

**ERC Starting Grant
Synopsis of the research proposal**

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**Welfare state politics under pressure: Identifying
priorities, trade-offs and reform opportunities among
citizens, political and economic elites**

WELFAREPRIORITIES

Project duration: September 1st 2017 – August 31st 2022

Project proposal summary:

In times of austerity, the politics of the welfare state involve tough choices and even trade-offs: whose risks should benefit from social solidarity in a context of shrinking resources? Should the welfare state prioritize the needs of the elderly or those of the young? Those of people in the workforce or outside of the workforce? Of natives or of immigrants?

How countries answer these key questions depends on the welfare state *priorities* of citizens, political elites and economic elites. However, we know still very little about these priorities and their determinants, and we know even less about the mechanisms that foster support for social solidarity – i.e. support for inclusive social security beyond self-interest. This project wants to make use of recent methodological advances to investigate precisely these priorities and mechanisms.

The project will have two phases: the goal of the first phase is to identify the most salient distributive conflicts and welfare trade-offs in eight European countries. It includes an original data collection on social policy priorities among citizens, politicians, employers and trade unions (based on conjoint survey and interviews), as well as content analysis of the actual welfare politics in these countries.

The second phase builds on the findings of the first phase, but its objective is to go beyond conflict, towards coalitions. It will again combine conjoint surveys and content analysis to identify the factors that foster support for social policies among those social groups who are unlikely to benefit directly from these policies. The project is supposed to break new theoretical and methodological ground in comparative welfare state research. It conceptualizes and studies both the trade-offs and the potentials for coalitions, which will determine the fate of the European welfare state in the 21st century.

1. Motivation and research question

The European welfare state is one of the major social and political achievements of the twentieth century post-war era. It has supported democratic stability and has allowed shielding most citizens throughout Europe from the major risks of income loss and poverty, such as sickness, old age or unemployment. However, European welfare states have come under **tremendous political pressure** at the beginning of the 21st century, as increasing social demands for welfare benefits confront steadily growing pressure for financial consolidation and even retrenchment of welfare state expenditures (Pierson 2001).

Over the past two decades, **comparative welfare state research** has studied the development of social policy in response to these daunting challenges – such as demographic changes, labor market failures or the recent economic crisis. The focus of most studies was on the determinants of either social policy retrenchment, or social policy expansion in response to new social risks. However, a *key change* in the politics of the welfare state in the twenty-first century has to date hardly been addressed: **in times of increasing demands on the welfare state and – simultaneously – declining resources to meet these demands, welfare politics becomes the politics of trade-offs.** In other words: when the cake becomes smaller while more actors want or need a piece of it, political outcomes depend on **priorities**, they require hard choices, and **social solidarity is harder to build and sustain.**

Hence, while in the past, welfare state research mainly studied the **positions** of citizens, political parties and economic interest groups regarding individual social policies, in the future we should be studying **priorities**, i.e. the *relative importance* they attribute to different social policy strategies. This would allow identifying the key conflict lines in current welfare state politics, as well as the reforms that are most difficult to implement. **This project contributes to developing the theoretical and methodological tools that are required to advance welfare state research in this new direction.** A goal is also to gain insights on **reform opportunities** in times of austerity. Hence, the project will also investigate **the effectiveness of strategies to foster political support coalitions in favor of those citizens whose needs are politically weak.**

The research questions of this project are twofold:

1. What are the **salient distributive conflicts** and **welfare state trade-offs** among citizens, political and economic elites in the welfare regimes of Western Europe? How do these conflicts **differ between countries? Which welfare reform strategies foster support for the welfare state and which ones reduce support?** How do the welfare priorities of elites compare to those of citizens (**responsiveness**)?
2. Is **social solidarity** possible in times of austerity? **What mechanisms foster support** for social policies among those actors who are unlikely to benefit directly from these policies? Which **political coalition potentials** emerge between different social groups? **How do the analyzed mechanisms compare to the effectively used strategies by political elites in the different countries?**

2. Starting point of the literature

Comparative welfare state research is a dynamic research field, inspired and driven by the massive political, economic and social challenges and stakes at hand. Hence, over the past two decades, analyzing the **determinants of social policy retrenchment and financial consolidation** across countries was at the core of the comparative research agenda. This focus on retrenchment was strongly influenced by Paul Pierson's (1996, 2001) conceptualization of the "New Politics of the Welfare State". Pierson suggested that welfare state retrenchment being highly unpopular among citizens would make democratically elected elites refrain from massive cutbacks, despite mounting financial and demographic pressure. His theory predicted a convergence of party strategies on preserving existing benefit levels and structures, for the fear of electoral backlash. Over time, numerous studies explained **variation across countries and across policy fields** regarding the extent to which Pierson's prediction came true (for an overview, see e.g. Starke 2006; Jensen 2012). They all agreed, however, regarding their focus on one specific dependent variable: the retrenchment of the major existing social policy programs, such as old age pensions, unemployment benefits or sickness insurance. In the late 2000s, however, a new strand of comparative welfare research started to emerge alongside the retrenchment literature. These contributions are key for my project, but to date they remain very diverse and not integrated. They showed that **contrary to what Pierson had anticipated, welfare state retrenchment had not become "the only game in town"** (van Kersbergen et al. 2014): even though financial consolidation was indeed highly salient on the political agenda in most countries, **alternative dimensions of social policy reform** (some of them even expansive) also figured prominently on these

agendas. The most visible among them is the development of “**social investment policies**”, i.e. policies that invest in human capital (of children and adults), employability, and employment-creation rather than income replacement (Morel et al. 2011; Hemerijck 2013; Gingrich and Ansell 2015). Related to social investment, Bonoli (2005) showed that the coverage of **new social risks** (such as single parenthood, atypical employment or lacking childcare facilities) had gained relevance in the politics of the welfare state. Rueda (2005; 2006) brought the differential social policy demands of **labor market insiders and labor market outsiders** to the forefront; and an emerging strand of studies asked to what extent welfare states included **migrants** in the pool of welfare solidarity (e.g. Emmenegger and Careja 2012, Sainsbury 2012, Beramendi et al. 2015). Jointly, all these diverse contributions shed light on the fact that welfare politics had become “**multidimensional**”: we should not just ask if welfare states are generally expanded or retrenched, but for whom exactly, through which means - and at whose expense they are reformed. Reforms in one area of the welfare state may depend directly on reforms conducted in a different policy area.

The conceptualization of multidimensional welfare politics – i.e. the **political interdependencies** between different dimensions of social policy reform – is the **key theoretical innovation that provides the starting point for this project**. Forerunners to this idea were Pierson (2001), Bonoli (2000; 2001), as well as Bleses and Seeleib-Kaiser (2004), who started to analyze policy developments along several dimensions, without, however, linking them in an integrated way. Related studies confirmed that even public opinion regarding the welfare state is not unidimensional (e.g. van Oorschot and Meuleman 2012; Cavaille and Trump 2015; Roosma et al. 2013). **Beyond merely identifying these different dimensions**, Bonoli (2000), Rueda (2005), Häusermann (2010, 2012) and Bonoli and Natali (2012) started to conceptualize the actual **politics of multidimensionality** and – in some countries – identified **political exchange** between different dimensions.

However, even though there are by now quite a few contributions that theorize the multidimensionality of welfare reform, this literature to date still suffers from **two shortcomings**: A) the lack of a theoretical integration of the relevant dimensions of welfare politics *across policy fields* and B) an underdevelopment of the methodological tools required to study trade-offs in multidimensional welfare politics adequately (Busemeyer 2014). **The proposed project** addresses these shortcomings by making **use of recent methodological advances in the field of experimental survey research: conjoint analysis** asks respondents to compare hypothetical sets of policies (which are composed randomly on the basis of pre-defined attributes) and to choose which one they prefer. A high number of such comparisons and choices allows calculating the contribution of each element of the set towards overall support for the set (e.g. Hainmüller et al. 2014). In this ERC project, the objective is to develop conjoint analysis further to identify **which welfare reform strategies foster or undermine support for the welfare state as a whole**. The project should make conjoint designs a fruitful tool for comparative research on policy preference, more specifically welfare politics.

In the second part of the proposed project, I want to go beyond conflict in order to ask **what mechanisms foster social solidarity in the welfare state**. In the comparative welfare state literature, there is **one key answer to this question: coalitions of welfare state support are built on side-payments and compensation**. In other words: individuals and elites support social rights they will not benefit from directly **if they get material benefits in return for their support** (Esping-Andersen 1990; Baldwin 1992; Korpi and Palme 1998; von Kersbergen 1995). Even in times of retrenchment, the major explanatory factor for successful reform coalitions was compensation: exempting some groups from benefit cuts (Bonoli and Palier 2007) or compensating potential opponents with benefit increases in different areas of the welfare state (Häusermann 2010; Knotz and Lindvall 2015). Today, the main challenge is that **because of austerity, such positive-sum log-rolling may not be a viable strategy anymore**. Selective and targeted compensation may still be an effective tool to foster political support coalitions in some cases, but the leeway for compensation has clearly narrowed. This is why the second phase of the proposed project will theorize and investigate the effect of alternative mechanisms of coalition- and support-building, namely **framing** and **mediation**, which have to date received very little attention in the comparative welfare state.

3. Theory and Hypotheses

In order to answer the above research questions, the project develops an **integrated theoretical framework** which a) identifies the **main priorities and dimensions of distributive conflict** in current welfare politics, b) theorizes the **preferences of citizens, political and economic elites** regarding these dimensions of distributive conflict, as well as the determinants of these preferences and c) identifies the main potential **mechanisms that foster welfare support coalitions**.

The project has two parts. The first part identifies the welfare state priorities of the main involved actors and the country-specific conflict lines. The key dependent variable in this project is support for the welfare state. What are the policy strategies that foster or reduce support for the welfare state among different actors? In order to theorize these strategies and actor preferences regarding priorities, **the project identifies four key divides** in welfare politics in the 21st century, relative to which priorities will be investigated: 1) a **generational divide** (privileging the needs of children and the working age population *or* those of the elderly), 2) an **insider-outsider divide** (privileging welfare benefits based on, and proportional to, contributions of employed people *or* needs-based benefits), 3) a **multiculturalism divide** (privileging universal benefit eligibility for all *or* restrictions against immigrants) and 4) a **class divide** (financing the welfare state through more vs. less progressive taxation). These four divides reflect today's **key debates in the welfare state literature** regarding **social investment vs. social consumption policies** (Esping-Andersen et al. 2002; Morel et al. 2012; Hemerijck 2013; Busemeyer 2014; Beramendi et al. 2015), **dualization** (Rueda 2005; 2006; Bonoli 2013; Häusermann et al. 2014), **welfare state chauvinism** (Kitschelt and McGann 1997; Reeskens and van Oorschot 2012; Emmenegger and Careja 2012) and **class politics** over the progressivity of taxation (Manow 2010; Beramendi and Rueda 2007). The goal is to find out which welfare reform strategies (Investing in education, childcare or pensions? Securing insiders or outsiders? etc.) are prioritized by citizens and by elites (under the constraint that not all desirable outcomes can be achieved simultaneously), and how preferences regarding these priorities differ between social groups, as well as between citizens and elites.

Not all divides are necessarily salient and politicized in every country. **One may expect the saliency of the different trade-offs to depend on the existing welfare regime**, due to diverging institutional legacies and feedback effects (e.g. Esping-Andersen 1999; Svallfors 2012; Palier 2010; Campbell 2012; Kumlin and Stadelmann-Steffen 2014; Beramendi et al. 2015). One key argument in the policy feedback literature is that institutional legacies structure not only subsequent problem pressure, but they also shape presence, preferences and relative power of social groups and collective actors to (de)mobilize such problems. On this basis, and in terms of very preliminary hypotheses, the project suggests the multiculturalism divide to be most acute in the universalistic Nordic countries, whereas the generational divide should be more prominent in Continental and Southern Europe. Given the traditional insider-orientation of its labor market policies, Southern European countries are also likely to experience acute insider-outsider divides, whereas class conflict is likely to prevail more strongly in Anglo-Saxon countries. Within countries, the project will explore material self-interest vs. political values and ideology as determinants of citizens' and elites' preferences and priorities (e.g. Busemeyer 2014; Kitschelt and Rehm 2014 or Häusermann et al. 2014). In terms of **democratic responsiveness**, the project will compare the priorities of elites with those of the general public. A currently burgeoning research strand on "unequal representation" shows that **elites are particularly responsive to the demands and preferences of the higher social classes** (e.g. Bartels 2008; Gilens 2012; Giger et al. 2012; Rosset et al. 2013). Based on these findings, one may expect that the priorities of political elites reflect the priorities of upper social classes and economic elites more strongly than the priorities of lower classes.

The first part of the proposed project focuses on conflict. It will allow identifying which welfare reforms are the most controversial or the most contested. **The second part focuses on coalitions, determinants of solidarity and reform opportunities.** When do people **support welfare policies they do not benefit from directly**? When would they even support a **reallocation** of their own benefits to other social groups? In short: **what fosters social solidarity in a time of scarce resources**? These questions imply that the focus of this second phase is on **public opinion**, whereas the elites are relevant in terms of the **strategies** they can develop to build welfare coalitions for reform proposals. Above, I have argued that the "traditional" strategy for building welfare coalitions is through log-rolling and positive-sum compromises. Such compensations may still be a viable strategy for certain reforms, which is why the project will include them in the analysis. **Beyond compensation**, however, the project will investigate the effect of **two additional potential mechanisms**: the first relates to **framing**, i.e. to the political *message* that motivates the proposed measures (Marx and Schumacher 2015). For the project, it will be particularly relevant to see which motivations of reforms (such as motivations relative to social justice, functional/economic reform pressure, self-interest or cultural identity) respondents are receptive to. Second, the project will look at the effect of **mediation** on welfare reform support: to what extent does the *messenger*, or the endorsement of a measure by an actor, affect support (Martin and Swank 2012; Bechtel et al. 2013).

4. Methodology: research design and work plan

The proposed study includes a key hypothesis regarding the effect of institutional legacies on conflict patterns. For that reason, it is essential to **design it comparatively across different welfare regimes**. I propose to include **eight Western European countries**, which belong to different types of welfare regimes and have been studied extensively (so that our project can produce cumulative and comparable knowledge on these cases): Sweden and Denmark as Nordic regimes, the UK and Ireland as Anglo-Saxon regimes, Italy and Spain as Southern regimes, and Germany and the Netherlands as countries of the Continental regime model.

The first project phase requires original data collection on the preferences of citizens and elites. To prepare this data collection, the project will start with a **content analysis** of all **social policy reform proposals** that have been debated in the parliaments of the respective countries in the five years prior to the survey (*note as of January 2017: this data collection has already started and is well under way. It will be well advanced by the official start of the project in September 2017*). This analysis of secondary data (parliamentary archives, inventories of policy proposals etc.) will allow identifying the key welfare reform debates across the countries. This information is crucial to formulate the surveys in a substantially meaningful way. The subsequent implementation of a **representative public opinion survey in the eight countries** is one of the key elements of the project. For this project, it will be **indispensable to conduct an original survey**, since existing data sources fail to measure priorities and trade-offs (Giger and Nelson 2013). Conjoint analysis is a methodological tool that allows for measuring *choices* between similarly desirable goals. It is a specific type of experimental design, in which respondents are asked to evaluate hypothetical profiles composed of a set of *randomized* attributes. In our study, the “profile” corresponds to the welfare state profile, and the “attributes” correspond to specific policy strategies relative to the four potential divides developed above (privilege the needs of the young vs. the old, insiders vs. outsiders, migrants vs. natives and rich vs. poor). Such experiments have been widely used in marketing and sociological research (Green et al. 2001; Wallander 2009). Recently, conjoint analysis has been introduced to political science research (see Hainmueller et al. 2014; Bechtel and Scheve 2012; Hainmüller and Hopkins 2014, Hainmüller et al. 2015, Yamamoto 2016, Egami and Imai 2016). Concretely, the online survey will present respondents with 5-8 conjoint pairs of welfare state profiles and ask them to choose between the two and to indicate their support for each profile. In addition to the conjoint experiment, the public opinion survey will include questions regarding the socio-structural characteristics and ideological dispositions of the respondents (ca. 1000 respondents per country). Conjoint analysis is an **ideal tool to study trade-offs and priorities**, because it allows identifying the importance of different welfare state strategies through randomization. The project will therefore be able to assess the **relative importance that different groups of respondents attribute to the respective welfare strategies**. Beyond the attitudes of citizens, the project also needs data on the **positions and preferences of political and economic elites**, in order to assess democratic representativeness. It will most likely not be possible to file an identical conjoint survey among elite respondents, since there are too few respondents. Hence, the project will rely on the second best option and measure priorities by asking elite respondents **ranking questions** regarding the different desirable reform strategies (identically worded than in the public opinion survey). For the **elite online-survey**, the project will include all members of the national parliaments, as well as representatives of the major trade unions and employer organizations.

For the second phase of the project, the focus is on public opinion and on the mechanisms that may foster welfare state support. From the first survey wave, we will have insights into the main conflicts. To examine determinants of support for particularly contested policies (imagine investments in childcare services, or active labor market policies for outsiders), the project will field a **second conjoint survey** in which the “profiles” to be compared are not the entire welfare state profiles anymore, but the **profiles of particular reform packages**. Such packages include the particular measure (e.g. investment in childcare services), as well as a series of additional elements that may act as mechanisms fostering support for the contested reform (compensating measures that accompany the reform, different framing efforts, or endorsements by different actors). By again filing pairwise comparisons of such profiles in an analogous way to the procedure outlined above, it will be possible to identify **to what extent the different mechanisms enhance support for the measure and among whom**. For this second phase, we do *not* file an analogous elite survey, as our focus is on potential social coalitions as a dependent variable, but the project will compare the findings of the experimental survey to the **actually applied strategies by political actors**.

Hence, the project includes a parallel content analysis of the strategies and arguments advanced by political parties and economic interest organizations in a range of **recent major welfare reforms in each country**.

5. Plan of work / team

The project work is divided up into several work packages with the corresponding distribution of responsibilities among staff. WP 1-3 and WP 5-6 focus on data collection, whereas WP4 and WP7 represent milestones of the project in terms of data analysis, interpretation and publication/diffusion of findings.

Year	Project phase	Work packages and main responsibilities	
1	I Conflict	WP1: Data - Content analysis of reform proposals (months 1-12) and preparation of the public opinion & elite survey (content and call for tender regarding the p.o. survey)	WP2: Data - Conjoint surveys on welfare priorities (months 7-24)
2		WP3: Data - Elite survey/interviews (months 13-24)	
3		WP4: Analysis of data on welfare priorities and responsiveness between elites and public, preparation of publications on the findings of the first project phase, including workshops etc (months 25-36+)	
4	II Coalitions	WP5: Data - Content analysis of arguments and strategies in welfare reforms (months 37-48)	WP6: Data - Conjoint surveys (2nd wave) on mechanisms of solidarity (months 37-48)
5		WP7: Analysis of data from WP5 and WP6; Write-up of final publications (book and articles); book workshop (months 49-60)	

The project team will consist of the **principal investigator, one post-doctoral researcher and 1 or 2 doctoral students, as well as research assistants at various stages of the project.**

The results of the project will be published in the form of articles in international peer-reviewed journals. Given the linkages between the different parts of the project (survey analysis, citizen-elite comparison, content analysis), the final results will also be published in a research monograph at the end of the project.

6. Contribution of the project, high risk/high gain strategy and feasibility

The proposed project has a **programmatic aim for welfare state research**, as it argues that the politics of the welfare state should be seen in a new light: we should focus less on specific, individual policy strategies. Rather, we need to conceptualize the politics of the welfare state in terms of **priorities, trade-offs and coalitional dynamics** between groups with very different visions of what the welfare state can and should do. Given this programmatic aim, **the project wants to break new scientific ground in theoretical as well as methodological ways**: it conceptualizes welfare politics as the **politics of trade-offs**, not the politics of unconstrained preferences. It develops **conjoint analysis** as a key methodological tool to deal with such a new perspective. The project also bridges a long-standing, unfortunate divide in the comparative welfare politics literature between research on elite politics and mass politics by **studying public opinion, the preferences of political parties, and those of economic interest groups jointly**. Substantively, the project **integrates social investment, as well as the financing/ taxation side of the welfare state into an encompassing perspective on social policy analysis**, while they were so far studied separately. And finally,

the project aims at generating important and **policy-relevant knowledge on citizens' welfare priorities, responsiveness between elites and the public, as well as promising strategies to foster social solidarity and political coalitions for welfare state reform.**

It is also a **high risk/high gain project**, which is the reason it is submitted to the ERC. The risk consists in the scope and ambition of the theoretical set-up (investigating the distributive structure of the welfare state as a whole, not a single policy field), and in the ambitious methodological strategy: the project will implement various experimental survey designs that have to date rarely been used in comparative welfare state research, and it implies the collection of elite data on welfare priorities in no less than eight countries. Hence, the ambition of the project is also to explore the extent to which conjoint surveys (or factorial surveys more generally) can be useful tool for (welfare) policy research. In preparation of this grant application, I have therefore developed conjoint surveys on pension politics in Switzerland with my team, in order more familiar with the tool and with the process of survey design and implementation (see Häusermann et al. 2015) and I have hosted an international workshop on conjoint designs in Zurich in January 2017 (<http://www.ipz.uzh.ch/de/projects/conjoint-workshop>).

The potential gain from the project is substantial: it may contribute to **changing the way we conceptualize welfare politics** in political science, to **establishing conjoint analysis as a fruitful methodological tool** in the field and – most importantly – to **understanding both the trade-offs European welfare states face today and the ways to foster social solidarity to overcome these trade-offs.**

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