhancing Institution, at least in its 'Voice Beyond' version, remains an ideal that cannot be realized in a society that is not open to vulnerable people's participation or if more powerful institutions hinder the process. Therefore, it is necessary to consider this institution within its broader environment.

4.4. Conclusion

Starting from the emphasis an institution places either on the receiver, the doer or the judge and from the degree or intensity of this emphasis, we have identified three ideal-types and 6 sub-types (see table below). We point to the specific interdependencies between the roles of receiver, doer and judge in each type and to the kind of interplay requested between them in order to foster human well-being. The ideal configuration in this respect is the Capability-Enhancing Institution. While some institutions, typically the Basic Needs Institution, enable the individual to be only a receiver, the Capability-Enhancing Institution ensures a balanced interplay between the receiver, the doer and the judge. While connecting individuals to society, it can contribute to fuel a transformative process.

Our typology highlights the limitations of each type, when considered from the perspective of beneficiaries' experience, as well as the dynamics that these formal types can generate. The potential drifts associated with the different types generate recurring social criticism that must be taken seriously when reflecting on the future of social institutions, in order to avoid reforms that engage rhetorically with empowerment and participation but fail to consider people's voices, agency and aspirations. For transformative institutions to happen, it is essential to move beyond symbolic or token forms of empowerment and participation.

In the following section, we present empirical examples of lived experiences of specific social policies and how they relate to the types we identified.

BASIC NEEDS INSTITUTION (R+)		ADAPTIVE INSTITUTION (D+)		CAPABILITY-ENHANCING INSTITUTION (J+)	
Universal	Categorial	Paternalist	Responsibilizing	Voice Within	Voice Beyond
R++ D∅ J∅	R+ D∅ J∅	R+ D+ J-	R∅ D+ J-	R+ D+ J+	R+ D+ J++

(

5. Empirical illustrations

This section draws on the fieldwork conducted within the Involve project. The aim is not to come up with national types or to classify the 8 countries participating to the project within the typology, but to associate concrete institutions and their workings with each type, and thereby to illustrate how to operationalise the typology.

The findings draw on the case studies conducted by the NGOs and the research teams, in four social policy domains: education, employment, housing and health. They are based, for each case study, on a documentary policy analysis and the synthetical fiches of 15 interviews conducted with beneficiaries. The assignation of the different cases to a specific type is tentative. In the spirit of co-construction that guides the INVOLVE project, the results will be discussed during the next consortium meeting, with the aim to refine them. This discussion will, among others, offer the opportunity to deepen the analysis of the tensions that often arise between the normative principles that guide institutional programs, and their actual effect in beneficiaries' lived experience. Given their engagement with vulnerable people on the ground, NGOs are central to this analysis.

Some of the institutions under study, such as Irish Social welfare services, result directly from state initiatives, while others, such as the French Social Center, a third sector organization with mixed funding sources, are shaped more indirectly by state policies. The position of these various institutions within the typology is not always clear-cut, reflecting the lag that may exist between ideal-types and real-life institutions, since the latter are embedded in a broader institutional landscape that extends beyond their control but influences their design and outcomes. For each case, we will show the discrepancy that can exist between the ideal-type, the institution under consideration and the way it actually works, as revealed by people's experience of it.

5.1. The Basic-Needs Institution

5.1.1. Categorical sub-type: Social welfare in canton Geneva, Switzerland

Social welfare cash benefits are in most countries the typical case of means-tested, and therefore categorical, benefits.

Receiver: In canton Geneva, Switzerland, experiencing a need for financial support is not enough to receive it from the institution responsible for granting social welfare: the Hospice général. One must also fulfil a certain number of criteria in order to be deemed eligible. First, one must demonstrate that they have exhausted all other means to provide for themselves, whether through employment, rights to insurance-based benefits or even savings. This role of last safety net makes claiming social welfare cash benefits a symbol of personal failure in the eyes of many people – fuelling welfare stigma (Rogers-Dillon, 1995; Baumberg-Geiger, 2016) and deterring take-up of social benefits accordingly. The mechanisms of control set up at Hospice General to guarantee that only those deemed by the State as deserving of receiving support access benefits, refrain many who are formally eligible to ask for such support. One respondent, for example, explained how he

signed off Hospice Général even though still non-autonomous financially because he feared having to reimburse the amount of benefits perceived in the case of an inheritance. Others experienced temporary non-take-up by fear of the repercussion of benefiting from social welfare on their ability to have their residence permit renewed. Indeed, Swiss law states that benefiting from social welfare as a migrant with temporary residence permit may adversely affect a claim to citizenship or permit renewal.

This selectivity not only negatively affects the Hospice General's ability to respond to the Receiver material needs, it also influences its capacity to fulfil needs for psychological/emotional – what we coined well-being in section 2.2 – or practical support. One interviewee explains how he felt diminished in the interactions with the social worker in charge of his case when he felt the pressure put on him to find a job as quickly as possible. He told us how he felt anxious before and after each appointment and could not find a space for dialogue with the social worker. This lack of space for dialogue is telling of an institution mainly concerned with its cash distribution mandate, and particularly vigilant when it comes to distributing benefits only to those perceived as deserving. This negatively impacts the capacity to respond to other kinds of needs. This also naturally impacts its propensity to consider the doer and judge dimension.

Doer and Judge: One beneficiary from Hospice General told us how he felt that the institution's requirements were holding back his empowerment. He wishes to become an entrepreneur but does not feel supported as social workers keep pushing him to find a survival job before anything else. Another interviewee explains how she feels that Hospice general automatically considers its beneficiaries as "hopeless" and therefore do not take their aspirations seriously. This lack of consideration for the doer and, especially, for the judge dimensions while focusing on the receiver dimension for predefined categories of the population makes Hospice General a good example of a Categorical Basic-Needs Institution. As we will see in section 4.2.2, like many contemporary social welfare institutions, it also incorporates features of the Responsibilizing Adaptive Institution type.

5.1.2. Universal sub-type: Healthcare in Portugal

As in most European countries, the provision of primary healthcare services is based in Portugal on a universal principle. These services are funded by taxes, and primary care is free of charge. However, the experience of migrants and people belonging to the Roma community, who have been approached for the Involve project, highlights important inequalities in access to healthcare.

Receiver: The receiver++, which according to our typology characterizes universal healthcare, is mitigated for Roma populations in Portugal by several mechanisms. Firstly, people report significant difficulties in accessing care due to cumbersome procedures, excessive bureaucracy and long waiting times, as well as a lack of coordination between services. This case clearly shows how the workings of the institution can induce a shift from the normative principle called to guide its action (R++) to its actual outcomes (R-). The interviewees explain how much people rely on other organizations, namely NGOs, to access healthcare. These organizations may provide care themselves or help people navigate the system by liaising between different services and institutions, thereby restoring their ability to do so by themselves.

Doer: Even though the doer is not targeted by the healthcare system in principle, difficulties accessing healthcare can generate negative feelings due to a lack of autonomy when faced with bureaucratic obstacles. Negative relational experiences with social workers can also generate feelings of stigmatisation and a sense that one's agency is somehow reduced by the institutional

experience. Once again, we see a shift from the normative principle (Dø), which is supposed to guide the institution, towards actual outcomes where agency is rather diminished (D-).

Judge: People complain that they are not listened to (Jø or even J-), which reinforces their feeling of stigmatisation.

5.2. The Adaptive Institution

5.2.1. Paternalist sub-type: Two work reintegration programs in Italy

The two work reintegration programs hosted by the social cooperatives Il Trattore and Il Pungiglione studied in the Italian context follow the same principles: they aim at developing their beneficiaries' employability in partnership with the mental health institution they are conjointly in contact with. To do so, they offer work experience with subsidized employment in fields such as gardening or driving.

Receiver: Most participants interviewed feel supported psychologically and practically – they often insist how they feel better since in contact with the cooperative and how the team is benevolent and concerned with their well-being. Some even mention feeling like they are part of a family in the cooperative. This shows how the cooperatives put the receiver dimension center stage. On a more negative note, some participants nevertheless indicate that they are not earning enough with the work they do for the cooperative. Also, some stress how they aspire to financial stability, and that their temporary contract does not quite guarantee it – showing some limits to consideration of the receiver dimension by the two social cooperatives.

Doer: On the one hand, participants feel supported when it comes to engaging in a certain set of activities they value, but, on the other hand, they also feel either pushed towards other activities they would prefer not doing, or discouraged to pursue activities that are valuable in their eyes but deemed illegitimate by the institution. For example, many are thankful for the job the cooperative provides and how they flourish in being active and doing something useful. This satisfaction related to the doer dimension sometimes even goes further than the realm of their main activity within the program: an interviewee explains how social workers encouraged her to register in creative writing courses – her passion. Yet, the same person also mentioned how she felt forced to participate in collective counselling sessions; and also how she was somehow pushed towards moving into a retirement home. Other experiences suggest a supply-side orientated support by the cooperatives, where the main objective is preparing participants for available roles rather than facilitating opportunities aligned with their interests. Some interviewees for example explained that they did not have a say as regards the training they got enrolled into. Characteristic of an institution pertaining to the Paternalist Adaptive type, the two social cooperatives consider and propel the doer dimension only within a predefined scope of options.

Judge: The job participants engage in within the cooperatives rarely matches their original aspirations, and they do not have leverage over this. Their representation in the decision-making organs is very limited. Trainings are predetermined according to the needs of the market, and most activities are subject to mental health professionals' approval. Again, it is not that choice is non-existent within the realm of the cooperatives' activities, but it is bounded by the conception of a legitimate activity that heads of the cooperative and mental health institutions hold.

5.2.2. Responsibilizing sub-type: The Irish Social Welfare Services

Irish Social Welfare Services are managed by the Department of Social Protection. Inspired by neoliberal politics, they place a strong emphasis on activation and individual responsibility. In the Involve project, we examined more specifically their workings through the lens of single mothers' experiences in terms of access to childcare services. Historically, Ireland has been known for confining women to unpaid roles within the domestic sphere. The National Childcare Scheme was launched in 2019, and its implementation has been particularly scrutinised due to its potential to increase the employment rate of mothers. Among them, single women suffer the most from the lack of childcare, facing a range of intersecting inequalities.

Their activation dimension ranks Social Welfare Services among Adaptive Institutions, while the experience of beneficiaries suggests categorizing them as a Responsibilizing Institution (Rø D+ J-). While they do indeed place significant responsibility on single mothers, they also provide them with material support, thus adopting some features of the paternalistic version (R+ D+ Jø) of the adaptive institution.

Receiver: The support provided is primarily material, in the form of various types of benefits. Some of these are means-tested, while others are guaranteed minimums. However, bureaucratic procedures often hinder access. From the perspective of single mothers, there is not enough support in terms of childcare, with access being limited to women in low-income employment. To get access to more than 17 hours childcare a week (which is the maximum amount for people who earn less than 26000€ a year), single mothers must be employed or enrolled in training, but at the same time childcare is subject to income ceilings. Material support is further overshadowed by a lack of relational support: beneficiaries perceive their interactions with social workers as impersonal, asymmetrical and judgemental, creating an additional burden. They report being treated with suspicion and subjected to intrusive questions about their personal lives in order to prove their need and deservingness. They feel controlled and restricted in their family life much more than fathers without custody of their children do, which leads them to experience gender inequality.

Doer: From a general point of view, Social Welfare Services aim to develop the Doer (D+). Support is driven by an activation logic focused on labour market integration, through training and employment programmes. However, it is also firmly rooted in individual responsibility (individual-centered agency). Yet, the actual range of possibilities available to these single mothers is limited. Many feel trapped in low-skilled jobs or training schemes, without the opportunity to pursue higher education or more fulfilling careers. They complain about the lack of alternatives and the absence of choice. At the same time, the income ceiling that determines the financial benefits they receive creates a contradiction: they are encouraged to work, but when their income rises, they lose access to vital support such as childcare. This trap of conditional benefits is experienced as highly restrictive. As a result, these women often report a loss of agency and describe themselves as doer- (D-).

Judge: The judge dimension is extremely limited in the Irish Social Welfare Services. At an individual level, Social Welfare Services urge people to adapt to the labour market without giving them the opportunity to express their needs or aspirations. At a more collective level, the introduction of the National Childcare Scheme (NCS), which restructured child welfare services, included a consultation phase. However, it was criticised for creating obstacles to participation for the most vulnerable lone parents. NGOs and peer-led advocacy groups have highlighted that these

parents are treated as passive beneficiaries rather than active participants in the development of public policy.

5.3. The Capability-Enhancing Institution

5.3.1. Voice within a French Social Center

The Social Center is a local, non-profit organization in the third sector. Its aim is to foster the social, cultural and economic vitality of the neighbourhood by responding to environmental considerations and residents' aspirations. The French state and local municipalities delegate some of their responsibilities to the Social Center through calls for projects in areas such as migrant integration, neighbourhood social life and childcare. Our research focused more specifically on a vocational training program for migrant women. The Social Center plays a central role in implementing local social policies. According to the normative principles that guide its actions, it can be described as a capability-enhancing institution. However, its weak position within the welfare state limits its effectiveness.

Receiver: The Center offers a range of local resources, primarily of relational and symbolic nature (such as community events and cultural outings), as well as practical services (such as legal support and social information). However, the receiver dimension is only partially fulfilled and essentially in an informal way, disconnected from the financial benefits distributed by the social welfare state. Indeed, the Center's organization is rooted in the local community and builds mainly on informal mutual support. The emphasis is placed on building social ties and supporting the most isolated individuals. However, both human and material resources remain limited. Four salaried staff members coordinate its activities with the help of neighbourhood volunteers. Access to the Social Center is open to everybody, without any restrictions, provided a small fee of approximately 30€ a year. For the training session preparing the BAFA certificate giving access to childcare jobs, the fee is 120€, which is not much in comparison to the fees charged by private training institutes, but it is nevertheless a lot for unemployed people.

Doer: The Center fosters individuals' capabilities through both "individual-centered" means (such as language courses, and access to legal and social rights) and "environment-centered" means (by contributing to the development of a local environment that is conducive to action, especially with regard to the relational and practical aspects of everyday life, and by shaping the local associative landscape through partnerships). These activities support migrant women's autonomy in everyday life, facilitate their access to rights, and encourage their civic engagement through volunteering. Thanks to its accessibility and stable presence, the Center helps people to overcome social isolation, become more familiar with their surroundings, and reclaim public spaces. Additionally, the training opportunities offered by the Center aim to support professional integration by recognising and enhancing individuals' own valued skills for the labour market. However, it achieves limited results in terms of access to employment, due to its lack of connection with enterprises and employment agencies.

Judge: The participation of vulnerable people is at the heart of the Center's mission. Access to rights is considered a key condition for enabling people to see themselves as full citizens. The Center moreover promotes participatory governance, allowing residents to take part in decision-

making processes. Projects are often co-constructed through direct engagement with local inhabitants, based on needs identified through fieldwork by the coordinators.

This overview of the RDJ dimensions in the Social Centre reveals several tensions due to the institution's limited resources. Some initiatives – particularly those targeting employment – are implemented under public service mandates, which constrain the Center's autonomy and require it to align its actions with political imperatives. There is a risk of adapting vulnerable people to societal norms rather than empowering them. In addition, the Center depends on fragile, short-term funding, which limits its ability to fully address the receiver (R) dimension. As a result, it often redirects people to other institutions for material support. The Centre regularly finds itself in a position where it has to fill social security gaps that it cannot afford to fill, relying on neighbourhood networks and other institutions.

Finally, although the Center actively promotes participation at local and neighbourhood levels, it cannot give vulnerable people a voice beyond the local context. While its legal counselling and advocacy work can help individuals claim their rights, the collective voice remains confined to the micro-local scale. Focusing on migrants who are partly undocumented highlights both the strengths and limitations of local participation. The Center can support local voices, and potentially voices beyond the local level, through rights-claiming activities at an individual level. However, the outcome of these claims depends on the relevant institution. Although the Social Center appears to be an essential institution, its room for manoeuvre depends on more powerful institutions.

5.3.2. A Temporary shelter for mothers and children in Portugal

We classify this emergency-based service as a Capability-Enhancing Institution. Operating primarily on donations and multiple funding sources, this associative structure provides protection and comprehensive support to young and single mothers facing severe precarity. It helps them access their rights and develop autonomy, and supports their parenting. The shelter delivers a holistic form of care that aims to foster reintegration into society.

Receiver: The fact that the shelter targets a specific population, i.e. mothers, allows for an integrated and extensive approach. The support provided is broad in scope: most women receive a small amount of financial assistance – not always sufficient, but still highly valued –; they benefit from strong relational and psychological support, including attentive listening from several professionals with whom they build trust. Healthcare assistance is available, although its effectiveness varies; support is more often directed at the mothers than their children.

Doer: The shelter fosters agency in several ways. Through tailored support, women are helped to regain autonomy and self-confidence. This includes referrals to training programs at other institutions, guidance toward job insertion and employment-focused workshops. The shelter is well-connected to a network of institutions (environment-centered agency), creating an integrated care environment. It acts as a foundational anchor, complementing what may be lacking in public service offers. It provides altogether support and a safe and secure environment that help residents to develop their autonomy and claim their rights at other institutions. The shelter also fosters a form of collective capability through mutual exchange and support that helps residents to build stability and autonomy.

Judge: The shelter gives mothers time and space to reflect on their future and aspire to a better life. Within the shelter, women feel empowered to speak, to share their thoughts and emotions with professionals. Open dialogue is encouraged, and regular exchanges foster a sense of entitlement and respect. Such capability for voice within the shelter stands in contrast with other institutional

experiences where these women felt silenced or disrespected. However, while they feel recognized and respected within the shelter, they continue to suffer from a lack of recognition within the broader institutional landscape.

The positive experience of the residents with respect to the receiver, the doer and the judge, and their feeling to be respected and heard lead us to position the shelter as a capability-enhancing institution, despite the fact that from a strict institutional point of view, it is characterized by emergency intervention and assistance. The shelter case thereby illustrates how the capability approach helps to reverse the analysis of social institutions.

5.4. Conclusion

In this section, the Involve case studies, which have been used to build our typology, are associated with the types and sub-types proposed in the previous section. As we have seen, confronting ideal-types with real cases reveals variations, which are for one part, due to the institution's position within the broader social policy landscape, and for another part, due to the risks of drifts inherent to each type. These risks are real, but they only become apparent when we shift the focus from the discourse institutions have about themselves to people's lived experience.

From a traditional welfare perspective, which focuses on social protection systems rather than single institutions, the institutions that we have identified as capability-enhancing (the Social Center in France and the Temporary Shelter in Portugal) would be categorized as institutions providing assistance. This is partly because their beneficiaries do not financially contribute to the social protection system and partly because of the type of funding the institutions receive (they are funded by municipal social assistance or donations). However, from an individual experience perspective, the Social Center enables beneficiaries to engage with their neighbours and play an active role in the local community. Beneficiaries contribute voluntarily on the basis of social ties. However, this contribution is limited to a small, micro-local area. Beyond this area, individuals are not expected to act as judges or doers. This creates a disconnection from the outside world, resulting in a sense of belonging within, and stigmatisation outside. As we have seen, this discrepancy carries the risk of shifting from receiver+ (R+) to receiver- (R-). The Social Center therefore maintains a precarious balance between the doer and the judge, while helping beneficiaries' access and maintain their rights as receivers.

We also categorize the Temporary Shelter as capability-enhancing given the consideration it shows towards individuals as receivers, doers and judges. From a welfare perspective, the Temporary Shelter provides assistance and is funded by donations. From this point of view, mothers are welfare recipients whose role as judges is denied. However, their experience within the shelter clearly shows that they flourish as doers and judges. Here too, the shelter maintains their role as receivers, doers and judges, in a precarious relationship with the outside world where they feel discriminated against.

In contrast, the Portuguese public hospital, which we categorize as a Basic Need Institution, has several shortcomings in the eyes of its users, who do not feel fully recognised as receivers (they find access difficult and are subject to discrimination). This may be surprising to the readers familiar with the findings of Korpi and Palme (1998), who show that universalist policies are more effective at reducing poverty than targeted policies. We hypothesise that this discrepancy stems from the



focus on people experiencing the limitations of a welfare relationship that treats them as beneficiaries but deprives them of a voice.

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6. Conclusion

By focusing on people's experiences of institutions, this typology sheds light on the conditions that determine users' capacity to actualise their receiver, doer and judge dimension within and beyond institutions. On a micro-local scale, these conditions may be based on trust and interpersonal recognition, but what might these conditions be at the scale of social protection systems in general?

While institutional recognition of individuals as receivers is based on the concept of vulnerability, the experiences shared with us by vulnerable people show that this concept often denies them the roles of doer and judge. Vulnerability, along with the social categorizations that define it, therefore runs the risk of confining people to the role of receiver, thus working against them, especially when they cannot participate in defining these categories. This is but one among the many illustrations of the existing gap between official and institutional views on the one hand, lived experiences of beneficiaries on the other hand. It shows the need for moving beyond existing typologies and their limitations and designing renewed multi-level typologies of social institutions and services, taking full account of this gap and integrating both components in the typological effort (and including also the viewpoint of street-level bureaucrats and how they interpret their margin of manoeuvre in the implementation process of social policies – Bonvin et al. 2023). This intermediary report is a first step in this direction, which will be pursued in the next months.

To be completed after the collective discussion on October 7

(7. References

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