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Dualization and Welfare in the 21st Century: A Literature Review and a Proposal for a Conceptual and Explanatory Framework

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Dualization and Welfare in the 21st Century: A Literature Review and a Proposal for a Conceptual and Explanatory Framework¹

Jorge Hernández-Moreno²

Gibrán Cruz-Martínez³

Abstract

This working paper analyses the nexus of the labour market and social protection system dualization in the 21st century, highlighting its institutional roots and societal implications. Our analysis, grounded in an extensive literature review, underscores the institutional structures and regulatory mechanisms that have historically stratified social protections and rights according to the form of employment, perpetuating inequality between insiders and outsiders of the social protection system. We aim to scrutinise the multifaceted dimensions of dualization processes. By adopting the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) guidelines, our methodological approach ensures a thorough examination of dualization's extent within welfare states. Our findings reveal the complex dynamics favouring insiders (winners) at the expense of outsiders (losers), enlightening the differentiated access to welfare benefits and services. The working paper's significance lies in its contribution to understanding the institutional foundations of labour market dualization and its broader implications for social equity. Our analysis maps the evidence of dualization across various contexts and underscores the pivotal role of policy interventions in addressing the deep-rooted divides between insiders and outsiders. Consequently, this working paper offers valuable insights for policymakers, scholars, and practitioners aiming to foster more inclusive and equitable labour markets and social protection systems.

Keywords

Social policy, institutional stratification, welfare systems, employment policy, social rights, regulatory frameworks

¹ This working paper serves as the basis for a chapter currently under preparation, aiming to be published in 2025.

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A visible and broader gap has emerged between those who have access to standard work and those who can only access non-standard work, which is much more precarious. The gap between stable and precarious does not necessarily reflect educational differentials [...]. The dualism has rather institutional roots. It is the result of regulatory structures stratified over time, including those that concern social protections and rights. In some respects, the precariousness of labour relations can be seen as the counterpart of those traditional entitlements that protected employed workers with standard contracts in traditional, predominantly Fordist and heavily unionised sectors.

(Ferrera et al., 2024a: 12)

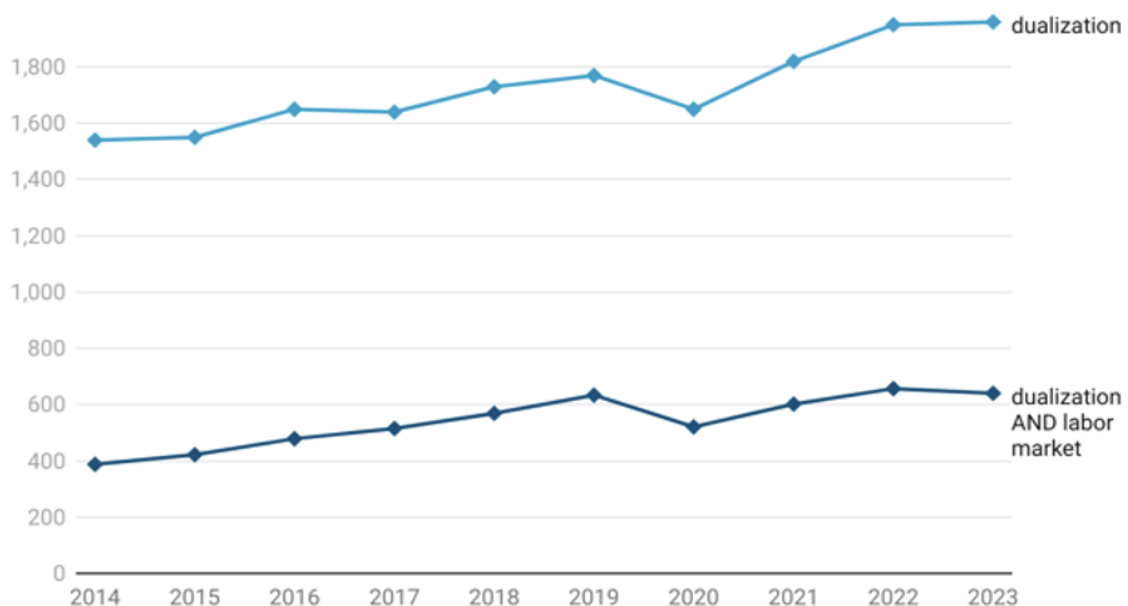
Introduction

The functioning of capitalist labour markets and the evolution of employment policies (especially unemployment protection policies) produce several risks that directly and indirectly affect the intrinsic nature of social protection systems (ILO, 2023a). There is ample evidence linking the explosion of irregular employment and precarious work in the context of the post-industrial transition to workers' health and well-being (Esping-Andersen, 1999; Rueda, 2014; Barbieri & Cutuli, 2016; Rehm, 2020; Clegg et al., 2023; Ramos y Del Pino, 2024). However, until the mid-1990s, the outcome of the interaction between labour markets and welfare –both as a sphere of government action and as an object of research– was of virtually no interest to most scholars of comparative social policy (Clegg & Durazzi, 2023: 6). Since then, its social, political, and academic importance has only grown, especially since the "decade-long crisis" (Ferrera et al., 2024b) that began with the Great Recession of 2008 and has continued with the recent COVID-19 pandemic. These (almost) successive *transboundary crises* (Boin & Hart, 2003; Boin & Lodge, 2016; Boin, 2024) have marked the evolution of programmes, policies and the capacity of public managers and decision-makers who integrate and manage labour markets and social policies in the first decades of the 21st century (Jestl & Stehrer, 2021; Béland et al., 2021; Pavolini et al., 2023).

It is, therefore, not surprising that in recent years, there have been remarkable quantitative and qualitative (theoretical and analytical) advances in the comparative study of labour marking and welfare policies. In this regard, comparative social policy literature and political economy approaches have developed valuable and sophisticated analyses of the changing nature of social problems and realities. At the same time, these two bodies or fields of theory have provided a set of concepts, including the notion of

dualization, which allows us to understand the different institutional and organisational trajectories of labour markets, as well as their implications for welfare states and social rights (Rueda, 2005; Emmenegger et al., 2012; Schwander, 2019, 2023; Ferrera et al., 2024a: 12-14). A search in Google Scholar shows more than 37,100 results with the term *dualization*⁴ and 7,700 with *dualization and labour market*⁵ (aggregate results as of April 2024). Figure 1 shows the number of hits for these searches each year during the last decade.

Figure 1. Google Scholar results for the terms "dualization" and "labour market"



Source: authors' own compilation

This working paper offers a general review of the literature on the processes of dualization of labour markets and social protection systems. At the same time, it also proposes a conceptual and analytical framework to observe, capture and explain the extent of these processes in 21st-century welfare states. From a methodological point of view, this paper adopts the guidelines defined by the *Preferred Reporting Items for*

⁴ The specific search was "dualization" OR "dualization" to include publications with American and British English.

⁵ The specific search was ("dualization" OR "dualization") AND ("labor market" OR "labour market") to include publications with American and British English.

Systematic Reviews and Meta-Analyses (PRISMA⁶) (Page et al. 2020, 2021). The review may be unable to resolve the ambiguities and complexities related to the notion of dualization. Still, it can be a first step in this direction, providing a review of the definition, measurement and explanation of the dualization process. To this end, the following section is devoted to a brief historical approach to the concept of dualization. This section also reviews and synthesises the different theories and typologies developed to analyse and measure the dualization process, establishing a dialogue between comparative social policy and (mainly) political economy. In the third section, an explanatory model of the differential impact and scope of dualization is presented, based on an institutionalist approach related to macro-politics. The fourth section provides an overview and summary of how dualization creates insiders (winners) and outsiders (losers) in relation to social rights and access to certain primary benefits and services. Finally, some conclusions and possible policy implications around this field of action are presented.

Conceptual approach, main analytical theories and typologies

Background

Although the origins of labour market policies go back - in most cases - to earlier times, the origins of our object of study can be traced to the period immediately after the Second World War. During the "Golden Age" of the Welfare State or the *Trente glorieuses* - between 1945 and the early 1970s - social protection was based on the generalisation of employment, the increase in wages and the search for social and demographic homogeneity through the design and implementation of national welfare programmes (Esping-Andersen, 1990, 1996; Pierson, 1994). Electoral competition for public office led to a political commitment to full employment (Scharpf, 2000). Within the framework of this *Keynesian national welfare state* (Jessop, 2002, 2008), it was widely accepted that the state should intervene in broader areas of society to control and reduce social and geographical inequalities (Obinger et al., 2005; Loughlin, 2009). Thus, social protection went from being a private matter to becoming a right. As

⁶ The PRISMA mixed methodology is increasingly used by academics from a wide range of disciplines, ranging from the health sciences to the social sciences (Harguindéguy et al. 2022; Kleider y Toubeau 2022).

Loughlin (2007) points out, "T. H. Marshall (1950) argued that welfare states complemented political citizenship, which had won the rights associated with liberal democracy, with social citizenship, which implied a set of rights to social welfare" (Loughlin, 2007: 387). Most employment protection legislation was enacted during this period (Rueda, 2014: 386). In the case of countries in the Global South, income support programmes for the unemployed also began to be adopted after the Second World War (Obinger & Schmitt, 2022). In general, labour market participation was necessary to access comprehensive social protection, regardless of the type of welfare system or "regime" (Emmenegger et al., 2012; Cruz-Martínez, 2019b).

However, from the mid-1970s onwards, labour markets and welfare states worldwide began to undergo significant functional and spatial changes. Successive oil shocks, rising inflation, technological change, the saturation of product markets and the international mobility of capital and labour created a global economy beyond the nation-state. In this era of *post-industrial welfare capitalism*, there was a shift from a predominantly industrial society to a tertiarisation of the employment structure, an expansion of higher education - which promoted a wide range of professional and managerial occupations - and a feminisation of the labour force (Esping-Andersen, 2009; King & Rueda, 2008). In this new era, the state abandons its political commitment to guarantee full employment and establishes new connections between passive welfare measures, active labour market policies and economic development. For scholars of comparative social policy, the result of all these structural changes was the establishment in many countries of a "dual welfare system", characterised, among other things, by increasingly segmented labour markets and unequal access to social protection programmes (Tussing, 1975; Leibfried & Tennstedt, 1985; Barrientos, 2019).

Defining the complex notion of dualization

The definition, conceptualisation and analytical operationalisation of the term dualization is subject to much debate and varies considerably in the existing literature. Often, dualization scholars interchangeably use the notion of dualization as a synonym for relatively analogous terms, such as labour market inequality or risks. The term dualization is also often used to define different, more general labour-related processes,

such as the rise of non-standard employment, the increasing stratification of the labour market or the partial deregulation of policies linked to social protection systems (Busemeyer y Kemmerling, 2020: 375).

In the debate focusing on new ways of thinking about contemporary changes in the political economies of wealthy democracies, the so-called *varieties of capitalism* literature, dualization is a type of liberalisation trajectory that does not involve a direct attack on institutions of collective regulation but occurs through a process of policy "drift" or institutional erosion (Hacker & Pierson, 2010). In this sense, the framework proposed by Hall & Soskice (2001) is currently the most widely used. The strength of this proposal is that it offers a more holistic view of a large and rich body of work that explores historical differences in the institutional infrastructure of different capitalist countries. As Thelen (2012) points out, while earlier work often focused on industrial relations or finance, Hall and Soskice offer an integrated and systemic view that emphasises the linkages between all the major institutions that define capitalist political economies: industrial relations institutions, financial arrangements, education and vocational training systems, corporate governance, and social policy regimes (Thelen, 2012: 138).

In sum, from a broad point of view and building on previous work, we can define dualization *as the unequal distribution within the working population of labour market risks, such as the deregulation of labour legislation, collective agreements and social rights* (such as the rights to food, adequate housing, education, health, social security, training, participation in cultural life, water and sanitation). These risks have a distinct socio-structural and socio-demographic basis. In this sense, there is ample empirical evidence that these risks tend to be mainly concentrated among certain social groups, such as women, immigrants, young people, and low-skilled workers - people with little formal education - and that they tend to be concentrated among the poorest and most vulnerable groups (Roos et al., 2024). For instance, despite numerous policies aimed at enhancing pay transparency, raising awareness, implementing anti-discrimination laws, or improving contract terms and managerial duties to tackle gender segregation, women continue to face challenges in the job market (for an in-depth analysis of this issue, see

the work of Zwysen, 2024). Furthermore, from a geographical point of view, we also have evidence that these risks are more concentrated in some regions, such as continental Europe and - mostly - southern Europe (Esping-Andersen y Regini, 2000; Schwander y Häusermann, 2013; Häusermann et al., 2016; Pardos-Prado, 2020; Confurius et al., 2023).

Insiders/outside theory

The origins of the insider/outsider theory can be found in the work of Doeringer & Piore (1971), Reich et al. (1973), Gordon et al. (1982) and Lindbeck & Snower (2001). These authors analysed the divide between employed and unemployed in the United States during the oil crisis of the 1980s, as well as the persistence over time of high levels of unemployment in European labour markets. These contributions show that employment stability and income insecurity are key indicators for analysing labour market segmentation.

Among dualization scholars, there is a broad consensus on the relevance of David Rueda's theoretical, conceptual and analytical work (Häusermann et al., 2020: 346). Rueda redefined the term dualization and reinterpreted the more classical notions of insiders and outsiders. In this sense, Rueda defines insiders as workers with jobs that are highly protected by legislation, with high firing costs, high levels of investment achieved by the firm, presence and strength of trade unions, or high qualification of workers in the production process (Rueda, 2014: 384). The notion of "outsiders" (subject to much controversy and debate) refers to workers who "are unemployed or occupy jobs that are characterised by low levels of labour protection and rights, lower wages and precarious levels of benefits and social security regulations" (Rueda, 2005: 62; Rueda, 2006: 387).

Subsequently, and continuing with this line of work, Rueda (2014) also developed an empirical measurement tool to explore the dualization phenomenon systematically and longitudinally by considering two variables (or dimensions): 1) the level of employment protection enjoyed by insiders and 2) the absence of labour market policies favourable to outsiders. In short, although the operationalisation of insiders-outside starts from

a static conception and a simple dichotomy of regular versus atypical or unemployed individuals, it has come to constitute a central taxonomy for the study of the dualization of labour markets and welfare states (see, for example, the works of King & Rueda, 2008; De la Porte & Emmenegger, 2017; Eichhorst & Hemerijck, 2010; Eichhorst et al., 2017; Eichhorst & Marx, 2011; Biegert, 2019; Kevins, 2019; Rovny & Rovny, 2017; Marx & Picot, 2019, y Sochas & Reeves, 2023).

Among academics and scholars of dualization, the work done by Emmenegger (2009, 2014) stands out in explaining and understanding the rise of inequality in recent decades and the role played by social policies and labour (de)regulation. For Emmenegger (2009), dualization is essentially a process of stratification in which temporary contracts are progressively deregulated. Emmenegger classifies external workers into five groups (1) labour market insiders, who are full-time employees with a permanent contract who are not in a professional, managerial or senior management position; (2) labour market outsiders, who are (a) employees who work part-time (or less), (b) have a temporary contract, or (c) are currently unemployed; and (3) upwardly mobile, occupying a professional, administrative or senior management position; (4) self-employed; and (5) non-employed, a group consisting of students, retired people, people caring for family members, permanently disabled/sick or out of the labour force for other reasons (Emmenegger, 2009: 137). Similarly, Emmenegger et al. (2012) point out that dualization increasingly implies a differentiation in the rights, benefits and services provided to different categories of beneficiaries. According to these authors, dualization can take three distinct forms, both in policies regulating social protection and in policies directly related to the labour market: 1) a deepening of existing divisions, deepening the differences between insiders and outsiders; 2) a widening of divisions, shifting insiders to external positions; and 3) the form of new institutional dualisms.

Also seminal in the insider-outsider literature are the works of Häusermann and Schwander (2012), Schwander and Häusermann (2013) and, more recently, Schwander (2019, 2023). In general, for these authors, dualization refers to a trend in labour force and labour market policies, according to which, in most Western and rich democracies, a decreasing number of individuals have a job biography that corresponds to the

industrial model of protected, stable, full-time and fully insured employment. Häusermann and Schwander (2012) differentiate between three models of social dualism to analyse the structural trend of post-industrialisation. On the one hand, labour market dualism refers to the structural disadvantages of workers in relation to income, labour mobility and access to training. Social protection dualism focuses on the degree of social rights and benefits coverage. Finally, the dualism of political integration focuses on political representation and proximity to the decision-making process. More recently, Eichhorst & Marx (2021) have proposed a dynamic tool to operationalise and measure (de) dualization. To assess unemployment protection reforms and the persistence or otherwise of dualization over time (as well as back-and-forth reforms), they focus on changes in the regulation of dismissals of workers on fixed-term contracts and the regulation of the hiring of workers on fixed-term contracts or in the form of temporary work.

Determinants and drivers of dualization processes in labour markets and social protection systems: a proposed explanatory framework

In general, the notion of dualization has a clear analytical and explanatory orientation towards the processes that create situations of inequality, leaving aside the consequences and outcomes at the individual level (Nicolaisen et al., 2019: 4). Thus, the determinants of dualization and its impact on welfare are a central issue in public, political and academic debate, especially in advanced capitalist democracies (Busemeyer & Kemmerling, 2020; Simoni & Vlandas, 2021). Two main groups or interpretative frameworks are particularly relevant. On the one hand, some focus on the microeconomic level, namely on the strategies of firms or industry - that is, the "capitalists who own them" (Swenson, 2002; Doellgast et al., 2018). For this group of employer-centred work and research, trends towards dualization of labour markets and socio-structural cleavages are a response of capital to changes in technology and international product markets (Palier and Thelen, 2010: 120; Busemeyer and Thelen, 2020). Since the mid-2000s, however, a large and important body of work has shifted to an institutionalist approach related to macro-politics to explain dualization and its interrelationship with welfare states and social policies. Drawing on this body of work, this section identifies different factors or variables that form our explanatory framework

for studying the trajectory and extent of dualization processes in labour markets and welfare.

Industrial partners: the role of trade unions in the welfare states of the 21st century

First, there is a broad consensus on the traditionally decisive role of trade unions - as industrial relations (IR) institutions - in the evolution of labour markets and welfare states (Gordon & Nijhuis, 2023; Hyman and Gumbrell-McCormick, 2024).

After the Second World War, in Western Europe workers' representatives filled parliaments and often held the reins of governments, domesticating capitalism and creating the welfare state. Once it gained a high share of political power, the emancipatory thrust of the twentieth-century proletariat gradually withered away. [...]. With the post-industrial transition, the Fourth Estate has gradually shrunk in numbers and a new stratum of 'deprived' workers has instead risen.

(Ferrera et al., 2024a: 1-2)

The role of trade unions has evolved over time in the face of repeated challenges from neoliberal programmes implemented by many governments worldwide (especially in EU member states and at the European level) (Waddington et al., 2023; Danaj & Meszmann, 2024). Hence, there is a rich academic debate on how trade unions can (re)build solidarity and reduce social risks in the workplace. Power resource theory (Korpi, 1974; Korpi & Palme, 2003; Pulignano et al., 2015; and more recently, Refslund & Arnholtz, 2022) is the most widely accepted and explanatory framework on the role of trade unions in all these processes. This theoretical and analytical framework seeks to understand and explain the use that trade unions (as the natural representation of the interests of the entire working class) make of different power resources - institutional, structural, or associative - and their application to industrial relations and social policies.

An essential part of the most current contributions from the insider-outsider theory (primarily based on the Scandinavian experience and the Swedish case in particular) see trade unions as complicit in dualization processes. The argument goes as follows: unions, composed mainly of workers with secure contracts and high wages, focus on protecting and safeguarding the interests of their members, ignoring the interests and concerns of precarious, casual and insecure workers (Saint-Paul, 2002; Palier & Thelen, 2010; Hassel, 2014). For example, in the case of Southern Europe, the dualization of labour markets

would be the result of the political appeasement of trade unions and their strong positioning in favour of social protection for their members (see the work of Manow et al., 2018 or Schwander, 2023: 30).

Other work has pointed out that unions also engage and fight for the causes and needs of precarious, low-skilled, marginal and vulnerable workers through bargaining and recruitment strategies, even in the case of conservative welfare states (Marx & Starke, 2017; Doellgast et al., 2018; Mendonça, 2020; Carver & Doellgast, 2021; Canzio, 2023). Beyond Western Europe, Puricelli (2019) found that two trade unions in Argentina and Uruguay were key actors in the inclusion of outsiders in pension systems. The corporatist relationship with the government in Argentina and class identity in Uruguay were determinants of the unions' pro-outsider measures in the two Southern Cone countries. Natili and Puricelli (2023) also find pro-outsider policies in the two largest unions in Italy and Argentina, driven by organisational resources and growing competition from radical unions and social movements. Cigna and Fabris (2024), based on textual evidence and semi-structured interviews, show how the Italian labour movement and trade unions, although with differences between confederations, have radically changed their preferences: from a 'deservingness' logic (championing 'hard work') to one of reservation wage (the 'we are all in the same boat' narrative). For these authors, the Italian case amplifies the role of actors in welfare reform, showing that the labour movement can support ways of 'de-dualising' welfare.

A middle way, which tries to reconcile the two dominant theoretical approaches, is developed, among others, by Hauptmeier and Vidal (2014), Durazzi et al. (2018) or Benassi and Vlandas (2016, 2022). These contributions highlight the transnational diversity in trade unions' response to dualization, pointing to the importance of institutional structures and historical identities in explaining their different strategies in the face of new challenges.

Governmental partisanship: the role of governments in dualization and social policies

The traditional "partisan politics theory" asserts that left (or centre-left) parties and right-wing parties hold opposing and contrasting positions on welfare issues (Huber and Stephens, 2001; Häusermann et al., 2013). This theory assumes a direct and linear relationship between the type of party in power (e.g. social democratic or conservative) and political output (Häusermann, 2010; Häusermann et al., 2013: 221). In this sense, Rueda's early and original work (2005, 2006, 2007) found that social democratic governments defend the interests of wage earners to the hilt and promote policies oriented towards insiders to the detriment of outsiders (fervent demanders of activation policies). According to Rueda, these parties contributed to widening the gap between insiders and outsiders for electoral reasons despite corporatist agreements.

Research by Eichhorst & Marx (2009) and Dingeldey (2011 and 2016) also point to the partisanship of Gerhard Schröder's social democratic government in Germany in the first decade of the 2000s as the main explanatory factor for the deregulation of all flexible forms of employment and the (re)regulation of part-time jobs - in the form of so-called "mini-jobs". Recently, Simoni and Vlandas (2021) have shown that the degree of dualization over time depends, among other factors, on the partisan tilt of governments. Thus, labour reforms in most Western European countries with a clear tendency towards dualization were implemented by centre-left governments. In this regard, Fossati and Trein (2021) point out that in dualising countries such as Germany, France and Italy, social democratic parties still have incentives to cater to traditional electorates due to the strong dualization of the labour market, i.e. the gap between a primary labour market with stable, well-paid jobs and adequate social benefits and a secondary labour market with precarious jobs and limited social benefits. However, other research has questioned the negative role of social democratic governments, pointing out that in countries where these parties are stronger (such as in the Nordic countries), tendencies towards labour market and social policy dualization are less pronounced (Emmenegger, 2009; Thelen, 2012, 2014).

The role of coalitions of interests among actors and the mediating role of electoral considerations

A third factor explaining the scope and intensity of dualization processes is related to the configuration of certain coalitions of interests between actors and the mediating role of certain electoral issues. The insider-outsider theory argues that a durable coalition of actors determines and explains the extent and intensity of labour market segmentation processes and the underlying policies (see Rueda, 2005; Emmenegger et al., 2012; Hassel, 2014; Baccaro y Benassi, 2017). Palier & Thelen (2010) point out that the evolution of the intersection between industrial relations, labour markets and social protection systems towards new forms of institutionalised dualism (especially since the 1990s) can be explained by a series of interclass coalitions that seek to safeguard certain institutions and maintain economic efficiency. Thelen (2014) attributes the variation in dualization processes to coalitions of interests and the capacity of the state to negotiate the different demands of different types of workers.

More recently, Branco & Cardoso (2022) describe and explain the labour market reforms in Portugal between 2011 and 2014 based on the establishment of a broad informal political coalition between the centre-right parties in government, the main opposition party (Partido Socialista, PS), the General Workers' Union (Unión General de Trabajadores, UGT) and the employers' confederations (Confederación Empresarial, CIP). This reform included reducing the number of public holidays and holiday days and creating a bank of 150 hours per worker managed by the company (so as not to pay overtime). Pilati & Perra (2022) show how different coalitions of actors around insiders and outsiders participate in contentious labour politics. They show how trade union federations and professional associations support large-scale institutional actions of an economic nature. On the other hand, unorganised or self-organised workers actively engage in traditional and disruptive actions to mobilise outsiders around economic issues.

International organisations and supranational institutions: the specific role of the EU

The disturbing reality of a "multi-crisis Europe" is an essential backdrop for analysing EU social policy [...] with the political momentum created by the Juncker European Commission (2014-2019) and the seeds sown in 2020, the European Commission von der Leyen has been able to pursue an ambitious social policy agenda through 2021 and the first half of 2022, despite global turmoil and in many cases with Covid-19 acting as a catalyst.

(Vanhercke et al., 2022b: 137-138)

From our literature review, we can conclude that most of the work and research on the dualization of welfare and work focuses on the role of the actors and the dynamics and trajectories of these processes within the spatial container of the nation-state. However, more and more scholars are paying attention to the impact of the activity of supranational institutions such as the European Union (EU) on the evolution of these processes (see de la Porte y Heins, 2015; European Commission, 2021; European Parliament, 2022; Spasova et al., 2022; Vanhercke et al., 2022a; Maccarrone y otros, 2023; de la Porte y otros, 2023; Keune et al., 2023). However, there is a broad consensus that the contemporary revitalisation and strengthening of the EU and its institutions and bodies in the social and employment dimension has come about through the crises that have beset the supranational political system since the late 2000s (Lesch & Millar, 2022; Ferrara & Kriesi, 2022; Ferrera, 2024; Ferrera et al., 2024b). This is especially evident since the launch of the European Pillar of Social Rights (EPSR) in 2017. This new instrument has revitalised the role of decision-makers and political actors at the supranational level in shaping labour markets, employment policies and welfare in general (under the idea of European social citizenship) (Ferrera et al., 2023). The creation of the *High-Level Group on the future of social protection and of the welfare state in the EU*⁷ by the European Commission at the end of 2021 also goes in the same direction (European Union, 2023).

⁷ The main task of this group is to analyse the impacts of megatrends (such as socio-demographic changes) on the labour force and transformations in the labour market, as well as on the emergence of new risks on social protection and welfare states in general. The members of this High-Level Group develop key strategic recommendations at both national and EU level for the future of social protection. One example is the report "The future of social protection and of the welfare state in the EU", which in addition to

Concerning our object of study, de la Porte and Emmenegger (2017) analysed the case law of the Court of Justice of the European Union (CJEU) on fixed-term work. They found that, while EU labour law does not curb dualization processes, it does impact issues directly related to the labour market, such as the equal treatment of workers, regardless of their type of relationship or type of contract. Arnholtz (2023) points out that, in recent years, the Nordic countries have been under pressure from dualization induced by EU regulation (rather than national policy), which has institutionalised low-wage mobile workers as a marginalised group. The work of de la Porte et al. (2020, 2023) also reinforces this line of research. EU legislative actions, such as the EU Work-Life Balance Directive (WLBD) from 2019, are helping to implement fundamental changes from de jure to de facto social rights. This research suggests that the EU may emerge as a gender equality regulatory welfare state. More recently, Miró et al. (2024) point out that the introduction of new policy instruments with market-corrective rationales that go beyond the regulatory approach - such as the European Globalisation Adjustment Fund, the Youth Guarantee, the Just Transition Fund and the SURE - increasingly provide 'buffer mechanisms' to support national welfare states, strengthening the EU's capacities to act.

Addendum: the implications of socio-structural changes in the labour market for mass politics

Another increasingly relevant body of work focuses on the interaction between socio-structural transformations in the labour market and contemporary trends in political behaviour (Rueda, 2006; Kitschelt & Rehm, 2015; Häusermann & Kriesi, 2015; Rhem, 2009; Marx & Picot, 2013; Marx, 2014; Marx & Picot, 2020: 357). This complementary approach to comparative politics alters the order of variables traditionally used by dualization scholars: labour market inequality, employment protection, and the social and economic rights associated with employment directly explain and affect *mass politics* (Häusermann et al., 2020). For Lindvall & Rueda (2014), centre-left parties face an *insider-outsider dilemma*: regardless of their policy proposals' collective or target

developing and setting out a comprehensive list of policy and public policy recommendations, reflects on the lessons of the COVID-19 pandemic and the war in Ukraine and its repercussions, for example in relation to energy poverty. Available here: [doi:10.2767/35425](https://doi.org/10.2767/35425)

group, these decisions will have significant political consequences. They showed how, in Sweden, the dualization of the labour market and the electoral behaviour of insiders and outsiders influenced each party's share of the vote and the rise of the centre-right bloc between 1994 and 2010.

Within this theoretical and interpretative approach or framework, the *Symposium* coordinated by Silja Häusermann, Achim Kemmerling and David Rueda and published in *Political Science Research and Methods* (Volume 8 - Issue 2 - April 2020) has been particularly relevant. Why do left parties lose vote shares in times of economic crisis and hardship? Why is representation becoming more and more unequal? And why do workers vote for right-wing populist parties? Why do right-wing governments implement seemingly left-wing policies, such as labour market activation? The body of work that shapes this monographic section or "specialists' meeting" (a total of 7 articles) deepens comparative political research through sophisticated and rigorous answers to these questions, providing further evidence on the relevance and explanatory power of labour market inequality and its relation to political preferences and behaviour, electoral politics, representation and governance strategies in advanced capitalist democracies (especially in the OECD). As Vlandas (2020) points out, this approach "can help us make sense of the decline of the class vote that has taken place over the last three decades and the electoral difficulties of social democratic parties" (Vlandas, 2020: 367).

Mapping and summary of dualization evidence

This section delves into the impact of the growing dualization on access to social policy across geographical areas. It aims to show how dependent access to social policy is on the type of labour market situation of workers across the globe.

The form of employment dramatically affects individuals' ability to access social policies. Workers in non-standard employment arrangements (not a full-time permanent contract) have more difficulties or are directly excluded from accessing insurance-based schemes (ILO, 2016; Matsaganis et al., 2016). Spasova et al. (2017) conducted a comprehensive review in Europe, concluding that while insurance-based schemes like

pensions were primarily designed for formal sector workers, benefits such as family allowances, social assistance, and some healthcare services are accessible to all, regardless of employment status. Non-insurance-based schemes are financed by taxes and not work-related contributions, and even though employment status does not act as a targeting measure, other focalisation measures such as means-testing or citizenship are implemented. The form of employment has traditionally affected the legal entitlements to access social protection and the building-up of entitlements, disproportionately affecting women and younger workers (Spasova et al., 2017).

The concept of (de)commodification of labour, introduced by Esping-Andersen in 1990, evaluates the degree to which individuals and families can sustain a socially acceptable standard of living independently of the labour market. Decommodification in welfare access means evaluating how labour market participation influences access to various welfare types. For example, political systems can decommodify pensions by creating different types of pension programs so that every older-age individual can access them when the age eligibility requirement is met. Non-contributory or social pension programmes were made for this reason (Cruz-Martínez, 2019a, 2020, 2022). Similarly, housing can be decommodified through price controls and subsidies (Boelhouwer & Hoeckstra, 2012). Unemployment benefits can be decommodified by universalising the coverage to all unemployed workers, levelling up the benefits with a minimum replacement rate high enough to satisfy basic social needs, or relaxing the eligibility requirements.

Formal sector workers usually have better protection against social risks like sickness, injury, unemployment, disabilities, and old age. Conversely, informal sector workers often lack social security and depend on targeted assistance programs, if available. High levels of informality are common across a significant part of labour markets in low-and middle-income countries (Levy and Schady, 2013; La Porta and Shleifer, 2014), which highlights the importance of flexibilizing access to social policy programmes (van Ginneken, 1999). According to Charmes (2016), the informal economy accounts for more than 50% of non-agricultural employment in Sub-Saharan Africa (74%), Asia (65%) and Latin America (57%).

Domestic workers represent a vulnerable group facing significant challenges in accessing social security. Half (49.9%) of domestic workers globally are covered by at least one of the nine branches of social security according to the Social Security Convention 1952 (No. 102)⁸, while 60.7% of countries examined by the ILO (2023) provide coverage in at least one branch of social security. However, the coverage rates exhibit vast global disparities: in the Americas, Europe, and Central Asia, more than 97% of domestic workers are covered; in Africa, the rate is 63.2%; in Asia and the Pacific, it drops significantly to 27.9%; and in the Arab States, it is as low as 3.8%. These disparities indicate substantial geographical variations in the social protection of domestic workers. Additionally, a notable percentage of domestic workers are not entitled to maternity leave (46.5%) or maternity cash benefits (47.6%), a critical issue considering the majority of domestic workers are women. The problem is exacerbated by the informal nature of their employment, which leads to even higher de facto exclusions from maternity benefits and social security entitlements than the figures suggest (ibid.).

The latest flagship report by the ILO (2024a) highlights the challenge of informality in the Global South, underscoring the struggle for access to both decent work and social security.⁹ In the Arab states, a significant portion of newly created jobs are informal, lacking social protection for workers. The rate of informal employment in this region stands at 51 per cent as of 2023, predominantly impacting internally displaced people and refugees who often find themselves working in the informal economy without adequate social protection. Palestinian and Syrian refugees in Lebanon have 94 and 95 per cent rates of informal employment, respectively (ILO, 2021a). In Asia and the Pacific, the growth of non-standard forms of work (e.g., platform and gig economy) comes with limited access to social protection, irregular and low incomes, and job insecurity. Moreover, the high costs associated with non-wage labour in Continental Europe, especially in Southern Europe, drive the prevalence of "outsider" jobs that do not offer social protection (Häusermann and Schwander, 2012; Scharpf, 1997).

⁸ These are: (i) medical care, (ii) sickness, (iii) unemployment, (iv) old age, (v) employment injury, (vi) family responsibilities, (vii) maternity, (viii) invalidity, and (ix) survivors' benefits.

⁹ The informal sector encompasses all individuals, including both salaried workers and the self-employed, who lack social protection coverage (Alfers et al., 2017).

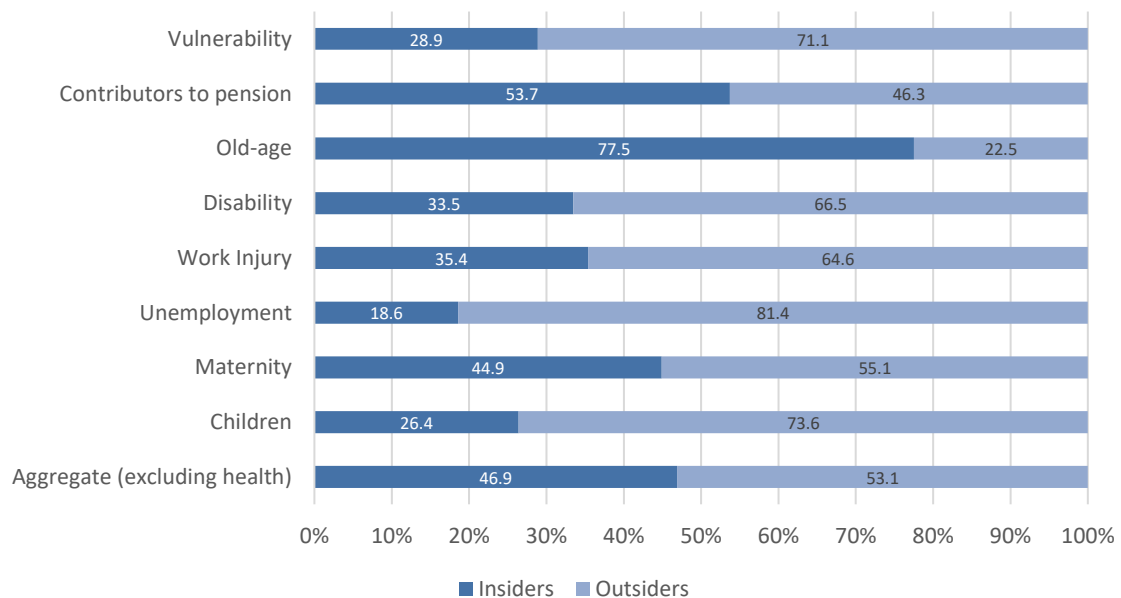
Welfare systems in Latin America were primarily established based on an occupational Bismarckian model. From the 1970s onwards, pension and healthcare coverage extended to nearly all insider workers (Natili & Puricelli, 2023). However, the size of outsiders remains considerable. Garay (2016) is a valuable source for understanding the evolution of the size and composition of outsiders in the region. Establishing social insurance and labour laws from the 1920s to the 1940s was the first step in formalising some categories of workers, thus providing them with social security entitlements. The size of outsiders (as a share of the total population) declined drastically between the 1950s and 1980s when it reached a plateau. Garay's research suggests that 40 to 60 per cent of the population, including workers and their dependents, are classified as outsiders lacking social security access. "High levels of electoral competition for the vote of outsiders and/or with large scale social mobilisation by coalitions of social movements and labour unions" are the two explanatory factors for the social policy expansion in the region and the inclusion of outsiders, mainly with social assistance non-contributory programmes (Garay, 2016:18).

The vulnerable population in India (coming from less affluent backgrounds, lower social strata, or lower education attainment) is more prone to informal employment (Shonchoy & Junankar, 2014). Therefore, they are more likely to be excluded from contributory social insurance. India's welfare system is dualistic, providing more generous transfers to civil servants (Karunarathne & Goswami, 2002). The example of Mexico clearly illustrates how dual social protection systems operate, with non-contributory programs funded by non-labour market sources for informal sector workers and contributory programs funded through payroll contributions for formal sector workers. This setup allows for the coexistence of informality and formality within the same households and even among individual workers, offering a broader perspective on the dynamics between formal and informal employment across Latin America (Melguizo et al., 2017). Through policy experiments, Bobba et al. (2018:1) show that universal reforms in the Mexican dual social protection systems "would decrease informality, incentivise schooling, and increase productivity at a relative fiscal cost similar to that generated by the current system." Therefore, further research should

examine if reforms pushing universalism might translate to lower informality rates, higher decommodification of welfare and weaker dualism in welfare states.

When discussing social protection coverage data, it's crucial to differentiate between statutory (or legal) coverage and effective coverage. Statutory coverage pertains to the coverage defined by national laws—essentially, the scope of social policies or the number of individuals theoretically covered under the law (de jure coverage). On the other hand, effective coverage examines the actual implementation of these laws—how well the legal provisions for social security are applied in practice (the degree to which national social security legislation is enforced) (ILO, 2021b). We can map the number of outsiders by focusing on effective coverage, which shows the share of the population which remains uncovered or not affiliated with social security systems.

Figure 1: Share of outsiders and insiders by function of social protection (effective coverage)



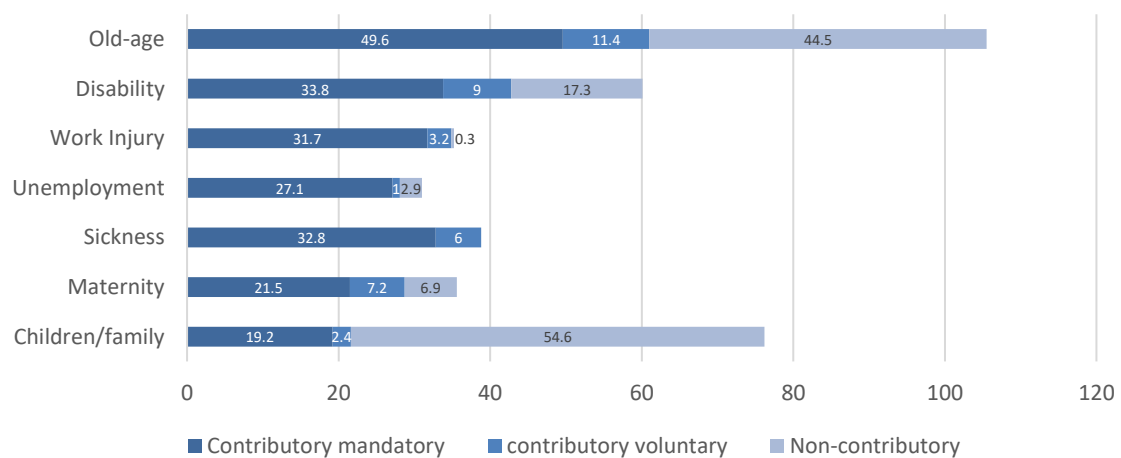
Note: The graph presents the effective coverage in each area. Insiders refer to the share of the population globally receiving at least one contributory or non-contributory cash benefit or actively contributing to at least one social security scheme. Contrariwise, outsiders refer to those without coverage.

Source: ILO (2024b)

As mentioned in the introduction, 53 per cent of the world population can be considered outsiders of social protection, illustrating a significant coverage gap. This figure drops to 34% for those not affiliated with any social health protection scheme, highlighting the disparity in coverage across different areas of social protection (ILO, 2021b). If we disaggregate the data by social protection function, we can see that unemployment (81.4%), children (73.6%) and vulnerability are the three areas with the highest share of outsiders. On the contrary, only 22.5% of people in old age (individuals without effective coverage) are outsiders. Further details and breakdowns of coverage across various areas of social protection can be found in Figure 1.

Figure 2 shows the legal coverage (statutory coverage) by social policy function. This allows us to see the share of people with (insiders) and without (outsiders) legal coverage in the seven functions highlighted by the World Social Protection Data Dashboards. The black bar refers to the share of people with legal coverage in contributory mandatory programs. The dark grey refers to contributory mandatory, and the light grey to non-contributory. As in effective coverage, social risks associated with old age are de jure provided to every older individual. We know that this legality does not translate to effective coverage. See the World Social Protection Data Dashboards website (ILO, 2024b) for data on social protection legal and effective coverage disaggregated by geographical area and function of social protection.

Figure 2: Legal coverage by function of social protection and type of program



Source: ILO (2024b)

How can countries include outsiders in the social protection coverage? We provide some successful practices highlighted by Alfery and colleagues (2017). Thailand, Rwanda, Ghana, and the Philippines have launched health insurance schemes that increase universal insurance-based coverage to incorporate outsiders of healthcare. China, for example, went from 3% health coverage in rural areas in 2003 to 97.5% in 2012 (Wang et al., 2014). Ghana and Kenya have targeted workers in the informal sector to contribute to a retirement fund voluntarily. Another approach is to target a specific category of workers in the informal sector, like domestic workers, by extending mandatory social security schemes. Countries have also reduced the size of outsiders by expanding social assistance coverage, mainly through cash transfers and non-contributory pension programs. Community organisations and NGOs have developed community schemes through what has been labelled self-help groups. SEWA (India) and BRAC (Bangladesh) provide services such as childcare, healthcare, pensions, and life insurance to millions. The “Red de Apoyo Mutuo” in Puerto Rico has organised over 15 mutual support centres around the archipelago to provide support to individuals in the aftermath of natural disasters and remains in place promoting self-management as a vehicle of social transformation (Villarrubia-Mendoza & Vélez-Vélez, 2020).

Conclusion and policy implications

Addressing deficits in decent work, social protection, and fundamental rights are not just important for achieving the SDGs, they are an essential part of the architecture of social justice.

(ILO Director-General Gilbert F. Houngbo)

The welfare states of the 21st century are confronted with traditional problems, such as structural unemployment, major issues, such as the fact that a considerable share of workers have lower quality jobs than a few decades ago, and the widening global gap between decent jobs and social protection. In this review, we show that the dualization of labour markets and social protection systems is a rather complex phenomenon, which for at least three decades has attracted the attention of public opinion, social scientists, public decision-makers and practitioners themselves. The conceptual and theoretical proposals, the analytical taxonomies, and the instruments for measuring these

processes show the good shape of this line of research. Nowadays it is constituted as a subfield of study merging comparative social policy and approaches centred on political economy. The literature seems to agree that a valid diagnosis of dualization processes requires considering several dimensions of analysis. We also consider that it is necessary to have an integrated framework on the determinants and conditioning factors of the dualization scope and intensity in different public policy sectors (especially in the social sphere), population groups (more or less vulnerable) and geographical areas. In this sense, our proposal focuses on the determinants of dualization trajectories (and their possible changes) and their scope, i.e. the factors, actors and institutions involved in this process in capitalist labour markets and social protection systems.

The sudden arrival of the COVID-19 pandemic in late 2019 and early 2020 shook governments worldwide, their economies, and the functioning of their labour markets. According to the *ILO Monitor on the World of Work* in 2023, the global employment gap stands at 453 million people, and 4 billion people would still be excluded from social protection - low-income countries will fall even further behind if no action is taken on employment and social protection (ILO, 2023). In this regard, institutional and policy responses need to be strengthened at both national (and sub-national) and international levels. This is the case of the *Global Accelerator* - launched by the UN Secretary-General in September 2021 - an initiative that seeks to raise awareness and direct investments by all actors (both public and private) to address this dualization process, helping to create millions of decent jobs, mainly in the green, digital and care economies, and to extend social protection to the billions of people who are currently excluded. Social partners should also urge governments and policymakers to support research and public action on the issue of dualization, for example, by encouraging active participation in the ILO-led *Global Coalition for Social Justice* - which brings together governments, employers and workers' organisations, international institutions, business, non-governmental organisations and academic institutions - generating political commitments, investment and concrete action on social justice on a global scale.

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