**A Crisis in Welfare Legitimacy? A review of citizens’ support for the welfare state in times of change**

“*Attitudes are coins that do not readily melt” (Schumpeter, 1942, p. 12).*

*“Good Science is not futurology; we should always be humble about predicting the path ahead on the basis of what we know about the one already trodden” (Pawson, 2006. p. 1)*

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**Abstract:**

As governments in advanced capitalist countries respond to pressures on their welfare states by reforming their welfare systems, many scholars have asked how this impacts the legitimacy of welfare states. Pressures are both internal and external at social, political and economic levels. The pressures and governments’ responses to them have led many to ask how far citizens continue to support government intervention in areas of Social Policy, and to what extent these changes may impact the stability of welfare states. The number of cross-national surveys is steadily increasing and many studies examine developments in social provision and public attitudes towards welfare states. However, there is a lack of a clear and comprehensive overview of knowledge about tendencies in support for the welfare state in light of these pressures. This thesis uses tools from the systematic review tradition and draws on principles and tools from realist synthesis to achieve a comprehensive and systematic review of current knowledge on support for the welfare state in light of these pressures in Europe, the USA, Canada, Australia and New Zealand. Thus the project makes an original contribution to knowledge through assessing the use of an innovative method in Social Policy, as well as through shedding new light on the trends and dynamics at play in citizens’ support for the welfare state in a time where welfare state are facing many challenges.

The project maps current knowledge, and explores ways in which tools from systematic review and realist synthesis may be used in the Social Sciences. It is argued that welfare state attitudes as an area, is wide-ranging and diverse, something which causes problems for the emphasis in the Systematic Review tradition on replication, homogeneity and hierarchies. To illustrate ways in which systematic review tools may be used in a successful way in Social Policy, this thesis further include in-depth analyses of the area of immigration and redistribution. These illustrations show how systematic review tools may be used to further our understanding trends and explanations of support for the welfare state.

The thesis argues that the adapted and innovative approach to review taken here can help us not only identify what we know and don’t know, but can help inform and suggest ways in which we can further increase our understanding of the dynamics in the area. This is exemplified in the thesis through the finding that further attention to operationalization and to the difference between values and attitudes is needed. This is supported by findings across included studies, as there are differences in studies’ conclusions depending on how support for the welfare state is measured. These two aspects are identified as important contributions to further knowledge in the area. It is argued that this innovative approach also enhances our understanding of individual-level trends and their relationship with macro factors such as immigration. Findings suggest that trends at individual-level are different depending on which measure of support for welfare states is used, whilst changes and correlations with macro factors vary depending on different levels of generality of values and attitudes. Scholars’ arguments relating to the direction and impact of changes in macro factors such as the current economic recession must take into account the level of generality of values and attitudes.

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# Chapter 1. Introduction

**Background**

Governments in advanced capitalist countries are dealing with a range of changes stemming from internal and external pressures at social, political and economic levels. These include demographic and labour market changes as well as more contested trends such as increased immigration and family changes. As Taylor-Gooby (2004) claims, these **“**present formidable challenges to the current welfare settlement” (Taylor-Gooby 2004, p. 1). In light of these challenges, some argue that welfare states need to renegotiate policies and their social contracts with their citizens to ensure welfare states are sustainable. Parallel to, and maybe in response to the mounting pressures faced by welfare states and the increased importance given to understanding citizens’ support for welfare states, an increasing number of cross-national surveys have been established. As a result a vast amount of studies have been conducted, analysing both welfare states’ responses and attitudes towards welfare. At the same time there has been considerable technological developments enabling rapid structured systematic reviews. However, there is a lack of a systematic and comprehensive overview of tendencies in support for the welfare state in light of these pressures, an issue this project aims to address.

Through a critical evaluation of the use of tools from the systematic review this thesis takes an approach that also draws on principles from realist synthesis theory. Overall, the thesis takes a middle position between advocates and critics of the systematic review approach, and argues that systematic review is of value in providing an overview of research and also in tracing issues in the way knowledge develops within an academic field. In other words it is argued that tools from the systematic review tradition are useful in helping to achieve a comprehensive overview of current knowledge. This is the case if authors and scholars take into account and adapt these tools to ensure that a review values the heterogeneity and particular features of the Social Sciences. Furthermore, it cannot substitute theory, nor is it “a royal road to knowledge. It is simply a convenient technique for the review of large numbers of studies” (Sundberg & Taylor-Gooby, 2013, p. 421).

**Introducing the project**

The project contributes to knowledge in several ways. Firstly, it contributes to knowledge by embarking on a mapping exercise of what is known and not known, identifying causal mechanisms found in current knowledge about the relationship between support for welfare states and welfare pressures. Second, the use of systematic review tools enables a critical analysis of operationalization and a focus on the importance of distinguishing between the key concepts, of values and attitudes. The project includes studies focusing on Europe, and also the USA, Canada, Australia and New Zealand when compared to European countries. The project contributes to better theoretical explanations of micro-level variations and changes over time by differentiating between levels of generality of values and attitudes, shortcomings of the field up until today. Third, the project is forward looking as it develops and critically assesses a new approach (adapting tools from the systematic review tradition) that may have potential for use by others. In other words, whilst criticising a traditional systematic review approach, the thesis can be argued to sit in the middle between a traditional systematic review and its critics. The thesis includes in-depth analyses of trends and explanations within the areas of redistribution and immigration. This is done so as to illustrate ways in which systematic review and realist synthesis tools can be used in the area, and build patterns of explanations expanding existing theoretical frameworks outlined in the theory chapter. Thus, the focus on redistribution and immigration are used to exemplify new methods that can help fill the gap in current research.

Although it is argued that systematic review techniques are relevant and may help enhance academic knowledge, a range of issues related to the use of systematic review in the Social Sciences have been identified based on the findings. These include aspects related to some of the basic methodological principles of systematic review such as homogeneity and a predetermined research processes, and practical issues related to the diversity of the Social Sciences. These needs to be taken into account to successfully carry out a systematic review in the area. Moreover, it is argued that by building on a fuller knowledge of what is known and not known within and across studies better theoretical perspective*s* can be constructed which can then be tested empirically.

As will be seen in the thesis, there are high levels of support for some government intervention in the area of welfare, but the level and explanations of support depend on the measure used. A need for more emphasis on and critical discussion of operationalization as well as greater importance given to the level of generality (by better differentiation between values, attitudes and beliefs) are thus two important findings of the thesis. In other words further value needs to be given to what attitudes are, and how they are measured. Furthermore, it is argued that the relationship between explanatory factors at micro and macro level and changes in support over time needs further exploration. Neither of these has been studied to sufficient level for this thesis to draw any significant conclusions about them.

Tools from the systematic review tradition are used with the purpose of achieving a comprehensive selection and review of conducted studies in a timely manner. However, realist synthesis approaches are also used as iteration and heterogeneity is argued to be important to appreciate the diversity of studies found in the area. It is clear that the scope of the project is wide ranging, an aspect that will be taken into account in every stage of the process to ensure that it is manageable within the timeframe without excluding too many studies so as to retain the coverage of studies within the area.

**Aims and scope**

Summary of the study

Overall this project aims to contribute to knowledge by identifying not only trends in current knowledge about support for welfare states in Europe, and USA, Canada, Australia and New Zealand when compared to European countries but also contribute to discussions on how systematic review and realist synthesis can be used in the Social Sciences. Due to the vast number of areas covered by attitudes to welfare, as well as the importance of understanding variations in citizens’ support for the welfare state, the project analyses support for the welfare state rather than welfare state attitudes more broadly. Only cross-national studies published/written in English between 1994 and 2010 will be included. A discussion of what challenges the welfare states face and approaches to support for the welfare state will follow in the literature review. The research aims of the project are:

Research objectives

1. *Gauge knowledge (what we know and don’t know) and identify the explanatory power of different theories found in the area of support for the welfare state related to the pressures developed welfare states in Europe, USA, Canada, Australia and New Zealand are facing.*
2. *Identify and develop hypotheses and potential new approaches produced through the use of an adapted systematic review methodology (include knowledge produced by the quality appraisal of current studies)*
3. *Analyse and provide new explanations of the relations between immigration and support for the welfare state as well as trends in attitudes towards redistribution as a measure of support for the welfare state, by using new approaches and hypotheses from the findings from research objectives 1 and 2 and carrying out in depth meta-analysis****.***

Time coverage

The restriction to studies published/written between 1994 and 2010 has been chosen based on various factors. Firstly, the year 1994 was chosen as it was the year the Commission of the European Community published their White Paper on Social Policy which “set out the main lines of action at the Union level for the coming years” (COM 1994, p.1). Both this White Paper and the European Council held in Essen the same year put unemployment as the top priority for the European Union’s Social Policy (COM 1994, p. 4; Taylor-Gooby 2004a, p. 188). The Commission “stressed its own role as an agent for mutual policy learning (Taylor-Gooby 2004a, 186) with the main focus being creation of employment. Thus, with Europe being amongst the main geographical spaces studied, EU policies are seen from 1994 to create a separate set of pressures on national Social Policy, and thus set the scene for understanding support for the welfare state within the context of specific countries, the region as a whole and the possible influence of regional institutions’ policies.

Secondly, by choosing 1994 rather than a later date we also allow for more waves of surveys to have been conducted, together with more areas covered as surveys may emphasise different topics in each wave. The International Social Survey Programme (ISSP) is an example of this approach, with surveys focussing on different themes in different years i.e. the first wave on the role of government, which is very important for this study, was conducted in 1985, the second wave in 1990 and the third in 1996. The time limit has also been chosen to allow for information having been accumulated, permitting comparisons of tendencies over time. This also enables more information to be included from surveys with infrequent waves such as the European Values Survey, which conducted the interviews for its first wave in 1981, second in 1990 and third in 1999. Fourthly, by choosing 1994 we allow time for authors and theories to react to Esping-Andersen’s (1990) canon within the welfare state area with his focus on the welfare state regimes which can be used as a starting point for evaluating whether or not type of welfare state institutions influence attitudes to social welfare. Lastly, a time limit had to be chosen to contain the amount of information in the study to a manageable amount. The end point was set to 2010. This year was chosen to ensure that enough time was left to assess changes over time from the starting point, but also to make sure that the study was able to include all studies up until the end point. If a later end-point had been chosen updated searches across all databases would have had to be carried out.

**Geographical areas covered**

The area of study of this project is limited to European countries, and USA, Canada, Australia and New Zealand when compared to one or more European countries. The inclusion of further areas would create problems of comparability since certain geographical areas (especially Latin-America, Africa and areas of Asia) are not covered the in major databases and included in the large cross-national surveys. There are further reasons for this choice of geographical coverage, all ensuring that the project will provide a secure academic foundation for later more extensive work.

Firstly, as the focus of this study is support for the welfare state the countries were chosen as the original focus of both theories of welfare states and the origin the welfare state institutions themselves that were Western Europe and the Anglo-Saxon countries. As an example, both Esping-Andersen, with his categorisation of welfare state regimes as liberal, corporatist and social democratic, (Esping-Andersen, 1990, pp.26-27) and the ‘varieties of capitalism’ approach (Hall & Soskice 2003) focus on these countries, underlining the importance given to these geographical areas by different schools of thought. There is substantial knowledge produced around welfare state regime categories, and also about attitudes within the welfare states. However the latter has been substantially less categorised. As a result, this project may compare the established knowledge about welfare state regimes in Europe and Anglo-Saxon countries with a new categorisation of attitudes to welfare based on the same geographical area. This might help create greater understanding of tendencies in the societies studied, by analysis of contextual factors such as welfare states regime types themselves as well as developing the theories and typology in the area further.

A second factor driving the geographical selection of countries is that, as with the time limit, the project seeks to understand the impact of the EU. The direction of the EU’s European social model can since then 1994 (see discussion under time coverage) be argued to be based on both solidarity and competitiveness. However, as we have seen over later years, economic crises and an economic emphasis can be argued to have taken precedence in some situations (Falkner, 2010). To focus on Europe means to focus on European countries within the EU. This enables us to better understand how support for the welfare state vary and might be impacted by this institution and indeed what tendencies have been found which are related to the EU. The focus on the EU is also a decisive driver for including the same borders to the east in Europe as that of the EU.

Thirdly, it was deemed important to include countries with developed welfare states in Europe as the citizens of these countries have had experiences with welfare states, and might have been influenced by and influences its institutions. Developed welfare states also face similar challenges, thus limiting the selection to these enable a better understanding of attitudes related to a more uniform set of challenges. In addition to member states of the EU, Norway, Iceland, Lichtenstein and Switzerland will be included. The European countries excluded from the study i.e. Ukraine, Belarus, Croatia, Turkey and Russia, are countries where public spending on welfare is either low or has been low until very recently. Furthermore, some would claim that countries such as Russia, Ukraine and Belarus, are still influenced by the aftermath of socialism. Lastly, and more pragmatically, one can argue that there is better comparable data available about attitudes in the countries chosen, which enables more studies to have been conducted.

Language coverage

Only studies written in English will be included as it is assumed that most of the important articles are published in English. Furthermore, the most influential journals are published in English. In addition, the reviewer will not be able to read all other languages and thus would only be able to include studies written in a few languages represented amongst the included countries, which would bias the study towards those countries. Cross-national studies are the focus of the project as there is a focus on how institutional settings may influence and shape attitudes. In addition, the project seeks to understand how attitudes related to challenges and welfare states in different countries vary as opposed to understanding how these vary within one country over time.

**Main findings**

Whilst some worry about the legitimacy and support for welfare states in light of recent economic and political crises, this thesis finds that even though levels of support depends on the measure used, there are overall high levels of support for some government responsibility and intervention in the area of Social Policy (aim 1). In terms of confirmed explanatory patterns there is support for self-interest explanations, but also for the importance of societal level context as well as norms and socialisation (aim 3). In terms of the influence of macro-level context of a country, it is found that citizens’ attitudes towards the welfare states are influenced by societal context, and this is furthermore interrelated with individual characteristics (aim 2). Thus, it is found that individuals are related to and react to the context within which they live, in other words, a dynamic explanation of individuals’ attitudes. Attitudes can be claimed to be formed and impacted by institutions and context, and individuals, consciously or not, react to and adapt their attitudes to these. We should thus take into account the interactive relationships between macro level changes such as immigration and micro level variables. This is exemplified by the finding that education as a socialising effect, is found to be important across studies when studying the effect of immigration, however does not have the same effect in studies analysing other pressures. In other words the use of systematic review tools can help us identify areas for further study, but also gives an opportunity to critically assess relationships between variables.

As in the overall support chapter, operationalization was found to matter, when carrying out a more in-depth analysis of redistribution as a support for the welfare state pressure and immigration as a pressure. Thus, overall the thesis finds that operationalization is crucial as effects differ depending on measurements used. Thus, further critical discussion of operationalization and measurement is needed, both theoretical and empirical about what we are measuring. This was in particular shown to hold true when discussing redistribution, a measure studied in a range of ways and subject to two kinds of problem. Firstly, it is often assumed that it is a measure of support for the welfare state even if citizens do not necessarily make link redistribution to inclusive welfare. Secondly, there is a range of measurements of the concept leading to different findings. A comparable issue of measurement is important in the operationalization of immigration and ethnic diversity. Discussion of operationalization should also make a clearer distinction between attitudes and values and what aspect of support we focus on empirically. In other words, not only should there be a better discussion of the operationalization, this process should show a greater awareness of whether or not we are measuring values, beliefs or attitudes. These aspects are illustrated further in chapter 6 and 7 that discusses redistribution and immigration. Related to this is the finding that effects vary depending on levels of generality, a theoretical framework that helps us understand the differences between attitudes and deeper-seated values (Haller, 2002). In the chapter focusing on immigration, by use of this approach, it is found that contact theory and positive impact of higher immigration (e.g. Van Oorschot, 2008) are found to be confirmed when it comes to an attitude such as concern for the living condition of immigrants. On the other hand, self-interest and negative impacts of immigration levels is found when it comes to a deeper-seated value such as redistribution. Overall, both in terms of immigration and redistribution a complex picture is found where there is evidence for a ‘political man’ changing attitudes as a response to changing contexts. Self-interest explanations seem to be confirmed. However contextual factors influence what is a person’s self-interest as well as creating a socialising framework that impacts citizens. The chapter on redistribution highlights this in particular as different pressures, e.g. unemployment rates and immigration, impact individuals differently. Where immigration may have a positive impact in some respect, higher unemployment rate leads to higher demand for redistribution by groups at risk of being impacted by these.

Overall, this thesis shows how systematic review methods may help synthesize existing knowledge as a basis for further analysis. Thus, it is positioned in a middle position between promoters and critics of the traditional systematic review approach. It highlights a range of issues and trends identified through the use of systematic review to analyse support for the welfare state. It is argued, that whilst the systematic review approach provides tools for achieving a comprehensive overview of research the role of replication, judgement, hierarchy of evidence and predicated research processes need to be critically discussed. Furthermore, approaches highlighting iterative processes, context and heterogeneity should be taken into account to embark on a successful systematic review in the Social Sciences (see Sundberg & Taylor-Gooby, 2013 for further discussion). It explores how systematic review tools can be used and contributes to our knowledge by giving an overall overview of what we know as well as help us highlight theoretical and methodological strengths and weaknesses in the studies in a given area. In other words it is argued through illustrations of uses of an adapted approach to systematic review, one can get an overview of a field. The project’s adapted approach has also helped identify issues around limitations of available data and surveys, operationalization and lack of theorisation.

**Contribution to knowledge**

Overall the project hopes to contribute towards a greater understanding of existing knowledge about what mechanisms and trends are at play in a context of a changing social reality. It also contributes to methodological knowledge in assessing the use of tools from the systematic review tradition and suggests approaches that will help future reviewers to carry out successful reviews that address the particular context of the Social Sciences. The project thus maps existing knowledge in a way that can enable more informed research to be conducted. The thesis also points researchers in new directions for future research that may help shed light on new phenomena and areas. The findings suggest a need for future studies to explore and critically discuss the methodological and theoretical issues such as operationalization and greater emphasis on mediation, moderation and confounding variables. For further knowledge enhancement it is also argued that we need more studies analysing changes over time.

**What follows**

The next chapter will outline the theoretical framework used in the thesis. This is framed in a way that aims to develop an understanding of measurements and explanations of support for the welfare state, and it briefly sets out some of the pressures welfare states are facing. Following the theory chapter the methodological approach is discussed. This is then followed by the findings chapters that show how the project has come to the above-mentioned conclusions and findings.

# Chapter 2. Theoretical framework

**Introduction**

Hendricks & Powell (2009) argue that it might a bit banal to say “that the world is a different place than it was just a few decades ago” (Hendrikcs & Powell, 2009, p.3), however, changes are occurring, and many argue that they are putting pressure on established welfare systems. These changes are widely discussed and emphasised both academically and in the wider society. For the welfare state the changes raise questions such as; how social needs may change, what pressures are created for welfare states and how welfare states, citizens and politicians respond to these changes and pressures. To study potential changes in citizens’ support for institutions such as the welfare state is important due to several possible directions of influence a change. On the one hand because politicians need to decide how to respond to these challenges, decisions, which may be influenced by attitudes and behaviour found amongst citizens. On the other hand reforms and changes in institutions, which may be seen as institutionalised norms, may in themselves impact upon citizens’ values. Reforms and politics may influence through political rhetoric and campaigns as well as media coverage. The latter will not be directly studied in this project, but is an area for future studies. As one may see institutions such as the welfare state as a legitimiser and stabiliser (Mau & Veghte, 2007), politically, socially and economically, it is crucial to understand citizens’ attitudes and values. In particular, the process of re-negotiation of the shape, values and goals of a welfare state and citizens’ support for it in light of pressures and changes in society.

The following chapter will outline and critically discuss the context and theoretical framework to be used in the analysis of the project, with an emphasis on the different possible explanations of trends in support for the welfare state. This framework will be used to establish patterns of explanations found in the included studies. The reason for an emphasis on a framework for analysis is that the thesis is exploring and making use of tools from systematic review and realist synthesis traditions and a discussion of the approaches made in the area will also be part of the synthesis. Thus, the following will outline a framework for analysis rather than an in-depth literature common to literature reviews provided when using other types of methods. Again, the project will explore the use of these tools by focusing on support for the welfare state in general, but will also make use of redistribution and immigrations to illustrate the use of these tools. This is because these are two areas that are amongst the more commonly read studies. Furthermore, findings show that they illustrate typical issues and explanatory patterns in terms of explaining support for the welfare state that we tend to find in the area.

The chapter can be divided in to four sections; firstly, it discusses attitudes generally, secondly it goes on to discuss theoretical approaches to support for the welfare state, thirdly it gives an overview of the changing context in which welfare states exist (welfare pressures) and it ends with a discussion of how one of these welfare pressures has been found to impact support for welfare states in previous studies. Changes that will be included amongst the welfare pressures, and which attitudes may be impacted by are Economic (for example labour market shifts, economic globalisation and competition, crisis), Political (political globalisation, legitimization problems and declining trust in politicians) and Social (family change and demography) changes.

This project is positioned in line with those arguing that changes can have an impact on welfare state support as well as the welfare state itself. In light of this we need to create a greater understanding of how citizen’s support changes, if at all and whether such changes have an impact on welfare state legitimacy. Support is important to academics and politicians alike as welfare state support and legitimacy may influence policies and vice versa. Support is also crucial to maintaining welfare states as welfare states are built on sentiments of mutual responsibilities between citizens and the state, and a decrease in the cohesion and social ties may affect this balance and thus for example affect policies.

The systematic review tradition’s focus on providing comprehensive reviews of current knowledge is tightly linked to, and driven by, changes in social needs as is the need to understand potential changes in support for the welfare state and theories analysing responses to welfare pressures. An example of these changes are changes occurring in our societies today such as globalisation, which gives rise to new social needs and necessitates government responses. Definitions of attitudes will be explored in the chapter but for now the concept is understood as reactions to and beliefs about an object (Oskamp, 1991); in this case the welfare state and its parts. Attitudes are argued to be important for a range of reasons, which will be briefly covered in this chapter; an example of which is Easton’s (1975) input and output model of political life where he highlights the importance of demands and support for policies and decision-making.

The first part of the chapter discusses and outlines approaches to attitudes, and how studies of support and attitudes can be divided into different levels of generality based on what type of attitude and support is studied, and it outlines how these may be distinguished in the synthesis. The argument is that different levels, societal values, situational values and attitudes may vary to different degrees and in different ways in relation to the emerging changes. The hypothesis is also that societal values are more stable than attitudes and that difference between levels of generality is poorly covered in the literature, and that this may explain disparate findings. In other words it is argued in the thesis that operationalization and conceptualisation of support for the welfare state will influence findings, and this argument is explored and tested in the findings chapters.

In these sections macro-level explanations such as the impact of welfare state regimes and institutional explanations, including dynamic institutionalist theories (Larsen 2006; Mau, 2003, 2004) emphasising a more dynamic relationship between attitudes and institutional structures, will be presented. The dynamic aspect of institutions is something Esping-Andersen (1990), and power resource theory, to some extent addressed through the idea that once a particular policy is put into practice it tends to reinforce the interests of those who benefit from it, so that it strengthens the power resources for maintaining that policy. However, the dynamic institutionalism theory goes beyond power resource theory. An example of this approach is argued by Mau (2003) who argues “different welfare systems inculcate different norms of reciprocity and hence create different ‘moral economies’ of the welfare state: while targeted systems tend to demand of citizens that welfare recipients should be docile and grateful and do their best to move away from their current ‘needy’ status, a universal system gives rise to questions about how the larger collectivity is able to solve its problems of security and sustenance” (Svallfors, 2010, p. 246). Thus, we see a more dynamic approach that goes further than dynamics being driven by instrumental and self-interested support for a theory where moral economies of reciprocity are created. Here individuals are closer to a ‘political man’ (Larsen, 2006) or ‘public spirited citizen’ (Mau, 2003) rather than ‘homo economicus’. As a result we get a more complex picture where individuals’ support for the welfare state is related not only to the regime- dependent institutional reality, norms and self-interest but also to their position as ‘embedded individuals’ influenced by experiences and norms in family relations and social networks.

In addition to discussing macro level explanations, micro-level explanations such as self-interest and socialisation are outlined. The overall argument is that there are gaps in current research, especially in terms of a lack of micro-level theoretical explanations that go beyond descriptive explanations of self-interest and socialisation and in terms of explanation of changes over time. Micro-level explanations are often studied in relation to macro-level explanations, and the argument in this thesis is that the two actually interact, as argued by the dynamic institutionalist school of thought. The section concludes by summarizing the main theoretical framework for analysis and the hypotheses and patterns of explanation that will be used to build patterns of explanations in the analysis of the project.

The chapter goes on to discuss what changes are covered and emphasised in the literature as having an impact on Western welfare states. As this project reviews current knowledge a comprehensive approach is taken, thus the review includes a broad range of changes and pressures which by some authors may not be considered as equally important as other pressures (e.g. family changes). As mentioned the thesis will carry out an in-depth examination of redistribution as a measure of support for the welfare state and immigration as a welfare pressure. These are chosen as illustrations of how tools from systematic review and realist synthesis may be used to synthesise and give a review of knowledge in an area.

Redistribution, chapter 6, is chosen as it represents the largest group of studies on support for the welfare state, and it encompasses issues and trends found across the measurements used when authors operationalize support for the welfare state. Immigration is an area that in this project is considered to be of high significance amongst the current changes and pressures western welfare states are facing. This is due to the continued importance it is given in the media, and by academics and politicians in Western democracies. Thus, immigration and welfare support will be studied in-depth in chapter 7, and a brief overview of approaches taken in the area will be discussed in this chapter. This in-depth analysis is driven both by the importance of immigration as a social and political issue in Western society and the forward looking nature of the project where we aim to test hypotheses and theories developed through the use systematic review tools. When discussing changes, the focus will be on their impact on and relation to welfare state support, as welfare states have become an important institution in Western democracies with which both politicians and citizens have some dealings during their lives. Bearing on these social, political and economic changes, and with the theoretical framework for analysing support for the welfare state, the thesis goes on to outline the methodological approach taken.

**What welfare state?**

The following will briefly introduce what a welfare state may be understood to be, before discussing attitudes more generally. The concept of the welfare state is conceptualised in a variety of ways and there is a certain level of disagreement as to its definition. As with all concepts, we must however, move beyond a Humpty-Dumpty definition assuming that ‘When I use a word, it means just what I choose it to mean, neither more nor less’ towards a definition with explanatory meaning, providing fruitful analyses of social phenomena. As Powell & Hewitt (2008) argue it is “Impossible to define precisely and equally impossible to do without” (Powell & Hewitt, 2008, p.6). Welfare states and their foundations may be seen as important for a range of reasons, and Baldwin (1990) argues for the importance of understanding welfare states in times of change as “On-going disputes among groups for redistributive advantage, contests over solidarity, force a constant renegotiation of the social contract” (Baldwin, 1990, p.1).

This project takes a pragmatic view in terms of its understanding of the concept as Jones Finer (1999) and aim to use a definition “which can encompass the variety of states which have conventionally been classed as ‘welfare states; and which might also in principle serve as a benchmark for establishing when a welfare state has ceased to be, and/or for the admission of others to this status” (Jones Finer, 1999, p.16). In addition as welfare states change concepts themselves may have changed and be in constant flux, this further underlines the need for a pragmatic approach rather than a concise definition. As a result, we let authors self-define the concept. Thus, studies focussing on a wider range of policy areas than health services, education, housing, social security and personal service will be included. O’Brien and Penna’s (1999) definition and Jones Finer (1999) approach that outlines hallmarks of welfare statism, civil rights, political rights, social rights, approved social obligations and rich capitalist free market (Jones Finer, 1999, p.17) are both understandings that serve as the fundament for this project’s understanding of the welfare state. However, it is assumed that most definition will include some aspects of the following definition of a welfare state; “A welfare state is a state in which organized power is deliberatively used in an effort to modify the play of market forces in at least three directions- first, by guaranteeing individuals and families a minimum income irrespective of the market values of their work or their property; second, by narrowing the extent of insecurity by enabling individuals and families to meet certain ‘social contingencies’ ..and third, by ensuring that all citizens without distinction of status or class are offered the best standards available in relation to a certain agreed range of social services” (Briggs, 2000, p. 18).

As the aim here is not to study the welfare state itself, no extensive discussion of its definition will be included. On the other hand, as differences between institutional structures of welfare states in different countries is a commonly used explanation of variations in support for welfare state this will be discussed later in the chapter. Thus, it is expected that studies emphasise some or more of the elements of a welfare state described above. The inclusive nature of this project thus means that we are able to include as many as possible aspects related to changes occurring, as well as providing a more comprehensive account of what we know about attitudes to welfare. As a result when selecting studies for this project the reviewer’s judgement will be of importance due to the lack of a concise definition, on the other hand it also makes it less of a prisoner to the reviewer’s judgement due to the inclusive nature of this approach with less danger of studies being excluded when they shouldn’t be. Any judgement involved and also all decision made to extend or limit definitions of the word will however be documented.

**What attitudes?**

The following will briefly discuss the definition and understanding of what attitudes are and why they are important, and will be followed by a discussion of theories and approaches to support for the welfare state. The argument of the thesis is that we need to differentiate better between values, attitudes, perceptions and beliefs in the area. Often it is found that a study claims to study attitudes but measures and studies values. Here it is seen as important for a study that is conducting a review of support for the welfare state to take the opportunity to delve and explore how the concept is studied and any issues related to it. This is particularly important as some would question the impact of attitudes, and values in that they do not predict behaviour, and furthermore to understand what we are studying and how this may impact our findings. It is thus argued that it is possible to differentiate between the concepts.

Historically the term attitude “referred to a person’s bodily position or posture. In social science, however, the term has come to mean a posture of the mind’ rather than of the body” (Oskamp, 1991, p.6). From this it is clear that the concept contains an aspect of readiness for response, a preparation for behaviour and as Oskamp (1991) argues it also has an evaluative aspect, something that has been increasingly stressed in recent years. Thus, “...an attitude is more generally seen as a disposition to respond in a favourable or unfavourable way to given objects” (Oskamp, 1991, p. 9). The characteristics and properties of attitudes are rarely discussed at much length in the literature on attitudes to welfare, as far as this researcher knows. However, there is a vast literature seeking to define and understand attitudes and their relation to beliefs, values and perceptions in other areas. Moreover, it is argued that attitudes, perceptions, beliefs, stereotypes and values all form part of what is studied by work done in the area of support for the welfare state and the project explores how this impacts findings.

In his book on attitudes, Oskamp (1991) includes a discussion of the differences between the different concepts. Thus he defines beliefs as cognitive ideas about the attitude object, attitudes as affective reactions and opinions towards an object whilst “values may be seen to represent important life- goals or societal conditions (Oskamp, 1995, p. 9). Here, I am in agreement with Oskamp (1991) about the divide between the meaning and function of these three concepts, and argue throughout the thesis that the area need to further critically discuss what we measure and what impact this may have on our findings. In line with this approach, Svallfors (2006) argues, “’Attitudes’ are here understood as normative beliefs and opinions about particular social objects. They differ from ‘values’ in that they are tied to specific existing objects. They also differ from ‘positive’ beliefs, which are beliefs of the actual state of affairs” (Svallfors, 2006, p. 18). Based on this approach to values, we see that values have a normative aspect to it where they, as attitudes, entail normative judgement of society. Furthermore, values are seen as underlying attitudes, as is beliefs. In their study of the scope of government Borre and Scarborough (1995) highlights that there is a difference between these concepts and show how they relate to each other, “Attitudes may be underpinned by a series of cognitive beliefs, which may or may not be accurate or realistic. For example, support for strong law and order policies may stem from the belief that severe punishments reduce crime rates” (Borre & Scarborough, 1995, p. 13). As Borre and Scarborough (1995) claims “Both **attitudes** and **cognitive beliefs** have a critical role in the interaction between state and society” (Ibid). Furthermore, there are strong links between the normative and cognitive, and the two need to be conceptualised and studied as normative beliefs may be informed by cognitive beliefs. In an effort to define values Dalton and Klingeman (2007) defines them as “deeply rooted motivations or orientations guiding or explaining certain attitudes, norms and opinions” (Dalton & Klingeman, 2007, p. 309). From these views it is evident that the concepts may be overlapping and in this study a pragmatic approach is chosen where studies will be included if they focus on individual’s attitudes, values, beliefs, opinions, stereotypes and perceptions, as long as they are related to parts of or an operationalized representation of the welfare state.

As a result, as is argued in this thesis, the different concepts, beliefs, norms, values, perceptions and attitudes are very closely related and in fact attitudes build on beliefs about society. These should be taken into consideration, and we should in the area study how they relate to each other and impact our findings. Thus, the findings chapters will have a keen eye to what aspects are measured in the different studies. Furthermore, as will become clear in the next section, this thesis argues that it is important to understand the process of social cognition of which all of these form part. Support for the welfare state can be placed within the area of attitude studies and argued above it can be explained by and measured at multiple levels (e.g. macro and micro) as well as by interrelated concepts. This rests on the assumption “that public attitudes toward the welfare state are not only individual-level phenomena, but also collective phenomena. Typically, collective attitudes are viewed as a product of institutional characteristics of welfare policies in different countries” (Blekesaune & Quadagno, 2003, p. 415).

A second aspect when analysing attitudes is the stability and strength of attitudes as we often are interested in knowing not only the attitudes at one point in time but in how these may change under different conditions or over time. A question to that is addressed here is whether models that explain attitudes without attending situational factors may be seen as limited, as well as what we know about changes over time. Both of these aspects may help us understand which attitudes change, which can teach us something about stability and strength. The following will discuss how attitudes and its related concepts have been approached when studying support for welfare states.

Another key question for this study is: why are attitudes important? Oskamp (1991) argues that there are several reasons inherent in the concept attitude that makes it important to study. First of all, an attitude is a short hand term where “a single attitude (e.g. love for one’s family) can summarize many different behaviours (spending time with them, kissing them, comforting them etc.)” (Oskamp, 1991, p. 3). Secondly, some argue that attitudes may explain a person’s behaviour. Thirdly, it can also help “explain the consistency of a person’s behaviour, since a single [attitude] may underlie many different actions” (Oskamp, 1991, p.3). However, as Hechter (1992), Doll and Ajzen (1992) question this assumption and show that rather than a deterministic relation between attitudes and behaviour there is an indirect effect on behaviour. In addition to attitudes impacting behaviour it has been shown that beliefs, values and perceptions play a role in influencing behaviour in addition to pure attitudes.

However, attitudes can be seen as important in their own right as they “reflect the way you perceive the world around you and they are worth studying for their own sake” (Oskamp, 1991, p.3). In addition attitudes can be argued to be a neutral and acceptable concept, as well as being an interdisciplinary concept allowing this study to explore different discipline’s explanations of a variety of attitudes and phenomena. In the following section I will first of all introduce some ways in which opinion polls and attitude research is used, and seen as important in literature and by politicians, before I present one approach, levels of generality, to improve the conceptualisation of attitudes that will be applied and tested in the analysis. Overall, operationalization is a focus in this study, enabled by the SR tools, and thus I explore how attitudes are measured, operationalized and discussed in the area

**Approaches to support for welfare states**

*“The essence of politics is the transformation of preferences through public and rational discussion”*

(Elster, Sour Grapes http://home.sandiego.edu/~baber/gender/Elster.pdf, p.237)

Before discussing how support for the welfare state is typically analysed and explained, I will briefly discuss the role of polls and surveys, not only in academia, but the wider society. This discussion is tied to the importance given to attitudes both politically, in the media and by scholars. Importantly we need to be aware of how data is used, related to a discussion of the value of research, but also how this relates to democratic theories of the role of politicians. Thus, before outlining the theoretical framework to be used for analysis, I give place to the politics of polling.

The political importance of polling and surveys

The use of polls and survey material has increased with the development of the technology enabling them to be carried out and communicated at greater speed and ease than earlier. The results of these may be used both by politicians as well as media and scholars, all of who use these with different aims. Media may use results from polls to criticise politicians (<http://www.telegraph.co.uk/news/politics/10096817/On-immigration-welfare-and-crime-cynical-Britain-just-does-not-believe-politicians-anymore.html>) whilst politicians can use them to argue that they have support for their policies (<http://www.thesun.co.uk/sol/homepage/news/politics/4876917/Brits-say-benfits-are-too-generous.html>). Some argue “polls are the ‘long sought’ key to ‘Government *by* the people’” (Streb & Genovese, 2004, p.4). However, much criticism has been made in the way polls are constructed, what is measured and how questions are asked. On the other hand, and more critically polls may be seen as helping to “transform autonomous public opinions into much more manageable “mass opinions” that could be created and shaped to suit particular interests” (Splichal, 1999, p.9). The increased use of this information does underline the importance of this project, as it is important to have critical discussions of what trends are occurring, what may explain these trends as well as how one may best go about studying attitudes.

In political science, the use of polls as linked to a type of democracy as “Some believe that the role of an electoral official is to act as a ‘delegate’ to follow the will of the people when creating that policy” (Streb & Genovese, 2004, p.4). This is opposed to a Burkean view of representation, trustee theory, where “politicians are not expected to follow public sentiment, but to act as ‘trustees’” (Streb & Genovese, 2004, p.4). This view argues that politicians have knowledge on an issue that citizens do not. However, an issue is that “..the public does not necessarily agree with the elites” (Streb & Genovese, 2004, p.4). However, one sees the ideal form of political representation we have seen increased use of polls, as well as surveys such as the British Social Attitude Survey in the media. Some have argued that this should not play a role in decision making as “…many argue that politicians should pay little attention to polls, because they believe that polls do not provide any meaningful information about preferences” (Streb & Genovese, 2004, p.4).

The latter is related both to how one may want politicians to operate, but is also related to problems with surveys and polls specifically. Amongst these, which also applies to more scholarly attitude surveys, is the problem of measuring non-attitudes; “when people have no genuine opinion on an issue, yet respond to a survey question as if they do, so as not to look uneducated” (Streb & Genovese, 2004, p.5). This will be discussed in the findings chapters. Furthermore, there are questions around the validity of polls and surveys, as they may be “easily manipulated through question wording or the order questions are asked (Streb & Genovese, 2004, p.6). Some also warn that the information may be misused;

*“In the hands of a modern day Machiavelli they are indeed a threat to democracy, especially where there are politicians in positions of power who are without scruple in the belief that the end justifies the mean, and without constitutional safeguards to protect minority rights” (Worcester, 2013, p.8).*

For this project it is important to be aware of discussions around how polls influence people’s views. Furthermore, agenda setting is an important aspect of political power, thus we should be critical and ask; who defines the important and dominant questions? As a result we are not only looking at institutional feedback effect and people’s effect through voting and behaviour, but need to be aware that views may be impacted by information and discourses in the media and politics more generally. However, there is a lack of consensus in terms of exactly how and what aspects of citizen’s opinion polls may impact. Sonck and Loosveldt (2010) find that provision of poll information influenced collective opinions (perceptions of collective opinions rather than personal opinion) and not individual opinion, and that “movements in these perceptions of collective opinion were in the direction that could be expected based on the poll information provided” (Sonck & Loosveldt, 2010, p. 249). They also find that the changes in collective opinion still could be observed three months later. In other words some attitudes may be impacted whilst others are not, and changes may or may not be sustained over time. On the other hand some scholars have studied how political knowledge of citizens may impact to what extent and in what way information influence citizens’ attitudes; “The political knowledge possessed by the informed voters better enables them to cut to the core of the flow of the political news” (Hansen, 2009, p.526). The above underlines the importance of critically assessing what we know about citizens attitudes, especially as we need to have more critical discussion and use of the results presented in these polls and surveys. The following will discuss theoretical approaches to support for the welfare state.

A framework to study support for the welfare state

This study builds on a longer tradition of studies of welfare state legitimacy. Roller (1999) traces discussions and concerns about support and legitimacy of welfare states back to legitimation crisis discussions in the 70s amongst leftist thinkers such as Habermas. Their concerns were raised during the oil crisis of the 1970s and “the leftist critique [of legitimacy crisis] was complemented by criticism from the right” (Kautto et al., 1999, p. 6). Amongst the arguments from the right was the ‘overload’ thesis, claiming that “government functions kept on expanding, while their capacity to fulfil promises became weaker” (ibid). Reviewing historical changes from that time up until the early 1990s Borre and Scarborough (1995) argue that “as states and economies developed, pressure grew for those in power to accept responsibility for the well-being of their populations, in the form of social security provision, education and training, housing, or cultural activities” (Borre & Scarborough, 1995, p. 2). They found that there was no crisis (predicted by scholars through amongst others the ‘overload’ hypotheses, democratic crisis etc.) in support for government. The question now becomes what has happened with support for the welfare state since the mid-90s in a context of established welfare states, low/no economic growth and the welfare pressures, which will be discussed later. I will not enter into a historical discussion of concerns about the legitimacy of the welfare state, however, it is interesting to note that worries about the sustainability of support in a changing world go back in time yet welfare states and support for welfare states seem to prevail. Moreover, discussions and concerns are highly related to societal changes and crises.

In the following different explanations of support for the welfare states are discussed, to provide an overview of the main theories and explanations used to study support for the welfare state. These will form the framework that the analysis and synthesis will make use of, adding to, strengthening and criticise the different approaches. The chapter will start with outlining different measures and conceptualisations of support for the welfare state, and will go on to discussing theories and explanation of these.

Overall, the thesis argues that the on-going changes in society may impact citizen’s support for the welfare state, and thus welfare state legitimacy. Here, as already stated, an attitude, which is what support often is measured as, is understood as reactions to and beliefs towards an object, in this case the welfare state and its parts (Davidov et al., 2008, p. 584). It is important to recognise that values are often part of studies in studies in the area, and that studies sometimes label these as attitudes, thus, the framework includes concepts covering both. Furthermore, a tool that enables a critical discussion of this is needed in the synthesis due to tendencies to conflate and mix the concepts. The crucial importance of support for the welfare state in light of welfare pressures, is underlined in many studies, in particular as there is an assumed relation between institutions and individual’s values and attitudes; “the nation state became one of the most important organizational entities for social solidarity, because it provided the fundamentals of a political identity and social morals, which underpin redistributive social security systems” (Mau & Burkhardt, 2009. p. 214). Thus, to understand how citizen’s attitudes change, if at all, is crucial to understand how it may impact and be impacted by welfare arrangements and in the end what the consequences may be for the form and sustainability of welfare states. Support is important to maintain welfare states as welfare states is built on sentiments of mutual responsibilities between citizens and the state (i.e. a citizen transfers money to the state based on the belief that she will receive the benefits she needs when she needs them) and a decrease in the cohesion and social ties may affect this balance.

## Table 2.1 Overview of factors influencing support for the welfare state

|  |  |  |
| --- | --- | --- |
| **Framework for attitudes** | **Factors influencing attitudes** | |
| Levels of generality | Structuring macro-level factors | Individual level factors |
| * Universal values (Haller, 2002) * Basic Human values (Schwartz, 1992) * ‘Societal’ values or value orientations (Haller, 2002) * ‘Situational’ value orientations and norms, guidelines, and prescriptions (Haller, 2002) | * Welfare regimes * Political and democratic institutions * Community * Demographic characteristics (e.g. ageing population) * Specific policies * Socio-ec. characteristics (e.g. GDP) * Class & stratification * Family structures | * Objective characteristics (structural e.g. gender, Van Oorschot, 2010) * Subjective characteristics (ideational, e.g. political placement, Van Oorschot, 2010) |

Table 2.1 presents an overview of different factors often highlighted when studying welfare attitudes and support for the welfare state. It also represents a framework that can be used to analyse and position studies in the area relative to each other. The first column outlines different levels one can place attitudes such as support for the welfare state on, whilst column 2 and 3 outlines factors and variables often use to explain support for the welfare state. Thus, in terms of explanations different schools of thought will analyse and make use of different factors to explain variation in support for the welfare state. One approach may emphasise how objective characteristics at individual level influences through self-interested individuals, whilst another may emphasise the impact of welfare state regime types as these may be seen as having an effect on individuals through norms and socialisation. One area that will not be covered here is the impact of information on individual, which includes studies on perception bias and studies that analyse how framing and information influences different individuals different (see for example Jerit & Barabas, 2010). Here, I will first discuss the first column and the operationalizations of support for the welfare state, and go on to discuss the different explanatory approaches. As will be seen, the influences of these factors, both macro and micro factors, are typically explained by self-interest, socialisation or personal experience related to the characteristics at individual or macro-levels (Van Oorschot, 2010).

The thesis will explore whether or not Haller’s (2002) framework focussing on levels of generality may help increase our understanding to enable a research synthesis that can help provide a critical discussion of whether or not studies are making use of and measuring values or attitudes. In table 1 the first column refers to different levels of values based on Haller (2002) and Davidov et al. (2008), and serves to position studies. Haller (2002) argues that values should be placed on different levels to be understood and analysed correctly, emphasising the importance of a better theorisation of attitudes, a position shared by this project. The three different levels, ‘Universal values’, ‘Societal’ values and ‘Situational’ value orientations (Haller, 2002) operate at different levels of generality, abstractness and change more/less easily. Firstly, “*universal values* are those very basic human values that are known in any literate civilization…We can think here of values like equality and freedom, justice and respect” (Haller, 2002, p. 143). ‘*Societal values or value orientations’* are more concrete values tied to specific social contexts and populations e.g. equality which value has changed “both in content (equality of opportunity, equality of treatment of men, etc.) and in coverage (equality between estates, between men and women…)” (ibid). The latter can be used when analysing different countries and welfare state regimes, and is distinguished by measures emphasising underlying values that are tied to social context such as views on inequality, a measure used in support for the welfare state literature. To distinguish this in the synthesis it is important to emphasise that these are measures that are more abstract than attitudes and thus related to values. In other words they are distinguished from ‘*Situational value orientations and norms, guidelines, and prescriptions’* include attitudes towards specific objects, behaviours and persons such as welfare claimants and individual preferences (ibid). Furthermore, as we will see in the findings chapters Haller (2002) argues that there is a sliding transition from societal to situational levels values, which means that they sometimes may be intertwined or mixed. I will still make use of the framework, as it represents an additional tool that enables a more critical discussion of what we are measuring, and with the aim to improve our understanding of the cognitive, normative and affective processes involved in individuals’ values, beliefs and attitudes.

Again we see a conceptualisation where time is important, ‘Societal’ values change slower and are deeply ingrained in institutions and countries whilst ‘Situational’ values may change quicker. Important here is the difference between values and attitudes. Importantly then, there may be a difference between attitudes and values, as attitudes can be placed at a level called situational value orientation (Haller, 2002), and are seen to refer to the “evaluative sum of several beliefs to a certain object” (Davidov et al., 2008, p.584) whilst values can be seen as “the belief that some end-state or mode of conduct is preferable over another end-state mode of conduct” (ibid). This is important as studies may claim to focus on attitudes whilst really researching values, and in this thesis it is argued that it is important to have a higher awareness of what level of generality we are studying as findings may vary depending on what we study. Thus, a clearer and critical discussion of concepts and operationalization of values and attitudes may help us improve our understanding of “the relation between those values and the social circumstances within which they are embedded” (Haller, 2002, p.143). Basic human values, also sometimes used in the area, often refer to 10 basic human values created by Schwartz (1992) distinguished by motivational goals, e.g. conformity, hedonism and universalism (Davidov et al., 2008, p. 584).

Related to the levels of generality and the emphasis in this thesis on operationalizations and understanding of what attitudes represent. Roller (1995) divides explanations of attitudes and values towards the welfare state into individuals’ interests- and/or value orientation. To her, interest orientation is an instrumental orientation, referring to the attainment of material needs for oneself and is short term, whilst a value orientation “refers to long-term predispositions of a universal moral character which have been acquired through socialization” (Roller, 1995. p. 169). Based on the latter we can see that a time dimension is introduced where values are seen as representing something more durable and longer lasting. An issue here is that value orientations are used to explain attitudes underlining the importance of clarity when operationalizing concepts so that they measure different phenomena to avoid tautologies. An example of the influence a characteristic may have is that welfare state arrangements in particular countries may have a socializing functions on citizens (e.g. Larsen, 2006) and thus serve as a filter when we are to understand the influence of changes such as increased immigration on citizens’ support for the welfare state (Finseraas, 2008). Further exemplifying the influence of these factors, on the individual level and building on the ‘self-interest‘ explanation, is the finding that “people with lower socio-economic status, unemployed persons, less educated persons and people with a more rightist, conservative ideology have more negative views than others on immigrants’ deservingness of social rights” (Van Oorschot & Uunk, 2007, p.65).

Scholars focussing on values and discourse when analysing welfare arrangements focus on what we here see defined as societal type values. Here, discourse is used according to Schmidt (2008), and refers to what is said, where, when, how, why and to whom (Schmidt, 2008, p. 305). According to Peillon (1996) and Schmidt (2002) values and attitudes are made more evident in moments of crises, thus this is in my opinion a timely project. As Schmidt (2002) argues “By focusing on moments of crisis or transition when values are generally made explicit in public debates as opposed to continuing as unquestioned background assumptions embedded in institutional practice”(Schmidt, 2002 p. 230). Furthermore, values are important as ”value-system (underlying legitimation) of society as a whole and the principles underlying welfare” (Peillon, 1996, p. 177). The way values and discourses are shaped differs by country, and is impacted by institutional contexts according to Schmidt (2002);

*“Discourses differ across countries not only in the range of values to which they may appeal but also in how they are constructed and where they are focused. This is because different institutional contexts tend to frame the discursive process, determining who is involved in the initial elaboration of the policy program and discourse and toward whom the discourse is directed.” (Schmidt, 2002, p.231)*

Measuring support for the welfare state

As seen, attitudes can be operationalized and measured at different levels and may represent and explain different cognitive, emotional and normative aspects of a person’s way of thinking, feeling and behaving. The importance of a high level of awareness and attention given to operationalization will be emphasised further in the findings chapter of the thesis. The following will outline and illustrate some measurements and operationalizations used in the literature to study support for the welfare state. In the literature support for the welfare state is operationalized in a variety of ways and one can argue that some variables might be a better measure of support than others. This will be discussed in the quality appraisal and findings chapters.

Before going into some examples of how support for the welfare state it is useful to add another aspect of measuring support to the framework. This also relates to the levels of generality presented earlier.To measure support for governments, Easton’s (1975) divided support into specific and diffuse support. Specific support is related to the evaluation of perceived outcomes whilst support for redistribution is an example of diffuse support as it refers to support for the institutions and principles of the institutions, thus trust and legitimacy are crucial elements of this type of support. In other words diffuse measures of support can be related to what can be placed on a societal level of generality, whereas a diffuse type of support is more concrete attitudes towards an object. This is important to have in mind, as Easton (1975) argues that whilst specific support may decline this does not necessitate a decline in the diffuse support as one may be unhappy with politicians’ work but not necessarily the institutional framework, e.g. welfare states. However, the two are clearly related and may influence each other, and are important to have in mind when analysing support for the welfare state.

In the following section some measurements and approaches to operationalizing support for the welfare state is explored, and I will show how the operationalization and measurements often go across and mixes levels of generality. To be able to analyse what level the measurements are on in the findings chapter is seen as important to understand their relationship with the concept they are measuring, but also to problematize the approaches made in the area. Thus, the level of generality is one framework that can be used to provide distinguishable patterns of measurements and concepts.

In terms of values that are closer to a societal level of generality, solidarity could be defined as such, and is an aspect that often is studied in the area. Hooker (2009) defines political solidarity as “the reciprocal relations of trust and obligation established between members of a political community that are necessary in order for long-term egalitarian political projects to flourish. Because democratic polities require consent, citizens must develop solidarity” (Hooker, 2009, p. 3). This shows how solidarity may be operationalized and measured at a societal level. On the other hand, it may also be said to be linked to support, albeit indirectly, through a situational level of generality measure as it may be defined as concern for others and thus support for certain groups’ wellbeing. This is then assumed to impact the support for specific welfare programmes or the welfare state as a whole. Van Oorschot (2000) is an example of the latter, as he studies informal solidarity through a situational value, concern for those in need, which is a common measures in studies within the deservingness school of thought. For this study deservingness needs to be related to support for the welfare state to be included in this study. Van Oorschot (2000) as well as Larsen (2006, 2008) are amongst those that focus on deservingness and deservingness criteria which as Van Oorschot (2000) claims can be understood as the “public’s answer to ‘who should get what, and why?” (Van Oorschot, 2000, p. 34). Thus, it seems that it is important to critically discuss how solidarity is is operationalized. This is because, as we have seen, some operationalize and measure it as concern for specific groups such as Van Oorschot and Uunk (2007), who look at informal solidarity towards immigrants measured as concern about the living conditions of needy group (Van Oorschot & Uunk, 2007, p.218).

On the other hand we have authors such as Arts and Gelissen (2001) writing about whether or not solidarity and social justice are related to the type of welfare regime they live in (Arts & Gelissen, 2001, p.283). In other words they study it as a societal level value. They agree with this study in that there are many problems and discussions around the definition of the concept but end up using the following definition, “Solidarity takes shape either vertically: The ‘strong’ help the ‘weak’ by redistributing benefits and burdens or horizontally: the ‘strong’ and the ‘weak’ contribute to the common weal by risk-sharing” (Arts & Gelissen, 2001, p. 285). Their definition of the term is based on Van Oorschot and Komter’s work that concludes; “the distinctive features of societal solidarity are communal interests (shared utility) and feelings (shared identity) (Arts & Gelissen, 2001, p. 285). In the synthesis chapter a critical discussion of these operationalization issues is included.

Support for the welfare state may also be differentiating betweensupport for certain goals and values of the welfare state (e.g. Linos and West, 2003). Thus, again separating between the diffuse and specific, and levels of generality, Roller (1995) representing an approach focusing on the goals of welfare states, analyses support for the welfare state by use of two main objectives of welfare states; achieving socio-economic equality and socio-economic security. She measures socio-economic equality as equality of opportunity and equality of result, whilst socio-economic security is measured as attitudes towards specific programmes pensions, healthcare services and unemployment benefit. Again, we see that the measurements can be related to the societal versus the situational.

As Roller (1995), many authors use measures of equality, a societal level value, (Taylor-Gooby, 2004; Andersen and Singer 2008; Andreβ and Heien, 2001) as a proxy for welfare states and their policies. Others focus on the security and needs dimension of welfare states as Pettersen (1995). These focuses on objectives, and situational values, of the welfare state related to achieving the security and meet the needs of certain groups in certain situations. Importantly and despite the fact that the focus on objectives of the welfare states is described as an overall group there might be different traditions within each of these approaches. Moreover, support can be measured as support for basic income, understood as a proxy for a type of welfare arrangement, as well as government responsibilities (e.g. Bay & West Pedersen, 2006). Furthermore, it can be studied as support for a specific area. One area related to this is the area of pensions and the needs of a greying population. Esser (2005) addresses concerns related to this in her study that focuses on perceptions and attitudes to retirement and work orientations. Support may also be operationalized through relating it to the range and degree of government responsibility (Roller, 1995) where “range regards the issue of whether government should or should not take up welfare responsibilities and in what range of policy areas. Degree concerns the issue of how much government should spend on welfare provision” (Van Oorschot, 2010). Here, a wide approach is taken to support thus encompassing both specific and diffuse support for all aspects of the welfare state.

Another example of how situational and societal level values sometimes are intertwined and not clearly differentiated is found in Halvorsen (2002). He studies support for the welfare state by focusing on the social legitimacy of the welfare state. In his study he operationalizes welfare state legitimacy as attitudes to abuse of welfare benefits (Halvorsen, 2002, p.1). Legitimacy can be defined as “principles or values according to which an activity or an institution is successfully justified” (Peillon, 1996, p. 177) and thus legitimacy is closely linked to support for the welfare state as without it one would not expect there to be support. More specifically to the area of welfare states “Welfare legitimacy can be measured by popular support, which in turn has its basis for support in values and/or self-interest” (Peillon, 1996, p.177). It is clear that the two are closely linked and both will be covered by this study. The importance of the area of support for the welfare state is highlighted by Peillon (1996) as “any weakening of support and legitimacy for the welfare state would significantly add to the difficulties of social reproduction (Peillon, 1996, p. 176).

Arguments supporting a multidimensional approach to studying support for the welfare state can be found in Van Oorschot (2010).In his work, Van Oorschot (2010) underlines that due to the multi-dimensionality of the welfare state multiple indicators beyond the role of government need to be assessed to capture welfare state legitimacy i.e. factors such as it doesn’t take into consideration ways in “which benefits and services are financed, how and by whom policies are implemented, how effective the outcomes of welfare policies are and what their economic, social and moral consequences are” (Van Oorschot, 2010, p.20). His argument is that studies need to analyse more than one legitimacy indicator to capture welfare state legitimacy.

Furthermore, welfare states are often related to the concept, social justice, which can be argued to be a more pure societal level value. This concept is linked to other concepts often dealt with such as equality, poverty and redistribution and Arts & Gelissen (2001) emphasise three overarching principles of distributive justice “(1) equity; (2) equality; (3) need. As both solidarity and social justice are broad concepts with a wide usage, I here consider studies that analyses support for and attitudes to solidarity and social justice in relation to the welfare state. Redistribution is linked to equality in so far that it deals with values judgements of how goods should be distributed in society. This might be interpreted as equality of outcome in so far as it is often measured as Svallfors (1997) does, attitudes to whether government should ‘reduce the differences between people with high incomes and those with low incomes, ‘provide a job for everyone who wants one’ and provide everyone with a guaranteed basic income’ (Svallfors, 1997, p. 288). As can be seen from this, redistribution and equality may be overlapping and one should take great care when analysing studies in terms of how they have operationalized the term. A critical discussion of the operationalization of this concept is included in chapter 6.

Thus, as this brief overview shows, support for the welfare state can be measured both as support for certain programmes, the welfare state overall, proxies for the welfare state such as basic income as well as values and responsibilities the public might want the welfare state to represent. In other words concepts may be measured at different levels of generality at the same time or they may be clearly distinguishable. A critical discussion of these measurements and their impact on findings is included in the findings chapters. As will be seen in the findings chapters, authors operationalize their measures of the welfare states in a range of ways. The following will discuss some of the explanations used to explain citizens’ support for the welfare state. As can be seen by the discussion these can be placed on different levels of generality (e.g. deservingness as situational and redistribution as societal), and we may thus expect them to vary and measure slightly different aspects of people’s attitudes. Importantly one should also have in mind to what extent we are measuring non-attitudes, in the sense that we need to ask ourselves whether citizens have opinions on this, or whether they relate the welfare state to the concepts use to measure it.

Based on the above discussion the project takes an inclusive approach, and throughout the process of the review support is seen to be measured in the various ways (and will be included when related to support for the welfare state) as seen in the list below. However, when other attitudes not covered in this list but which is related to attitudes measuring citizens support for the welfare states studies are included. The measurements are listed from societal (the top of the list) to situational to show the sliding transition from one level to the other, which as we have seen may not always clear-cut.

* Support for equality, and measurements related to inequality, equality and egalitarianism
* Support for redistribution
* Support for spending on needy/poor- solidarity?
* Range and degree as defined by Roller (1995) when analysing welfare state legitimacy. Here “range regards the issue of whether government should or should not take up welfare responsibilities and in what range of policy areas. Degree concerns the issue of how much government should spend on welfare provision” (Van Oorschot, 2010).
* Support for spending on the welfare state in general and specific programs (including basic income) taken to represent the welfare state, meaning both specific policy areas and universal versus means-tested programmes

Explaining support for the welfare state

The following will expand on and explore some of the explanations related to factors listed in column 2 and 3 in Table 2.1.I will not discuss each of these factors, but rather illustrate some common approaches in the area using some of the factors as examples. As already stated these factors are typically used to represent factors that influence individuals’ attitudes through mechanisms such as self-interest, socialisation, and personal experience. Individuals are furthermore seen as being placed in a specific spatial and temporal context, thus different types of institutions as well as occurrences in time is said to either affect individuals self-interest and/or socialise them.

Kautto et al. (1999, p. 15) argue that one needs to take into account that there are several processes occurring at the same time. Economy, politics and social structures influence legitimacy but may also be impacted by legitimacy. Welfare outcomes, past and current will also influence both measures and legitimacy. Thus it is important also to relate individuals’ attitudes to the both the spatial and the temporal reality they live in. In their book Kautto et al. (1999) underline the need to differentiate between short and long term trends when we analyse changes over time. Short-term changes may include economic crisis effects, which become particularly important when analysing other studies, as in this project that might not look at changes over time. Thus there is a need to be careful when interpreting, as we might understand something as a long-term trend that is really a short-term fluctuation. This is confirmed by findings in Kautto el al (1999) who find temporal changes, decreased support in Denmark and Finland, but an underlying stability over time as there is no long term decline in general support “Variations in approval for the welfare state also relate to economic and political situations which are often historically constituted” (Kautto et al., 1999, p.246)

When discussing theories emphasizing self-interest it is important to underline that self-interest itself can be shaped by structural factors and individuals when studied as acting out of self-interest are not always analysed as independent rational actors. Self-interest can be seen as rational self-interest in individuals as discussed previously, but in theories about support for the welfare state related to pressures much emphasis is put on structural factors that lie behind and shape individuals’ self-interest. Based on Esping-Andersen’s model one can expect that the following structural conditions might shape individuals self-interest: “Scandinavian countries are expected to place women working mainly in the public sector and men employed in the private sector in opposing camps with regard to welfare policies. In the *conservative* regime, exemplified by Germany ‘a variant of the ‘insider-outsider’ phenomenon seems likely to evolve...a double-sided conflict where the classes are defined in terms of being job-holders or outsiders (from E-A, 1990, 227-228)” (Linos and West, 2003, p. 394). Thus, building on self-interest explanations one could expect women in Scandinavian countries to be more supportive of welfare states.

Other possible structural cleavages highlighted by these authors are; “workers with specific skills are likely to be especially supportive of additional social protection” (Linos & West, 2003, p. 395). Path-dependency, particularly in established welfare states, can also be approached from a self-interest point of view in so far that there is policy feedback from groups benefitting in one way or another from the welfare state thus representing resistance against big changes. In addition, expansion of means-tested systems throughout Europe “opens up for structural division between the interest of those for whom entitlement is based simply on need and others“(Taylor-Gooby, 2001, p. 8).

A range of variables are often included in studies in the area, amongst the most commonly included are *age, education, gender, class, faith, party identification*. Some of these have been used to explain individuals as self-interested actors. An example of self- interest and its presentation in a variable such as age is the assumption that “young adults should favour benefits for children” (Blekesaune & Quadagno, 2003, p. 416). For this study it is important to analyse age critically when seeking to understand the attitudes of specific groups (such as the elderly) towards the welfare state as diversity within an age group may mean that age needs to be problematized when included in models.

A focus on *self-interest and rational actors* can be found particularly within the discipline of economy**.** Economic interest, as highlighted by (Johnston et al., 2010), is intertwined with self-interest in so far that it focus on the interest of an individual “rich voters have an incentive to resist redistribution; poorer voters have an incentive to support it” (Johnston et al., 2010, p.354). According to Blekesaune (2007, p. 394) “Empirical studies have supported the self-interest argument”. Self-interest can also include class interest in as much as classes’ attitudes may be influenced by their perceived interest. Mau (2003) identifies the following theories which have their main emphasis on self-interest; “beneficial involvement’, ‘rising demands and ungovernability’, legitimation crisis: value for meaning’, ‘the welfare backlash and rational opposition’, ‘entrenched interests’ and ‘varieties of capitalism’ and lastly ‘policy reforms: designing institutions for knaves” (Mau, 2003, pp. 6-18). A broader sense of rational actors is related to a more dynamic approach as discussed earlier and can be defined as “the individual is assumed to be a rational actors, but what s/he sees as rational action is itself socially constituted” (Esser, 2005, p.15).

The above reflects the view that different institutional settings will influence how what self-interest may mean in different institutional settings. Much has been written about whether or not institutions matter for citizens’ support for the welfare state, and those using these types of explanations may be seen to represent a separate school of thought and approach to studying support for the welfare state (e.g. Andres & Heien, 2001). Another way of analysing institutional settings is as impacting and being representations of certain value set in society as argued in the cultural values approach exemplified in Schmidt (2002) and Pfau-Effinger’s (2005) work discussed earlier. Thus, institutions serve as a socialising agent, as well as representing values dominant in a particular context.

Moving beyond self-interest explanations, Linos and West (2003) claims, as Lindbeck (1997) that “norms of reciprocity and altruism are at least as dominant as self-interest, in governing human interactions” (Linos & West, 2003, p.395). Supporting the argument that we need further critical discussion of the operationalization of attitudes and values in this area. Peillon (1996) supports this reasoning, and finds evidence that “support [for welfare programmes] is based on values and beliefs, and not predominantly on self-interest” (Peillon, 1996, p. 189). Variables such as education is often seen as a variable that is explained by socialisation as they may be supportive of welfare policies that they do not necessarily need themselves, as they for example are seen as having a wider horizon and are more accepting of other cultures and behaviours (van Oorschot & Uunk, 2007b: 222). This was also confirmed by Van Oorschot (2010) when he analysed welfare state consequences and legitimacy. In other words socialisation occurs through an internalisation of social norms where social norms become internalized in an “individual’s own value system” (Lindbeck, 1997, p. 370).

Socialisation approaches emphasise the understanding of how “normative orientations, controlled by culture and socialization, were conceptualized as alternative patterns of social conduct” (Mau, 2003, p. 23). Building on socialisation hypothesis, and the existence of institutionalised norms Pfau-Effinger (2005) argues, “ideas vary according to material interests of social groups, but ideas can also be shared by a majority of the population independent of their material interests “(Pfau-Effinger, 2005, p. 11). Thus, she argues that policies are a reflection not only of material interests and rational acts but also of cultural values and ideals. In this approach it thus becomes important to understand what happens when institutions change and there needs to be a renegotiation of the values represented in institutions and those found amongst citizens.

Svallfors (2006, p. 22) defines institutions as “rules of the game” which Pierson (2001) identifies as part of a tradition of ‘new-institutionalism’ (Pierson, 2001, p. 8). The role of institutions is commonly discussed in studies about attitudes to social welfare (Andreβ & Heien, 2001; Svallfors, 2006, 199, 2004; Larsen 2006, 2008; Mau 2003) and these authors are just a few examples of authors including discussions of the impact of institutions on attitudes. Blekesaune argues that the empirical support for the hypothesis that support for welfare state regimes’ impact and shape public attitudes is scarce (Blekesaune, 2007, p.394). However, there is some disagreement on the matter, as Andreβ & Heien (2001) find support for the impact of type of welfare state regime.

In addition one can divide between on the one hand those approaching the impact of institutions from more ‘mechanical’ or static perception of the effect of institution where “welfare attitudes of individuals can be directly deduced from long-term class (power resource theory), short-term self-interest (the new politics theory), or internalized values and norms (the culture theory)” (Larsen, 2008, p 147). On the other hand Larsen (2008) represents a more dynamic institutional tradition where “we try to operate with a more reflexive ‘political man’ whose policy attitudes are open to different perceptions of reality” (Larsen, 2008, p. 147). A more reflexive and more dynamic approach can also be found in Mau (2003) and may serve as a possible new tradition that emphasizes a more dynamic interaction between individuals self-interest, current context (i.e. reactions to changes in institutions and political circumstances as well as perceptions of the individual). The importance given to institutional factors in general and Esping-Andersen’s (1990) welfare regime typology in particular is a driver for emphasizing on understanding whether it has an influence on or explain support or changes in the support for welfare states as studied in this project.

In addition to being influenced by welfare state institutions, individuals may be influenced by other types of institutions such as *communities, family and political institutions.* Gough (2000) emphasise communities as a space for negotiation and learning about needs where values such as reciprocity and networking are emphasised (Gough, 2000, p.50). Furthermore, families are seen as important spaces for primary socialisation, and could be seen as important in shaping people’s attitudes. In political science political institutionsare particularly important when analysing welfare states. An example of this approach can be found in Bonoli (2000) where he analyses the recent pension reforms in Britain and Switzerland. Emphasizing different types of democratic political institutions he claims “this suggests that welfare state adaptation is politically feasible in systems characterised by numerous veto points, but will be less unilateral and will tend to include retrenchment as well as improvements in provision” (Bonoli, 2000, p.4).

Furthermore, and related to explanations emphasising concerns for specific groups and need as discussed previously, (e.g. Van Oorschot & Uunk, 2007b) we have the deservingness school of thought. This school of thoughts focuses on 5 criteria to explain why citizens may support or be more or less solidaristic towards groups of people in society; 1. Control (the less in control of neediness, the higher the degree of deservingness); 2. Need (the greater the level of need, the higher the degree of deservingness); 3. Identity (the higher the degree of group belonging, the higher the degree; of deservingness); 4. Attitude (the more grateful, docile, and compliant, the higher the degree of deservingness); 5. Reciprocity (the higher the level of previous or future payback, the higher the degree of deservingness) (Larsen, 2008, p. 149). As Larsen (2006; 2008) argues these may be treated as explanatory elements themselves, but could also be seen as processes through which for example institutions may influence attitudes.

Moreover, Feldman and Steenbergen (2001) highlight humanitarianism, defined as “the belief that people have responsibilities toward their fellow human beings and should come to the assistance of others in need” (Feldman and Steenbergen, 2001, p. 659), as an important explanatory variable when studying foundations for public support for social welfare in the USA. They find that “humanitarianism is more than just another predictor variable in models of support for social spending” (Feldman & Steenbergen, 2001, p. 673). Furthermore, in the USA, “The interaction between humanitarianism and confidence in the government suggests that support for social welfare policies may be withheld, not because of a lack of interest in assisting the poor, but because of concerns over the effectiveness of the government in supplying public assistance” (Feldman & Steenbergen, 2001, p. 674). As have been seen from the above discussion there are a range of explanatory approaches in the area, however, there are few clear schools of thoughts. Authors tend to study and include a range of explanatory factors in their studies, even though they may subscribe to a particular viewpoint. The following briefly discusses some of the most commonly mentioned welfare pressures that may have an impact on citizens’ support for the welfare state.

**Welfare pressures**

As the focus of this project is people’s support for the welfare state in relation to economic, social and political changes, the following is but a brief overview of the international changes that are seen to create new risks and social circumstances welfare states and its citizens may need to respond to. Many authors have explored and argued for and against different possible impacts of the pressures on welfare states yet “it remains unclear whether the welfare state has been restructured, the criteria of any restructuring and when it was restructured” (Powell & Hewitt, 2008, p.5). However, responses can be said to vary “depending on such things as countries’ relative economic vulnerability to those pressures, the relative capacity of their institutional structures to promote successful strategies for reform, and the relative success of the repertoire of policies they mustered in response” (Schmidt, 2002 p. 228).

In his work, Taylor-Gooby (2004) highlights four areas of change that are unsettling the relationships in the market and family that welfare states were organised around;. What makes these changes interesting in the setting of support for the welfare state is that the pressures these changes create together with the institutional responses may impact people’s attitudes to and support for welfare states. Taylor-Gooby (2008) found that “the shift towards an individualisation of responsibility for welfare outcomes constrains reciprocity, contradicts inclusion and undermines important aspects of trust” (Taylor-Gooby, 2008, p. 1). The individualisation of responsibility mentioned here has been part of welfare states response to the economic, social and political changes, which are the focus in this project.

As the pressures grow reforms to the welfare states seek to “restore the compatibility of social policies with the changing economic and demographic contexts” (Bonoli, 2000, p.1). Furthermore, it is argued here that citizens’ support for welfare states and their policies is crucial in this process. There is a high level of complexity in the area of changes in welfare policies and attitudes to welfare where policies, values and attitudes can be seen to mutually impact each other whilst at the same time being related to external influences such as globalisation and economic integration. As a result of the increasing pressures welfare states are facing and the need for support of the welfare state to maintain such institutions, this thesis explores, as Taylor-Gooby (2008), “whether shifts in direction damage the values necessary to ensure the future sustainability of state welfare” (Taylor-Gooby, 2008, p.1).

This project primarily analyses developed welfare states and will assume that welfare states’ maturity is a phenomenon that goes across pressures being a shared factor rather than a separate pressure. The challenge related to this aspect could include high level of welfare commitments and social expenditures. Thus, some argue that changes **“**not only give rise to the new social needs and risks, but also undermine the viability and effectiveness of existing welfare arrangements” (Zutavern & Kohli, 2010, p.177). However, and importantly when assessing the more negative predictions of the welfare state’s fate “analysis shows that the new pressures have not put an end to the viability of state welfare” (Taylor-Gooby, 2008, p. 5). As underlined the challenges will be referred to as welfare pressures in this document. The following will present examples of changes and challenges that are defined as social, economic and political pressures, and look at some of the policy responses within these areas. This is done so as to understand how these may frame and create a context for citizens’ support for welfare states discussed later in the chapter.

Social pressures

Social pressures, as defined here, consist of changes in the population such as an ageing society, changes in the family structure such as increased female employment as well as immigration. Firstly, the Western advanced capitalist countries included in this study have all experienced a combination of longer life expectancy through higher standards of living, and declining fertility rates. As Vickerstaff (2010) argues “ Whilst the fact that we are living longer and for many healthier older lives is a cause for celebration, it is increasingly being reframed as a major social, economic and political problem” (Vickerstaff, 2010, p. 869). The ‘greying’ of the population as a social problem is often framed in terms of increased cost, however, to which degree and how reliable calculations of cost are has, been subject to discussion. Furthermore, a greater old population means that the size of the employment active population is decreasing and some argue that a later pension ages is an ‘unavoidable’ fact and that the active workforce has to accept an increasing financial burden.

However, the ‘unavoidable’ fact of an increasing pension age has been questioned by some and alternative solutions have been promoted. Amongst these are increasing employment activity in the years before retirement age, when it tends to decrease, as well as more flexible solutions (Vickerstaff, 2010). In her study, Esser (2005) shows that “The current employment rate across European countries among persons aged 60-64 is currently below 30 per cent, although with widening cross-national differences” (Esser, 2005, p. 125). As a result one can argue that part of the problem is not so much a need for a higher retirement age or ageing but how to keep older workers in work until they retire. However, more current statistics show that this is higher than in her study. The low economic activity in the years before statutory retirement ages can be linked to globalisation and economic integration “as labour markets have gone through rapid technological change and business-cycle structured unemployment, the occurrence of temporary negative demand shocks have clearly contributed to poor labour market conditions and often high unemployment rated for persons aged 55-60” (Esser, 2005, p. 126).

The pressure politicians face in terms of an ageing population has been met with a range of responses. When tracing policy responses to an ageing population back to the 1970s policy responses we see that the type of responses have gone through big changes “From a rather broad consensus on the necessity of facilitating earlier exit, European policy-making has recently performed a high-kick turn in search of sustainable policies for the future- both in an economic and social (human capital) sense” (Esser, 2005, p. 127). In terms of differences across countries, this is particularly true in terms of the emphasis on full employment in countries as Norway, Sweden and Finland, where social-democratic parties remained strong (Esser, 2005). This is different from the focus of conservative regimes in continental Europe where policies “increasingly developed into insider-outsider labour markets, typically with low female participation and massive youth employment. With low, in periods even falling net employment growth, these societies were not producing employment to meet labour supply and early retirement routes were facilitated as a solution” (Esser, 2005, pp133-134). Now, policy responses have been focused on delaying effective exit from labour markets (Esser, 2005). However, there has also been a focus not only on goals of full/increasing employment, as in the Lisbon treaty, but also in broadening the focus of policies to areas such as tax, not penalizing those working into their 70s and education, to help older workers adapt to changes in the labour market (Esser, 2005). Furthermore the pressures will have different natures in different countries as the demographic shifts and social expenditure on pensions differ thus policy responses and urgency differs across countries. Here we are interested in understanding whether or not an ageing population may mean that there are generational differences in support for the welfare state, and also in terms of support for the elderly and pensions, and also whether institutional contexts and responses have had differential impact.

Within attitude studies, and as a result of the expected increasing financial burden on the working population, some authors have voiced worries of a breach of the intergenerational solidarity that forms the basis of the welfare states. If found this may mean lower support amongst younger generations for welfare spending on the elderly. However, Phillipson (2000) stresses an “interdependency of generations” (Phillipson, 2000, p.304) rather than less solidarity between generations. This finding may be supported by the relative high solidarity people have with pensioners compared to other groups such as the unemployed (Van Oorschot, 2008). Thus, worries about breaking down the intergenerational solidarity may be less well founded than some authors argue. However, pension reforms have been implemented in most western countries in recent years and care continues to be a topic of political discussion thus the relation between pressures and reforms and attitudes are important to understand and widely studies.

In addition to an ageing society, increasing rates of immigration are highlighted as a further change that may put pressure on established welfare arrangements. Schierup et al. (2006) analyses this as part of the context of globalisation “an increasingly essential feature of this global transformation of contemporary capitalism is the growth of global migration” (Schierup et al., 2006, p.5). It is also important to take into account that immigration, types of immigrants and the timing of immigration and ethnic diversity vary. . Some also argue that the welfare states of Europe in particular can serve as magnets for immigrants, “European welfare states, and those with more generous provisions, could attract low-skilled migrants from poor countries aiming to improve their socio-economic situation” (Van Oorschot, 2010, p. 19-20). However, this would require immigrants to have in depth knowledge about how the welfare systems work in different countries and it may disregard other reasons for immigration. These aspects will be discussed further in chapter 7.

It is important to have in mind, as with all the changes and pressures discussed in this project, that even though these are described as changes affecting all countries each country respond individually and possibly differently. Although, one thing is clear and that is the fact that all countries have to decide on what types of policies, border controls and not least what type of and if immigrants should get social rights. Van Oorschot (2008) points to one debate, which will be furthered explored in chapter 6, around immigration which highlights “a concern that immigration, especially from non-EU countries may threaten the sustainability of the ‘European Social Model’ and its national varieties” (Van Oorschot, 2008, p.3). His argument highlights the worry that it may threaten the solidarity and redistribution of welfare states, which is an argument Alesina, and Glaeser (2004) put forward. They point to the importance of ethnic homogeneity when explaining different attitudes and indeed welfare systems as the ethnic heterogeneity in the USA is related to a less generous welfare state and threatens support for inclusive citizenship. However, Alesina and Glaeser’s (2004) findings are contested as “Taylor-Gooby (2005) shows that, taking account of the usual factors noted above, diversity does have a negative impact on social expenditure, though much less so when the US is excluded. Moreover, once the influence of left politics is taken into account the influence of diversity falls dramatically” (Gough, 2005, p.17)

Related to this but with a different focus are the arguments presented by Castles et al. (2010) that argues that “it creates new needs resulting from a higher incidence of poverty among immigrants, it requires efforts to improve social inclusion, but may also help attenuate the demographic pressure of ageing” (Castles et al., 2010,p.12). Thus immigration can also be seen as a partial solution to an ageing society as it may represent a solution to the labour shortage described by amongst others (Vodopivec & Dolenc, 2008). However, Coleman (2006) disagrees and argues that immigration would be “so high that they would generate economically and environmentally unsustainable population growth rates and permanently and radically change the cultural and ethnic composition of the host population “(Coleman, 2006, p. 300). Another possible impact of higher immigration is that it may contribute to higher mutual understanding across ethnicities as “higher immigration would according to the cultural ideology theory enhance mutual understanding between distinct population groups” (Van Oorshot & Uunk, 2007, p.64).Thus, it is clear that different viewpoints in so far as the effect on immigration both on welfare arrangements and attitudes exist and the project aims to shed new light on tendencies found in the area.

Thirdly, the change in family structures which can be understood in great part as the changed position of women and their entrance into the workforce has put pressure on childcare facilities but also, importantly, put women in a difficult position in terms of care for the elderly in an ageing population (Taylor-Gooby, 2004a; Orloff, 2010). Here, we are interested in understanding whether these changes and responses to them may have impacted support for the welfare state (e.g. by specific groups in society) in general and for particular family policies particularly. Whilst it must be underlined that an increasing work participation of women and greater participation in public life can be seen as a positive development it does put pressures on welfare arrangements accommodating different gender roles and family structures. With changing family structures comes an “increasing demand from women for greater equality in access to education and independent employment” (Taylor-Gooby, 2004, p.3).

On the other hand one could argue that not changing as a result of women’s entry to the market could create a bigger pressure. Orloff (2010) argues that “Non-familial care services, both marketized and public, have developed, but women still do a disproportionate amount of unpaid care and domestic labour” (Orloff, 2010, p.256). The latter is even though we see some changes towards more equality in some countries (see for example  [http://www.eurofound.europa.eu/publications/htmlfiles/ef0854.htm/](http://www.equalityhumanrights.com/scotland/legal-news-in-scotland/articles/women-men-and-part-time-work/)). Again, different welfare states face different problems due to their differing structures and thus this aspect may cause a different type of pressure in a country with extensive public childcare services such as Sweden than in a country such as the UK where childcare is more dominated by private provision. As McDonald (2006) argues, a result of the varying levels of gender equity in advanced capitalist countries has been “a higher level of gender equity in social institutions is necessary to avoid very low fertility” (McDonald, 2006,p. 333), such as the ones we find in welfare states such as Italy. Care needs in general, and not only childcare, may be seen as pressurized resulting from both an increased elderly population and less informal care provided by women as their full-time. Together with the changes in family structures and women’s role, there has been an increased focus on gender and family policies in welfare state literature. This literature has been argued to contribute in two major ways; firstly focus on the need for reconceptualising the outcomes traditionally investigated and secondly it has “stressed the contribution of both gender issues and the political activity of women in the formation and development of welfare states” (Pierson, 2000, p. 800).

In addition to the social changes outlined so far the cultural approach underlines the emergence of new values developing as part of the social changes and globalisation. These are more directly related to attitudes, values and norms than the other welfare pressures. “Endogenous social changes, reflected in the new ‘post-industrial’ values related to changing lifestyles, attitudes toward work, and the role of women in particular, also had a significant impact on the welfare state, especially with regard to questions of equality of opportunity in employment and gender income parity (Schmidt, 2002, p.233). In addition to these changes in values, welfare states also face pressures from neoliberal ideas. Schmidt (2002) argues that they “were now also increasingly being applied to the structure of welfare and work, promoting individual responsibility for social security above a certain basic minimum, preferring market solutions over state or other provision in social services and pensions, pushing flexibility in wages and work conditions in place of equal pay and job protection” (Schmidt, 2002, p.233). As Castles et al.. (2010) argue “commentators and politicians in many countries urged that more attention be paid to the responsibilities as opposed to the rights of individuals, particularly responsibility to engage in the labour market” (Castles et al., 2010, p.9). This is clearly an ideological critique of some of the underlying values of welfare states, however, they are also argued to represent a challenge with “real-world political consequences” (Castles et al., 2010.p. 9).

In terms of the penetration of neoliberal ideas they seem to have penetrated the least in Scandinavian welfare states due to the long-standing value placed on equality and “the universalistic nature of the welfare state, with its high level of services as well as of employment and social security for all, ensured that the maintenance of a generous welfare state was in the interest of all” (Schmidt, 2002, p. 234). Neoliberal ideas have not made much headway in most conservative welfare states whereas the question “In Anglo-Saxon countries was how far to go in a liberal direction with regard to the promotion of individual responsibility and market reliance” (Schmidt, 2002, p. 234). In Scandinavian countries the policy concern was “how to protect social-democratic ideals of collective responsibility and equality in the face of retrenchment needs” (ibid) whilst the conservative countries were concerned with “whether and/or how much to alter their Christian-democratic family-based, gender and status differentiated model to promote either liberal or social-democratic ideals” (ibid)

When analysing how discourse and institutions interact and influence how pressures are dealt with in different countries, Schmidt (2002) did not find a convergence in values. She argues that policies and the institutional context remain different and differentiate countries. In particular, she finds that differences between single-actor versus multi-actor systems are significant to explain differences in discourses. However, it is not only the institutional context that matters, but also the content and thus values “where policymakers have provided the cognitive arguments on the economic necessity for reform without sufficient normative legitimization, they have often encountered great difficulties” (Schmidt, 2002, p.305). Thus, rational explanations of the need of reform are not sufficient to legitimise reforms, these needs to be based on legitimate normative values. In other words, intrinsic values found in a country, and thus welfare legitimacy matters as the importance of values in her analysis are not limited to the values of policymakers but also the general public through elections, organisations and institutions. This analysis adds to a purely rational understanding of policies as it underlines the need to appeal to values and normative criteria in policymaking. The approach also represents an alternative analysis of social and political changes and pressures, which can represent a fruitful understanding of attitudes and their changes. The next section will outline what is called economic and political pressures

Economic and political pressures

Political and economic pressures will be dealt with together here as they are even more intrinsically connected than with social pressures. This is partly due to the fact that economic necessities often are used as an argument by politicians to justify reforms. The close interconnectedness is highlighted by Pierson (2001) who writes extensively on how mature welfare states respond to these pressures. He argues that “Welfare states face vigorous and mounting criticism in the wake of major global economic change, both because of concerns about competitiveness and because economic shifts have altered domestic balances of political power.” (Pierson, P, 2001, p.1).

To start with, globalization can be seen to provide the context of various changes, and has occurred alongside technological changes which are changing production methods impacting labour markets as well as communication and transport technology. In other words the two are occurring at the same time and reinforcing each other. Yeates (2002) defines globalisation as “an extensive network of economic, cultural, social and political interconnections and processes, which routinely transcend national boundaries,” (Yeates, 2002, p. 4). Measuring globalisation is a ‘messy’ affair where disagreement is ripe; however, this project again takes an inclusive approach where we allow authors to define the concept themselves. For this reason the following will focus on some areas where we have seen changes as a result of globalisation that potentially influence established welfare states as well as citizens’ attitudes and support for the welfare state.

Starting with the labour market the effect of technical changes has been that “industrial employment declined and service-sector employment expanded” (Taylor-Gooby, 2008). Pierson (2000) argues that the responses of welfare states to the growth of the service sector and decrease of manufacturing sector to some degree correspond to welfare state regime and the nature of the problem also depends on the regime type.” Social democratic welfare states have expanded service provision without worsening inequality by increasing public sector employment” (Pierson, 2000, p.798) whilst public sector employment is limited in Conservative welfare regimes. Thus, following Pierson’s (2000) argument the dilemma and responses to changes in economic conditions and labour markets retain a distinctly national and welfare regime specific character which needs to be analysed further in terms of attitude tendencies.

Furthermore, due to technical changes, we can identify a “decline in the supply of unskilled jobs” (Taylor-Gooby, 2008, p13), which puts a higher premium to education and training. In addition, Pierson (2000) and others (Iverson and Wren, 1998) argue that the service sector that has taken over from the manufacturing sector has less potential to grow at the same rate and thus the large welfare states sector, which can be seen as a service sector, may be seen if not a barrier to growth but not increasing it either. This has been labelled a trilemma by some (Iversen and Wren, 1998).

European countries, more so than the American and Antipodean countries are also experiencing pressures as they “are experiencing historically high levels of unemployment due to changing labour markets” (Taylor-Gooby, 2001, p. 20). An example of the high levels of unemployment typical for the 1990s was reported in 1994 “There are 35 million people unemployed in OECD countries” (OECD, 1994, p. 1). These numbers will obviously vary with time and economic conjunctures. The report came to the conclusion that “To realise the potential gains, societies and economies must respond rapidly to new imperatives and move towards the future opportunities” (ibid). In the spirit of renegotiation rather than reducing the scope of the welfare state as a response to pressures Korpi (2006) argues that “The liberalisation of cross-border capital movements has to a significant extent turned the tables to the disadvantage of governments attempting to safeguard full employment…In the power-resources perspective, the return of mass unemployment and attempts to make cuts in social-citizenship rights appear as reworking of the implicit social contract established in Western Europe after the end of the World War II” (Korpi, 2006, p.263). As a result of the above we have seen studies including factors such as skills, occupation and similar to understand whether these now are more important in explaining welfare state support.

An important way globalisation influence welfare states is highlighted in Taylor-Gooby (2004); “the international competitive pressures resulting from economic globalization are significant in restricting the range of activities that states can pursue in fiscal and labour market policy, and indeed anything that bears on competitive advantage (Taylor-Gooby, 2004, p.31). As a result globalisation and economic integration limits efforts devoted to public expenditure and social protection expenditure making it more difficult for welfare states to redistribute (Adelantado & Cuevas, 2006). For the mature welfare state the issue is made more difficult to deal with due to the “high level of commitments into which welfare states have entered and which are now reaching maturity in relation to pensions, education and health care and other services, results in increasing costs (Taylor-Gooby, 2004, p.30). These pressures highlight a tension between welfare states on one hand and the market economy on the other hand (Pierson, C, 2001, p.165). Taylor-Gooby (2004) discusses privatisation, one result of welfare states trying to constrain costs, and argues that it “is not itself a risk, it can generate new risks when citizens-consumers commit themselves to unsatisfactory choices, and when regulation of standards in private provision is ineffective” (Taylor-Gooby, 2004, p. 4).

A discussion related to this is whether or not privatization does indeed mean cost savings, which may not always be the case as control mechanisms may have to be put into place. As a result, some argue that the “welfare state is now widely held to represent a burden on competitiveness, a burden manifest in punitive levels of taxation and assorted labour-market” (Hay, 2006, p.200). However, Hay (2006) argues that this does not hold up empirically; “positive correlation between social expenditure and economic openness” (Hay, 2006, p.201). In other words, it is not so that welfare states are uncompetitive, the reality is far more complex “The specific consequences of welfare provision will vary on a case-by-case basis, mediated by a range of institutional and cultural factures” (Hay, 2006, p.217). Thus, one of the main arguments is the notion of a race to the bottom. Castles (2006) argues that the argument “is only a variant of a more general argument: that enhanced international competition is destructive of regulatory standards across the board” (Castles, 2006, p. 226). Again, the argument will be that we will have welfare cutbacks to uphold competitiveness; “governments are seen as having little option but to accede to the demands of capital of lower taxes, a more flexible labour market and less ‘red tape’ around health, safety and environmental issues” (Castles, 2006, p.226).

Castles (2006) revises cross-national data to assess whether the theory is correct and find that “Despite cutbacks in a number of countries, our analysis demonstrates unequivocally that OECD *average levels* of social expenditure…either increased or remained constant between 1980 and 1998” (Castles, 2006, p.242). Gough (2005) supports this and concludes that economic globalisation pressures are usually mediated by domestic and international institutions, interests and ideas “(Gough, 2005, p. 16). However, it is important for this study to understand whether or not support has changed, and to what extent it may be related to globalisation and its many faceted consequences.

Related to globalisation and increased competitiveness, leading to pressure to limit social expenditure, are increases in inequality; “The chasm between the rich and the poor is becoming even wider” (Hendricks and Powell, 2009, p.4, see also Adelantado & Calderon Cuevas, 2006). This may be linked to factors such as increased immigration, technological changes, weaker trade unions, as well as capital mobility and growth of imports, which causes lower salaries and increased unemployment for the least skilled (Adelantado & Calderon Cuevas, 2006). However, on a global level other countries such as China may benefit from these changes as they take over some of the production and experience economic growth. Furthermore, there is no clear-cut evidence on this as inequality may increase within some countries, whilst decrease in others, and the findings also depends on how inequality is measured (e.g. Ghose, 2004).However, in attitude studies it is important to understand whether scarcity and inequality impacts citizens demand for government intervention in the area of Social Policy.

In addition to globalisation the EU is also seen as forming part of economic and political pressures. Even though the EU can be argued to have limited impact on Social Policy directly, Taylor-Gooby (2001) argues that the more important pressures stems from ‘indirect impacts’ of other important policies. These are; “the convergence criteria and the macro-economic requirements of the Stability and Growth Pact” (Taylor-Gooby, 2001, p. 18) and is also impacted by the four economic freedoms. European integration focuses on economic integration and contrary to what some might have argued Teague’s (2006) analysis “suggests that the EU lacks the institutional capacity to replicate existing national social systems. It has only sparse competencies in areas such as fiscal redistribution, health and education, social benefits, pensions and even central matters relating to the employment relationship such as pay and industrial action” (Teague, 2006, p. 283). However, the EU does have an impact and as Teague (2006) argues, “In a sense, European integration has created an acute political dilemma for labour market governance inside the EU. On the one hand, as a result of the deepening institutional and market interdependencies, it is hard to see how purely national social systems in Europe can be economically or institutionally efficient; on the other, the political and institutional foundations are not in place for a fully integrated European model of economic citizenship” (Teague, 2006, p.283). On the other hand the EU also imposes positive pressures in so far that they aim to deal with Social Policy issues such as inequality and poverty (Perrons & Plomien, 2010). However, some authors (Rhodes 2000; Graghl & Teague, 2000; Pierson, P2001) highlights that “the formation of Economic and Monetary Union creates new constraints which will intensify demands for retrenchment” (Pierson, P, 2001, p.1).

In terms of pure political pressures some argue that citizens may become less deferential to politicians and more self-confident citizens as they now have “Greater acquaintance with the variety of cultures and of approaches to social issues nationally, as well as higher standards of education and greater access to information” (Taylor-Gooby, 2008, p.14). If this is true it could mean citizens putting greater demand on politicians to respond to needs, however, one could also argue that it could lead to more divided welfare provision as some are more influential and better at organising their efforts than others.

**Conclusion**

Welfare states face pressures on several fronts; however it is also clear that the nature of the problem and their response vary and depends on existing institutions and social circumstances in each country. In addition there are a range of quite different views amongst academics in so far as the type of impact, negative or positive, pressures may have on welfare states. As we have seen by the examples discussed, responses and the nature of problems will differ by country. For this project the interplay between changes, welfare state responses, welfare cultures and attitudes will be the focus. Thus the question becomes tendencies in attitudes to understand whether there for example are new class coalitions, social polarisation or changes in public support for welfare systems as a result of changes. A set of different approaches to the study of support for the welfare state has been discussed, and it is expected that the synthesis will provide and add to the following approaches: problematize and add to findings by levels of generality, socialisation, self-interest, institutional impact of welfare regimes as well as deservingness theory.

# Chapter 3. Methodology: Research design and considerations

**Introduction**

The thesis’ main method is an adapted version of a systematic review research design, situating it in the middle between the approach’s critics and supporters. This is an approach not previously used in this area and enables a systematized literature review, as well as being a mapping exercise of what we know and do not know about support for the welfare state. A systematic review is typically defined as a method that gives a comprehensive review of current knowledge through a rigorous and comprehensive approach to both data collection and analysis. In its guidance the Centre for Research and Dissemination (CRD) defines systematic reviews as reviews that “aim to identify, evaluate and summarise the findings of all relevant individual studies, thereby making the available evidence more accessible to decision-makers” (CRD, 2009, p. V). From this it is clear that, within this approach, there is a drive towards dissemination and policy making implicit in the method, something that will be discussed in this chapter. The project argues that systematizing knowledge in the area can help not only identifying research traditions and trends in support, but also in building and creating theory. Systematic reviews can create a good basis for theory building as their approach it serves to give an overview of the range of knowledge in an area, and systematise findings of approaches used up until now to explain support for the welfare state. This can help serve as a basis for identifying dynamics and relationships in the area, including areas poorly studied, and thus form basis for developing theory and to further our understanding of the dynamics at play.

It is also argued that realist synthesis is helpful when conducted in the Social Sciences and when one aims to conduct an academic review, as it takes into account the complexity of social phenomena. Furthermore, realist synthesis has an emphasis on finding and developing explanations of ‘what works in what circumstances?’ through comparing and contrasting findings and theories, rather than a cumulative additive approach of ‘what works’ without taking into consideration context and underlying mechanisms.

Heterogeneity of studies is argued to be of importance in the Social Sciences both by describing the studies identified, and in terms of valuing different approaches and findings. Relating to and criticising accumulation of findings the project builds on Popper (1963), who argues that explanations should be tested and potentially falsified. The need to test explanations can be argued to be of particular importance in academic reviews seeking to enhance understanding of explanatory approaches and their relation to empirical trends. Thus, the research synthesis will emphasise what explanations are confirmed or falsified. The latter is not part of a traditional systematic review approach, an approach that accumulates findings valuing homogeneity. Falsification in a traditional systematic review approach enters at the point where the full findings from a review are used to falsify other reviews or studies or reviews. In other words, the capacity of one well-structured study to falsify a number of other studies by identifying a case that contradicts the pattern identified in a systematic review is not recognised in a traditional systematic review. Thus, its finding would either not be taken into account or seen as a negative aspect adding to the heterogeneity of a review when accumulating findings and explanations. This study argues that this is problematic as the findings from one study may be important in falsifying findings from a series of other studies included in a review.

It is argued that the use of systematic review methods has several weaknesses in the Social Sciences, which is why an adapted version of a systematic review is used. The argument is thus that scholars wishing to make use of systematic review methods in the area needs to take these weaknesses into account, and make use of adapted tools from the systematic review tradition to carry out a fully comprehensive review. The adaption is based on issues encountered during the pilot study as well as critical voices in the literature. Issues include US biased databases, lack of importance given to judgement and the use of a hierarchy of evidence within the systematic review tradition. Furthermore, there is a need for an iterative approach that values the heterogeneity found in areas of the Social Sciences rather than a predetermined and unchangeable process. The following will provide a brief overview of the development of systematic review as a method, followed by a discussion of criticism of the approach and finally the approach used in the thesis.

**The two tales of SR’s emergence**

The history of the emergence of the recent development and boost of the systematic review tradition can be told in more than one way; depending on whether a supporter or a critic of the systematic review is telling the tale. The following will give two very brief versions of the story. However, I expect that there are yet other versions of the story. One thing is widely agreed upon however, and that is that the recent growth of systematic reviews advanced as a result of the development of meta-analysis as an alternative to traditional, narrative reviews of research literature (Hammersley 2001, p. 543). A second point that is agreed upon is that systematic reviews could be described as “one of the success stories of the 1990s. In the space of ten years the movement has had a significant impact on health care and policy” (Trinder & Reynolds, 2000, p. 1). Proof of this ‘success’ can be found by simply pointing to the number of research centres and collaborations that have been established in various areas: UK Cochrane Centre in 1993, NHS Centre for Reviewers and Dissemination in 1994, Campbell Collaboration in 1999 and EPPI centre in 1993 are amongst the most prominent advocates and producers of systematic reviews. A third driver of systematic reviews is the policymakers themselves who increasingly seek research projects that can provide input and advice on new policies.

It is when we start looking at the reasons for the emergence of systematic reviews and meta-analysis that the divergence of begins. On one hand we have the promoters of the tradition of systematic review, often stemming from health care or simply being advocates of a more positivistic model of research. On the other hand are scholars and critics who look at methodology in a different manner, and who often highlight the complexity of the social world together with the importance of judgement when criticising systematic reviews, as we will see later on in the chapter. The latter also represent different views on how we approach and enhance knowledge.

From the point of view of the advocates of systematic reviews the emergence and need for systematic reviews can be explained mainly by two factors, information overload and the limitations and bias of traditional reviews. Information overload is a growing issue as new information keeps getting produced together with the advance of technology enabling information to become ever more accessible and shareable. As a result an array of information can be found on any given subject. However, little guidance is provided about how reliable this information is or where to find what would be the most valuable information in any given situation. The result of this is that systematic reviews “may provide robust, reliable summaries of the most reliable evidence: a valuable backdrop of evidence on which decisions about policies can draw” (Petticrew & Roberts, 2003, p. 11). The importance of policy makers as both drivers and beneficiaries of systematic reviews is here underlined.

The second factor emphasised by the promoters of systematic reviews is that traditional literature reviews are easily biased and thus create a need for a new method that can provide unbiased and less flawed reviews. Not only may literature reviews be flawed because of the lack of transparency but also because they will base their conclusions on single studies that in themselves might produce flawed recommendations, as they don’t encompass results from other populations or samples. CRD’s guidance for systematic reviews highlight that they are needed because they accumulate evidence from multiple studies which may prevent practitioners and policymakers from basing their decisions on single studies that might be flawed and biased (CRD, 2009, p. V).

An example from the decision-maker and political side supporting the view of the promoters of systematic reviews is a quotation from a speech made by David Blunkett. The speech was about whether the Social Sciences can improve policymaking; “I invite social scientists to work with us to find out what works and why and what types of policy initiatives are likely to be most effective. This is crucial to our agenda for modernising government” (Blunkett, 2000). This increased focus on systematic reviews and the assessment of intervention has also been labelled the ‘what works?’ approach to research and was even highlighted by Barack Obama in his inaugural speech *“*The question we ask today is not whether our government is too big or too small, but **whether it works**” (Obama 2009).

The other account of the emergence of systematic reviews tells the tale from a sociological angle. In their book ‘Evidence-based practice: A critical appraisal’ Trinder et al.. (2000) gives a critical account of the increase of evidence-based practice and puts what are identified as the reasons most commonly listed by the promoters of evidence-based practice into context. Reasons such as information overload, an emphasis on practice, and flaws of single studies are not seen as sufficient to explain its emergence. Thus, Trinder and Reynolds (2000) look to the societal changes and mechanisms to explain the development of evidence-based practice. If one looks at the wider societal tendencies, Trinder and Reynolds (2000) argue society has developed into a society where risk avoidance with a lack of belief in science and the growth of an audit society are common denominators. In other words the quote “Organised distrust gives trustworthy reports.”(Noonan 2009, p. 4) can be understood on the ground of the societal context it is part of. A more one-sided comment than those made by Trinder et.al is found in Pawson and Tilley (1997); “we live in a knowledge-centred, value-adding, information-processing, management-fixed world which has an obsession with decision making” (Pawson & Tilley 1997, p. xii). So, by analysing the emergence of systematic review together with its context systematic reviews may be seen as a way to improve belief in science through methods that have stringent requirements regarding transparency and reliability. In addition systematic reviews emerge as part of an audit and management society where decisions should be transparent and research should feed into decision-making. In the words of Trinder and Reyonlds (2000) the emergence of systematic reviews needs to be seen in relation to its context which is a society where “preoccupations with risk, ambivalence about science and professional expertise, and the concern about effectiveness, proceduralisation and the consumer’ thrive” (Trinder & Reynolds, 2000, p. 12).

The next section of the chapter will outline and discuss how systematic review methods are approached and used in this thesis, and it will introduce and draw on realist synthesis as a complementary tool to carry out a review in a complex area such as Social Policy. It is not argued that tools from systematic review are not useful, and the project agrees with those arguing for it being a useful approach to review knowledge on an issue in a knowledge driven society where production of studies have increased. However, as argued it does need to be used critically, in particular in a diverse and heterogeneous area such as the Social Sciences. Thus, it is argued that the need for iteration and judgement, as well as theory is fundamental in an academically driven review, and it is here that the realist synthesis approach proves useful. It will be argued that the theory driven approach where accumulation of knowledge is driven by a focus on the logic of inquiry, and underlying explanatory mechanism rather than addition is particularly important when understanding and explaining support for the welfare state in particular, and the Social Sciences in general.

**3.1.2 Main criticisms of systematic reviews**

The following will begin with a discussion of the main criticisms made to the way a systematic review is typically carried out, with a focus on replication, the use of a hierarchy of evidence, not taking context into account and will also introduce a complementary approach to research through the realist synthesis approach.

The principle of a review being replicable is one of the defining principles of a systematic review, and is achieved through documenting and making every step of the review transparent. The assumption is that by “making a study replicable reliability can be assessed” (Hammersley 2001, p. 545). Replication is also one of the most contested and criticised principles of the tradition of systematic reviews. Hammersley describes it as a positivistic model of research since “it assumes that documentation and procedures minimise and almost eradicate the impact of a researchers judgement” (Hammersley 2001, p. 544). He on the other side argues that “judgement is involved, it cannot be eradicated and attempting to eradicate it is unlikely to serve the task of research well” (Hammersley 2001, p. 545). Judgement and a researcher’s tacit knowledge are in his view fundamental as a researcher needs to use his/hers judgment to make the best decisions when analysing empirical material, deciding which design to be used etc. Pawson (2006) agrees with Hammersley on this point and criticises the principle of reproducibility on two accounts. One issue is the fact that it is impossible for every point of the review to be documented as judgement at some point enters. In a review one is” faced with an endless task that has, at some stage, to be arbitrarily terminated. This requires judgement, and I am inclined to believe that it happens in all forms of review” (Pawson 2006, p. 26).

Pawson’s second criticism points to the philosophical principle of replication. His stance is a “model of validity that rests on refutation rather than replication” (Ibid). In other words he doesn’t dispute the need to show what work has been done on which methodological grounds, the difference is that clarity is sought for another purpose, namely that of exposing the findings to criticism. Hammersley agrees on this philosophical point of view and argues that it is the principle of refutation that contributes to continuous development of knowledge as theories challenge each other rather than accumulation of knowledge, which is assumed in the tradition of systematic reviews. Even though Pawson and Hammersley come from different philosophical traditions, clarity is still important in a research project. However, validity is not seen as being a result of standardised and replicable methods but from constant exposure to criticism and challenging theories (Pawson 2006, p. 26).

Here, we agree with the argument posted by Hammersley focusing on the lack of importance given to refutation and falsification in a traditional systematic review. This argument is also important in terms of appreciating the value of heterogeneity amongst studies in the Social Sciences, as with the point that refutation can be argued to be central in a research process. Gilbert (2008) argues that this is true in three ways “First, by directing attention to ‘awkward cases’ it helps to improve theories. Second, it has been argued that it is a useful criterion for what should count as theory. The criterion is that it must be possible *in principle* to falsify a theory. That is, it must be possible to imagine some data which, if found, would demolish the theory” (Gilbert, 2008, p.29). As a result this thesis project emphasises explanations, and explores whether they contradict and refute each other rather than using a simple accumulative approach to research synthesis.

Petticrew & Roberts (2003) on their side criticise other traditions of thoughts and argue that systematic reviews can serve as a challenger to established theories and schools of thought; “Systematic reviews allow challenge to the paradigm to occur – a challenge permitted by close examination of the underpinning evidence” (Petticrew & Roberts, 2003, p. 20). However, this argument underlines rather than refutes that there exist different philosophical views. This project will follow the idea that judgement is impossible to eradicate but will continue to strive to be as transparent as possible. Thus, it parts from the argument that judgement enters at some point, and it might not be a bad thing. In addition we need to critically assess whether we can indeed challenge a paradigm based on evidence found in a systematic review as they may be from different levels of generality and thus lower level evidence from primary empirical findings may not challenge a higher level of generality such as general ideas of causality (Stinchcombe, 1968). This is an area in which traditional systematic review approaches seem to be lacking a discussion and critical analysis and one that will be included as part of the quality criteria used in this project.

The second element that is frequently challenged is what is called the ‘hierarchy of evidence’. This is a principle built on methods most frequently used in the area in which systematic reviews first emerged, namely health care. In brief a hierarchy of evidence in systematic reviews is a hierarchy of different methodologies which guides the importance of a study’s findings will be given in the review, the quality assessment and whether they will be included in the review. The hierarchy is rated by the criteria of internal validity, and methods assumed to have higher validity are rated higher than those with lower validity:

1. Systematic reviews and meta-analysis

2. Randomised controlled trials with definitive results

3. Randomised controlled trials with non-definitive results

4. Cohort studies

5. Case-control studies

6. Cross-sectional surveys

7. Case reports

(Petticrew & Roberts, 2006, p. 58)

The result of applying this kind of hierarchy of evidence may be that a review excludes studies that have not used randomised controlled trials. Evans & Benefield (2001) are amongst those who argue that the government thinking in general about evidence-based policy and practice and hierarchy and evidence in particular may limit diversity of research as “The model of research that best lends itself to reviews of the effectiveness of intervention is that of experimentation” (Evans & Benefield 2001, p. 539). Thus as a result research may be driven towards a ‘medical model’, which might lead to less research into wider social issues which might also be important to policy (Ibid). Hammersley also questions the use of hierarchy of evidence and asks, “Is valuable evidence being overlooked and misleading evidence being privileged? (Hammersley 2001, p. 546). His argument is that it is not so that one methodology has all the advantages and the other all the disadvantages, it will depend on the purpose of the study (Ibid). In other words the preference for methodologies depicted in the example above might lead to exclusion of studies that can have important contributions to knowledge. A more commonsensical critique can be made by highlighting the difficulties one might encounter when conducting experiments and randomised controlled trials in a social world. An example would be the fundamental lack of control over the variation of other variables and the lack of awareness of other variables that might influence an experiment.

Those in favour of hierarchies of evidence see it has a tool to ‘help decision-makers select what sorts of studies they should prioritize when seeking research evidence to help answer clinical questions’ (Petticrew & Roberts 2003, p. 58). This shows that there is some awareness of where a hierarchy of evidence might be less controversial. There has been a movement amongst the promoters of systematic reviews towards a model called ‘fit for purpose’. Here methodologies are included to see whether they are fit for the purpose of the study to ‘consider which type of study is most appropriate for answering your review question’ (Petticrew & Roberts, 2003, p. 59). As a result of this movement amongst promoters of systematic reviews when it comes to the hierarchy of evidence followers of the systematic review tradition have accepted the inclusion of qualitative studies in reviews when it is ‘fit for purpose’. Still the positivistic model of replication and transparency apply, and new guidance has been produced by review centres to ensure transparent procedures are followed also when reviewing qualitative studies (See websites from Campbell collaboration, CRD etc.).

For the purpose of this project and to avoid any methodological issues around this a hierarchy of evidence will not be created nor used to exclude studies or assess quality of methodology. Driving this decision is the fact that the purpose of the study is to assess knowledge produced about attitudes. Excluding studies on the basis of a hierarchy of evidence might be counteractive to answering the objective. The project also agrees with Hammersley (2001) when he argues that no one method has all the advantages and the other none, thus when assessing the quality rather than giving higher importance to a certain kind of methodology this project will embark on a critical appraisal of general methodological criteria with the aim to assess this as a tool and will also include an analyse-and-appraise approach as introduced by the realist synthesis approach. The specific way this will be approached, or how the thesis separate the wheat from the chaff, will be addressed in the next section.

A third criticism of the systematic review tradition is made by Kitson et al.. (1998) as they underline the need to include the context when assessing evidence of effectiveness of an intervention. In other words reviews should not simply look at measures of results of a particular intervention but also need to take into consideration the context in which the intervention was implemented. This highlights a need for a broader contextual view that is also supported by the realist synthesis tradition developed in part by Ray Pawson. In brief realist synthesis is a type of review that, rather than judging ‘what works’, seeks “to explain, and is driven by the question ‘What works for whom in what circumstances and in what respect?” (Pawson 2006, p. 18). This stems from a criticism of traditional systematic reviews arguing that it has “pursued too single-mindedly the question of whether a program works at the expense of knowing why it works” (Pawson & Tilley 1997, p. xv). What drives a realist synthesis are the mechanisms and the context rather than a specific programme or intervention. In other words the importance of context and also theory is taken one step further than in Kitson et al.. (1998) who still remains within the realms of systematic reviews. When the words mechanisms and context is emphasised in realist synthesis it means understanding the underlying mechanisms of what causes a specific outcome, and is based on a logic of enquiry where explanations rather than arithmetic accumulation through addition of findings is used. Pawson et al. (2004, p. 2) in particular underlines a ‘generative’ approach and understanding of causality, hallmark of realism, where findings and explanations generate and impact further approaches in the review and where an iterative and dynamic approach is taken. Rather than a simple X causes/or not Y approach **“**The generative model calls for a more complex and systemic understanding of connectivity. It says that to infer a causal outcome (O) between two events (X and Y) one needs to understand the underlying generative mechanism (M) that connects them and the context (C) in which the relationship occurs” (Pawson et al., 2004, p. 2).

Thus, rather than, as in traditional systematic reviews, accumulating findings through methods such as meta-analysis in way where homogeneity is praised over heterogeneity, realist synthesis emphasises explanations. Again, this does not mean that systematic reviews can’t contribute to knowledge; however, they may miss important findings through their approach. Furthermore, accumulation of knowledge also goes against the philosophy of refutation, an aspect seldom acknowledged in their literature. As the thesis assumes that contexts will influence changes in outcomes and we have a theoretical framework emphasising and highlighting expected effects and underlying causes the approach can be expected to be helpful in answering the research question.

Not only does realist synthesis disagree with the principle of replication favouring that of refutation as we have seen previously. Realist synthesis assumes that rather than using findings from evaluations on a case to case basis, there are common component in quite diverse interventions and findings that could be used to inform diverse future interventions and programmes (Pawson 2006, p. 12). It is important to underline though that the function of realist synthesis and systematic reviews remains the same; “to be used in decision on whether and how to implement future interventions (Pawson 2006, p. 9). In terms of the approach to how to enhance knowledge realist synthesis as an approach is in line with Hammersley (2001). He argues that studies should not be cumulated in the way meta-analysis does it as studies have not necessarily addressed exactly the same issue nor in the same way, they may have complementary and contradictory findings rather that cannot be aggregated as if they are the same. In other words the way in which addition is done in systematic reviews is problematic.

Realist synthesis instead focuses on identifying patterns of knowledge, examining how findings and inferences fit with previous knowledge and theories and thus building a framework of what works in what circumstances. Pawson et al. (2004, p. iv) argue that realist synthesis “complements more established approaches to systematic review, which have been developed and used mainly for simpler interventions like clinical treatments or therapies.” This thesis will thus make use of approaches taken from this approach as the review is focusing on a complex issue that necessitates an approach that takes into account this complexity. In other words, in addition to making use of tools from systematic review, I aim to make use of and assess the usefulness of realist synthesis as part of the thesis. Overall, the thesis argues that when reviewing literature in this area, reviewers should take into account and be aware of the value of iteration, judgement, context and heterogeneity between studies, and be careful when making use of principles and approaches that emphasise replication, transparency, uniformity and predictability, hierarchy of evidence, homogeneity.

**The approach**

To reach the research objectives of this project a variety of methods will be applied that take into account the complexity and multilevel nature of the area studied. The research design takes the form of a literature review striving to follow the transparent and orderly characteristics of a systematic review. The thesis also explores alternative approaches to meta-analysis due to the variety of methods and findings of the included studies and includes elements from realist synthesis, to achieve a comprehensive review of ‘what works’. The following outlines an approach to reviewing knowledge about support for the welfare state in face of current welfare pressures and a discussion of approaches that will be included and explored to get closer to an understanding of what approach may do this better from data collection to data synthesis. Through a critical evaluation of the use of tools from the systematic review this thesis takes an approach to reviewing the literature and answering the main research question that draws on realist synthesis theory

Petticrew and Roberts (2003) defines a systematic literature review as “a method of making sense of large bodies of information,…a method of mapping out areas of uncertainty, and identifying where little or no relevant research has been done, but where new studies are needed” (Petticrew & Roberts, 2003, p. 2). This is an approach not previously used in the area of support for the welfare state, and enables a systematized literature review, as well as being a mapping exercise of current knowledge. The research design allows the project to conduct a comprehensive review, which can produce better knowledge of what we know and do not know, as well as to identify methodological weaknesses and strengths amongst studies in the area. The increasing use of this methodology, discussed earlier, is exemplified by the following quote from Sandelowski et al. (2006); “Over the last two decades, scholars in the practice disciplines have increasingly turned to evidence-based practice to facilitate better use of research findings and to close the research-practice gap” (Sandelowski et al., 2006, p. 2).

Systematizing knowledge in the area can help not only identifying research traditions but also in building and creating theory as systematic reviews identify the range of knowledge, provide material for developing and testing theory as well as point to areas where theory building is needed. An additional strength of the use of tools from systematic review as well as realist synthesis is that hypotheses and new approaches may be created based on a cross-disciplinary overview of all current knowledge in the area, something not usually achieved as researchers tend to operate within the realm of their own discipline.

Using tools from the systematic review tradition also enables the project to embark on a critical appraisal of current methods and knowledge allowing for suggestions for future research not only in terms of areas rarely focused on but also in terms of new, or alternative methods. Issues around quality appraisal, and the alternative approach to this used in realist synthesis will be discussed later on. Findings from the quality appraisal will be addressed in chapter 4. Overall, it is argued that the use of systematic reviews has several weaknesses in the Social Sciences which is why an adapted version of a systematic review is used, and why tools from realist synthesis is also included. The adaption is based on issues encountered during the pilot study as well as critical voices in the literature. Issues include US biased databases, lack of importance given to judgement and the use of a hierarchy of evidence within the systematic review tradition. Furthermore, the need for an iterative approach rather than a predetermined and unchangeable process was found important in the pilot study.

The project has chosen to focus on support for the welfare state in general to identify general trends in support for the welfare state in relation to welfare pressures that have been argued to challenge welfare arrangements. It also carries out an in depth synthesis of redistribution and immigration. The latter choice was made to enable testing of adapted ways of synthesising research in the area of immigration and support for the welfare state, as well as redistribution as one measure of support for the welfare. Thus, the project focuses on support for the welfare state when related to welfare. As can be seen from the table below, although the main focus has been on testing out systematic review approaches, the process of the thesis has made use of elements from both the systematic review research process and a realist synthesis research process. In the table below the left hand column represents systematic review approach and the other two that of a realist synthesis approach.

The thesis, through establishing a theoretical framework, and refining its original research question and scope can be argued to fit with the funnel-like approach taken in a realist synthesis as seen in table 3.1. In the process of the thesis project the research question, search strategies, a theoretical framework, the quality appraisal and research synthesis were all established through the usage of a range of approaches both from the more traditional systematic review as well as realist synthesis. A result of this process, and one of the outcomes of this thesis, was to the need to focus on iteration and generative mechanisms, both, central in realist synthesis. In other words, the going back and forth, letting findings and developments influence and slightly change the path and focus was found to be a natural way forward generated by the findings made on the way. For Pawson et al. (2004) this is a strength, as it helps to narrow down and identify what works in what circumstances, and may help us understand and explain the identified trends in support for the welfare state.

Realist synthesis is argued by Pawson et al. (2004) to be “a way of adding rigour and structure to what has been called the ‘old fashioned narrative review’ which, if approached in a scholarly fashion, was able to present highly detailed and reasoned arguments about the mechanisms of programme success or failure and about the apparently conflicting results of ‘similar’ studies” (Pawson et al., 2004, p.1). Thus the use of realist synthesis is seen as complementing and adding to the comprehensive and systematic approach sought in systematic reviews, but made difficult due to the particular features of the Social Sciences.

## Table 3.1 Realist synthesis: an introduction (Pawson et al., 2004, p. 29)

|  |  |  |
| --- | --- | --- |
| Define the scope of the review | Identify the question | * What is the nature and content of the intervention? * What are the circumstances or context for its use? * What are the policy intentions or objectives? * What are the nature and form of its outcomes or impacts? * Undertake exploratory searches to inform discussion with review commissioners/decision makers |
| Clarify the purpose(s) of the review | * Theory integrity – does the intervention work as predicted? * Theory adjudication – which theories about the intervention seem to fit best? * Comparison – how does the intervention work in different settings, for different groups? * Reality testing – how does the policy intent of the intervention translate into practice? |
| Find and articulate the programme theories | * Search for relevant theories in the literature * Draw up ‘long list’ of programme theories * Group, categorise or synthesise theories * Design a theoretically based evaluative framework to be ‘populated’ with evidence |
| Search for and appraise the evidence | Search for the evidence | * Decide and define purposive sampling strategy * Define search sources, terms and methods to be used (including cited reference searching) * Set the thresholds for stopping searching at saturation |
| Appraise the evidence | * Test relevance – does the research address the theory under test? * Test rigour – does the research support the conclusions drawn from it by the researchers or the reviewers? |
| Extract and synthesise findings | Extract the results | * Develop data extraction forms or templates * Extract data to populate the evaluative framework with evidence |
| Synthesise findings | * Compare and contrast findings from different studies * Use findings from studies to address purpose(s) of review * Seek both confirmatory and contradictory findings * Refine programme theories in the light of evidence |
| Draw conclusions and make recommendations |  | * Involve commissioners/decision makers in review of findings * Draft and test out recommendations and conclusions based on findings with key stakeholders * Disseminate review with findings, conclusions and * recommendations |

The theoretical framework tested and used in this thesis was discussed in the previous chapter and we can see the different schools of thoughts and explanations as a starting point to which findings will be added to strengthen or contradict expectations based on their theories. The next section will discuss the review protocol and the approaches taken in the review.

**A Systematic Review process**

As discussed the systematic review tradition has expanded rapidly in recent years. The tradition began within the healthcare and practice dominated areas such as education, but is now used more and more widely. The focus of the tradition has been on specific research questions, and evaluations of interventions and reforms. Sundberg and Taylor-Gooby (2013) summarize the division between advocates and critics of the systematic review tradition as follows “advocates believe SR has considerable value in summarizing key points across rapidly expanding fields of knowledge and is of particular relevance to policy-makers. Critics see it as positivistic, limited and a creature of audit culture” (Sundberg & Taylor-Gooby, 2013, p. 417).

A systematic review can be broadly defined as “review of the literature that aims to provide an account of the literature in a domain that is comprehensive, capable of replication and transparent in its approach” (Bryman 2008, p. 700). However, the tradition includes predefined strategies, highlighted by Bradshaw (2000); “A systematic review has clearly identified questions, searches for relevant research following a procedure specified in advance, has criteria for which studies to include, has criteria for the information to be considered from these studies, appraises studies using clear criteria for what is good and what is less good research and synthesises the results in a transparent fashion, sometimes using statistical pooling” (Bradshaw et al.. 2000, p.6). This predefinition based on the principle of replication is as we have seen on of the aspects that has been criticised. This review, by subscribing to criticism made find that judgement and iteration comes into play even when creating a review protocol and thus finds support for an approach more similar to RS. Driving the choice of research design in this project is more than anything the need for a comprehensive and transparent review, where choices are critically discussed underway. It is argued that when assessing a wide range of knowledge it is important to use a systematic strategy to identify and analyse the material which may lead to an outcome that “summarize the balance of the evidence in certain areas of practice” (Bryman 2008, p. 86). The need to provide a balanced summary of knowledge where every step is scrutinised, is especially important in this project where the aim is to assess other researchers’ work which in itself may evoke criticism. An adapted systematic review design, including tools from realist synthesis was also chosen to get an accurate picture of the evidence in a topic area which in itself may help give direction to future research (Petticrew & Roberts 2003, p. 21).

To anticipate methodological and practical problems as well as to test inclusion criteria, a pilot was conducted for this study, which was finalized early 2010 and presented at the Social Policy Association’s annual conference in July 2010 (Sundberg, 2010). The results helped inform the main stage of the research project in every step of the review process. The pilot was a useful exercise in so far as it provided a lot of learning in terms of organising search results and numbers of inclusions and exclusions. It also provided learning about the databases (i.e. different coverage of different databases) themselves and how to minimise the US bias of the larger databases. Furthermore, the findings underlined the importance of addressing differences in vocabulary in different disciplines, as the importance of ensuring inclusion and coverage of books and research papers in the Social Sciences. It is thus argued that systematic reviews in the Social Sciences need to take these issues into account to counter the weaknesses that not doing so might incur.

Due to the breath of the study and the broad nature of the research objective some might question whether this thesis can be a systematic review as it may be defined as a review that “bears on a particular question” (Littell et al., 2008, p. 1). The result of having a too broad question may be that the amount of studies identified will be too high to manage and the synthesis too complex. However, as this project, one might choose to follow the argument of Coren & Fisher on behalf of SCIE “Systematic review methods can be applied to any type of question...transparent and replicable methodology should be applied to all forms of literature review in the interests of quality and reliability” (Coren and Fisher 2006, p.2). Furthermore, the pilot showed that it is possible to select a random sample to ensure that the amount of studies to analyse is manageable. Randomisation does not increase bias as studies are randomly chosen, and decrease the number of studies chosen for full review to a more manageable number.

As discussed above, inter-rater reliability and replication are two values often highlighted when conducting systematic reviews in order to minimise bias. However, it could be argued that the stringent validation requirements of a systematic review testing effectiveness of an intervention are less necessary in this project due to the different objective of this study. In addition, most systematic reviews are conducted in a team and enabling tests of validation and replication as various researchers can go through items to test replication and validate inclusion, data extraction as well as to discuss the review protocol and search strategies. For a PhD researcher working alone this is obviously difficult, but to address these issues the search strategies, selection of databases and the review protocol has been formed both in discussion with (and is continuously scrutinised by) the supervisors and with two specialists in systematic reviews from the Centre for Evidence and Practice. Furthermore, concepts and words in the search strategies were shaped by communicating with authors of articles and books included in the pilot to ensure that the search strategies were as exhaustive as possible. Again, since this study is not a pure systematic review it can be argued that the validation processes can be applied differently than in a ‘full’ systematic review. The next part of the chapter will discuss the review protocol and design of the adapted systematic review applied in this project, shaped to be able to assess the utility of a SR in this area.

**Research design and review protocol**

The first task before initiating a systematic review is to assess whether a review has already been done in the area, the second is to choose the review team (CRD 2009, p. 5). After conducting searches in the pilot stage and general searches no similar project has been identified, justifying the initiation of this project from a traditional systematic review point of view. In this project the team of researchers in naturally limited to one PhD student, which may be a factor that may increase bias and error. However, as discussed, steps are taken to minimise bias and error by drawing on advice from a range of researchers and through the supervisors’ critical observation of every aspect of the project.

The next section describes the stages of the review and the methodology used to address the two first research objectives of the project. This will resemble what is called a review protocol in a systematic review and represent the first step after initiating the process of a systematic review (CRD 2009, p 6). A review protocol sets out the methods to be used in the review and gives strategies for each of the different steps of the review as the guidelines produced by the Centre for Reviews and Dissemination describes it this includes “Decisions about the review question, inclusion criteria, search strategy, study selection, data extraction, quality assessment, data synthesis and plans for dissemination should be addressed” (CRD 2009, p. 6). The review protocol is shaped making use of tools from SR, and where they deviate from these it explores why and what alternative approaches were taken.

Inclusion criteria

Inclusion criteria are used to guide which studies will be included in the review and which will be excluded. Some reviews base themselves on the hierarchy of evidence as discussed previously and include only studies using methodologies that are rated higher in the hierarchy, based on internal validity. In this project this will not be applied, as we are interested in including as many relevant studies as possible. I will, however, exclude studies not fulfilling quality criteria deemed essential as described in the quality appraisal part of the review protocol. One type of studies has been excluded a priori however, descriptive studies, as we are interested in understanding and explaining the attitudes rather than merely describing them (Oskamp, 1990, p. 4). This is in line with the realist synthesis focus on explanation. It is thus assumed that to contribute to the development of knowledge about the attitudes other methods needs to be applied. In practical terms, when judging which studies to include, it means that the studies need to make inferences and further analysis of data rather than merely describing it. This is not to say that descriptive studies do not have their place in research, as it may be important for example when exploring new areas and when little theory about relationships is present.

In the pilot the research question was to assess and identify current knowledge about attitudes to social welfare. The inclusion criteria used to guide which studies were broad to include as many studies as possible. During the pilot stages of this project I used *welfare* as a main search term understanding it in a broad and inclusive manner taking into account both ‘social protection’ and ‘well-being’ to allow the inclusion of a wider range of attitudes to welfare based on O’Brien & Penna’s (1999) discussion of the different aspects of the term. However, terms like well-being, quality of life and happiness, which are related to the ‘well-being’ dimension of welfare, resulted in a huge amount of items identified. The search results were too manifold, often not of relevance to social protection, welfare provision nor attitudes. In addition it meant severe repercussions for the time needed to complete the study, not only as it prolonged the search process and inclusion process but also adding time to analysis. It also became evident that these terms in themselves are ambiguous and their meaning a matter of wide discussion. As a result of these experiences and to make sure the size of the project is manageable the project focuses on social welfare related to services and benefits typically originated and driven by the state rather than well-being. In this way the object of attitudes studied, the welfare state, is still broad and can be defined as a “system of social and institutional relationships through which people secure or maintain their individual or collective welfare” (O’Brien & Penna, 1999, p.7). This way it is hoped to avoid the exclusion of attitudes that may prove important in terms of our understanding of welfare and welfare provision. One criterion that changed after the pilot was the choice in the main stage to include qualitative as well as quantitative studies. The change was made as no qualitative studies were found and thus, is not seen to increase endanger completion on time. Inclusion criteria 1 and 2 were changed from being attitudes to the welfare state to focus on support during the project. Criterion 3 was included to ensure inclusion only of studies dealing with welfare pressures as dealt with in the theory chapter. These changes were made due to time limitations, as a research synthesis of wider criteria would mean too many studies to be able to complete the project on time. Furthermore, an understanding of what happens, and what may explain support for welfare states in light of the pressures these are facing can be said to be crucial in our society today, where countries and politicians face tough challenges and a persistent economic recession. Based on the main objectives, categories identified in the literature review and information from the pilot the inclusion criteria for are as follows:

1. All studies need to be related to support for the welfare state and thus measured as attitudes, or beliefs, values, perceptions and stereotypes as discussed.
2. As discussed in the literature review support can be studied as:
   1. Support for redistribution, basic income, and equality, provide jobs to all, support for equity, need or equality.
   2. Support for spending on needy/poor, on the welfare state and on specific programmes.
   3. Support for the welfare state in general and specific programs taken to represent the welfare state (policy areas/specific benefits and services).
      1. Range and degree of welfare state legitimacy; “range regards the issue of whether government should or should not take up welfare responsibilities and in what range of policy areas. Degree concerns the issue of how much government should spend on welfare provision” (Van Oorschot, 2010).
3. All studies should deal with attitudes related to welfare pressures.
4. All studies need to cover the area of Europe and be about one or more European countries. Europe is defined as the EU plus Lichtenstein, Norway and Switzerland.
   1. Studies covering USA, Canada, Australia and New Zealand will only be included if they also cover a European country as defined in this project.
   2. If studies cover a European country and other areas they will only be included if these other areas are USA, Canada, Australia and New Zealand.
5. All studies should be cross-national, thus need to include two or more countries
6. Studies to have been published/written/presented from 1994 to end of 2010[[1]](#footnote-1).
7. Only studies written in English will be included because:
   1. The reviewer will not be able to read all other languages.
   2. The reviewer would only be able to include studies written in a few languages in the European regions, which would bias the study towards those countries.
   3. Studies written in English assumed to be the most influential in international literature
8. Unpublished/’Grey’ literature and published literature included
9. Qualitative cross-national and quantitative studies will be included, however, purely descriptive studies will not be included

Search strategy

Following the guidelines from the Centre for Reviews and Dissemination latest guidelines (2009) for doing systematic reviews the search terms will be guided by the main objective and the PICOS (population; intervention; comparator; outcomes; study design). This will help guide the development of search terms i.e. Population: studies about attitudes; Intervention: studies using data from social surveys; Comparator: other countries, other attitudes, attitudes at other points in time; Outcome: findings about tendencies; Study design: all but descriptive. An attitude is an umbrella term for an array of different sentiments, and beliefs, values and perceptions may also be part of studies about attitudes. Since this study originally aimed to assess knowledge about attitudes as a whole the search strategy involved searching for a range of terms describing attitudes and elements of attitudes such as beliefs, values, perceptions, orientations and stereotypes.

As can be seen in **Appendix 2** BOOLEAN strategies for searching are used to make sure by use of AND OR that all possible combinations of terms are included and searched. An example from guidelines produced for reviews conducted on behalf of Social Care institute for Excellence of use of BOOLEAN operators is “to search for items on the topic of day care for children with learning disability you might use the following: (terms for) children OR (other terms for) children AND (terms for) learning disability OR (other terms for) learning disability AND (terms for) day care OR (other terms for) day care” (Coren & Fisher, 2006 page 19). Further to the search strategies it is important to discuss some issues that might occur when using BOOLEAN search strategies in Social Science, one reason for this is the changing terminology in the Social Sciences (Gomersall and Grayson, 2003). In this study this is partly controlled for by consulting a variety of academics when constructing the search strategies. As the topics covered by the search terms for this study is wide this danger would have been higher than in a more specific review question. To inform the search terms the reviewer got input from researchers within the areas of Economics, History, Politics, Sociology, Criminology, Anthropology, Social Policy and Psychology at the University of Kent as well as from authors of the studies included for the pilot to ensure that the search terms encompass the widest possible range of attitudes and to minimise bias. The strategies have not been limited during the studies as the decision to limit the scope of the research was made during the searches and thus it was decided to stick with the original strategy so as not to incur bias.

As mentioned a pilot was carried out, and proved very important in guiding the choice of databases and sources to search in the main stage. In the pilot two major databases were searched; ISI Web of Knowledge (WOK) and IBSS (between 17/11-09 and 17/12-09). Overall the items found in IBSS were more relevant even though fewer hits were made. There was some overlap between included items on IBSS and WOK, even though more items were found on WOK. This means that one might need to use the WOK with care, choose only the areas and databases not covered by other databases to save time wasted going through non-relevant hits. On the other hand the lack of complementarity between these major, databases is an important finding in itself, not only for this study, but for all researchers searching databases and points to the importance of searching more than one database to acquire better coverage of a field. It is also important to be aware of country bias that databases may have. Gomersall and Grayson (2003) warn about the bias towards American literature in many of the major databases such as WOK, and this was an issue that was also found in this pilot when searching WOK as more USA based journals are covered.

The list of databases to search was produced based on experiences from the pilot, in cooperation with Alan Gomersall and Chris Cooper at the Centre for evidence and policy, literature in the areas, through discussions with the supervisor as well as through the library website at the University of Kent please **see Appendix 1**. The choice of databases is driven by a focus on a wide geographical- and cross-disciplinary coverage as well as a focus on welfare state relevant sources. Furthermore, to ensure books are included Oxford University Press, Cambridge University press, Sage and Google books was searched. Unpublished material as well as research and conference papers- so called grey literature will be covered through searches of widely accessible search engines such as Google as well as by searching databases including grey literature. ‘Grey’ literature is important to cover as the results of the knowledge produced might be otherwise biased towards published knowledge. It is also important to start with wide-ranging databases as attitudes can be studied across many different subject fields. An iterative approach was taken with the identification of information sources, as with the identification of search terms and new sources were added as they were found. To comply with the principle of maintaining a transparent research process all information sources used as well as search strategies used are documented.

Study selection

There are usually 2 phases of the study selection in systematic reviews and these are: 1) initial screening based on the headline and/or abstracts and 2) full versions of the studies that go through the first initial screening are sought and screened against the inclusion criteria (CRD 2009, p 13). The screening process will be documented with number of studies found initially, inclusions and exclusions and why at each stage. In the pilot 24 studies where chosen randomly after the 2 screening stages due to time constraints and for the main stage a limit of 300 studies was set preliminary, however, was not used. It is also important to highlight here that an additional search in Cambridge, Oxford and Sage publishers’ databases to address database bias as some journals may not be included in the bigger databases as well as to ensure inclusion of books.

Separating the wheat from the chaff: the main stage

As per the more traditional systematic review approach, quality will be critically appraised after the 2nd stage of the screening, and again it should be highlighted that this is a matter of applying personal judgement combined with fundamental methodological criteria. The study overall assumes that the majority of work discussed is peer-reviewed and subjected to quality appraisals and thus should have an acceptable methodological standard. However, it is argued that the quality of studies still will vary and a critical appraisal is needed. Some authors in the systematic review tradition rate quality of studies not only for the quality of the particular study, but also give higher importance to studies higher up in the hierarchy of evidence. Here this will not be the case as the aim is to map what we know and don’t know in the area. Studies may however be excluded if they do not fulfil the criteria rated as essential for a study. Quality appraisal is traditionally conducted to avoid incurring bias of single studies and incorporate them into the systematic review (Petticrew & Roberts, 2006) but also with an aim to provide an analysis of common quality issues found in the area. With studies identified as weak the project will also include an appraisal at time of analysis to test and build on a realist synthesis approach. The issues found through the quality appraisal will be discussed in the following chapter, and a particular focus will be made on quality issues found in the area of immigration as an illustration of issues founds across welfare pressures.

The approach to quality appraisal in this thesis takes two separate, but intrinsically linked forms. On the one hand the project explores Pawson’s (Pawson et al., 2004) argument that adoptions of quality criteria based on a horses-for-courses approach, adapted to the methodologies reviewed. To assess the multitude of methodologies found in the area without giving preference to methods such as RCT we use an adapted list of quality criteria building on Wallace et al. (2006). Pawson highlights six difficulties related to these kinds of adaptations; boundless standards making the criteria to many, abstract standards making it difficult to judge, conflicting standards, permissive standards, composite standards where one needs to judge which criterion is more important and lastly pick-and-mix standards raising a question on whether it is parts of a study that should be judged rather than a study as a whole (Pawson, 2003). The findings in the thesis confirm the above-mentioned difficulties.

Alongside a broadening of traditional systematic review approaches to quality appraisal, the thesis is taking Pawson’s approach to quality assessment seriously, and include a critical discussion and use of what may be learnt from ‘bad research’. Pawson argues that quality should be assessed; however, it should be done differently than currently argued in the systematic review tradition. He argues that “Bad’ research may yield ‘good’ evidence - but only if the reviewer follows an approach which involves *analysis-and-appraisal”* (Pawson, 2006, p. 2). The question then becomes how do we identify good evidence in bad research in a defensible and reasoned manner? To answer this question Pawson emphasises explanation, generation and iteration and makes use of a quality appraisal that takes place at the time of synthesis (Pawson, 2003, p. 2). Thus, Pawson argues that quality of a study only can be assessed at the point of analysis; furthermore he focuses on an inspection of each part of the study and argues that some parts of a whole can be used even though other parts of the study do not meet the quality standards used. The latter is because as “the synthetic product is never going to be composed holistically then the full-kit inspections of each component study is not only unwieldy, but also quite unnecessary” (Pawson, 2006, p.8). His criteria are relevance and rigour in the appraisal of quality instead of a longer list of criteria as the one presented in table 3.2. Furthermore, he emphasises three crucial steps; assessing the fitness-for-explanatory-purpose, assess whether “the inference made in a study gels with those from other studies?”, and lastly does the study contribute towards the developing explanation (Pawson, 2006, p.8). In other words, as mentioned already, studies are assessed on whether they contribute to and help develop an argument in a methodologically sound way. Furthermore, and importantly, the review process is iterative and generative as what the explanation and focus is changes during the review process, thus quality criteria changes. The two guiding principles in quality appraisal for Pawson, relevance and rigour, are defined as:

*“(a) Relevance – as discussed in Section 2.1, relevance in realist review is not about whether the study covered a particular topic, but whether it addressed the theory under test.*

*(b) Rigour – that is, whether a particular inference drawn by the original researcher has sufficient weight to make a methodologically credible contribution to the test of a particular intervention theory”.* (Pawson et al., 2004, p. 22)

The evaluation of the above is important, in particular as it may seem that it may suffer from a weakness identified by Pawson himself in those approaches adopting a wide range of quality criteria; operating with abstract concepts that may be difficult to apply in a systematic manner. In other words is the difference when quality appraisal occur, during synthesis and analysis, rather than the how? As a preliminary defence of his stance, it can be said that the appraisal of parts or some of the inferences within studies related to the review’s developing explanation might help the process become less abstract. This is because at the point of analysis it will be clearer to the reviewer what the different studies argues and find, and thus what elements and explanations seem to fit with each other and which may be more or less defensible from both a theoretical and methodological point of view.

As mentioned the thesis aims to assess this approach, as well as the extended quality criteria developed by those remaining closer to the traditional systematic review tradition as ways in which one can separate the wheat from the chaff. In particular, the project focuses on how this can be done when ‘bad’ evidence is included and no hierarchy of evidence is used. It is argued that it is thus important to understand what approach may be more helpful when conducting a review in Social Policy, as it is an area where a multitude of methods and theories are used. Furthermore, the multitude of methods and approaches in the area highlights an importance to know what may be ‘good quality’, and what may help us create stronger theories and explanations.

The quality criteria used in the project is based on criteria used by Wallace et al.. (2006) in the area of housing as it is important to show sensitivity to the fact that studies included may use different types of methodology, which is taken into account in their criteria. Their focus is in line with, a horses-for-courses approach where criteria are adapted to methodologies used in the area under review. Petticrew & Roberts (2006) argues that “care should be taken when using ‘off-the-shelf’ critical appraisal tools, because they may have originally been designed for use with clinical interventions, and may encourage inappropriate criticism of evaluations of social interventions” (Petticrew & Roberts, 2006, p. 128).

It is not expected to be easy to apply a quality appraisal tool due to the variety of questions asked in the studies included. This represents a different setting for quality appraisal than for more conventional systematic review where effectiveness of interventions is assessed. In addition more traditional systematic review not only judge the quality of methodology based on the research question in a specific study but in terms of its relevance to the review question (Bambra, 2009). The latter underlines a need for a different appraisal in this project as it operates with a broad question where a variety of methods and designs may be used. In addition a variety of disciplines and topics are covered which have different academic conventions in terms of reporting as well as approaches to a research problem. If or when studies are excluded based on quality a short report on the grounds will be produced. Even though quality is assessed and may be a reason for exclusion in this project it is also important to underline the continuous importance of judgement rather than replication as quality appraisal demands scrutiny and analysis. Wallace et al. (2006) discussing critique made by Pawson underlines his argument that “reviewers should just ‘cut to the judgement’ and that studies should be judged against their relevance not just to the topic” (Wallace et al., 2006). In this project we agree with the importance of judgement and emphasis on methodology and findings, and will as argued include tools from realist synthesis to separate the wheat from the chaff when it comes to quality.

The list of quality criteria, table 3.2, which will be used in this project, is based on a model found in Wallace et.al’ (2006), questions highlighted in yellow are those which were added to the original model. This list is pragmatic and wide and rather than using quality appraisal scales for each of the methods it aims to answer fundamental questions applicable to any research project. In difference from Wallace et al.’s (2006) criteria additional questions around sampling are included due to the high use of surveys in the area of attitudes requiring a closer examination of this aspect in a quality appraisal. The same reason drives the inclusion of criteria specifically questioning operationalization, as cross-national studies need to address different cultural understandings of concepts, which creates a need for this to be addressed in studies. Furthermore due to the use of international surveys there is a tendency to create indices and scales, often using factor analysis, which again leads to a need to scrutinise the quality of these. In addition questions used in Spencer et al.. (2003) are added to item 9 and 10. In terms of item 10 Stinchcombe’s (1968) seven levels of generality will be used to ensure that a study does not draw conclusions and generalisation it cannot do based on its data, analysis and research questions.

## Table 3.2 Quality criteria

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | Question | Is the research question clear? | E |
| 2 | Theoretical perspective | Is the theoretical or ideological perspective of the author (or funder) explicit, and has this influenced the study design, methods or research findings? | D |
| 3 | Study design | Is the study design appropriate to answer the question?  Are limitations discussed/mentioned? | E |
| 4 | Context | Is the context or setting adequately described? |  |
| 5 | Sampling qualitative | Is the sample adequate to explore the range of subjects and settings, and has it been drawn from an appropriate population? | E |
|  | Sampling quantitative | Is the sample size adequate for the analysis used and has it been drawn from an appropriate population?  Discussion of how sample is elected?  Discussion of value of scales and indices included?  Were there issues such as use of factor based indexes which means that sample is reduced and is not valid for the whole population discussed? | E |
| 6 | Operationalization & Internal validity | Operationalization of research questions and concept. Have they ensured low level of ambiguity, closeness to concepts etc?  Has survey or study conducted checks to make sure that people understood what was meant by the WS or checks to ensure that concepts are used consistently? | E |
| 7 | Data collection | Was the data collection adequately described and rigorously conducted to ensure confidence in the findings? | E |
| 8 | Data analysis | Was there evidence that the data analysis was rigorously conducted to ensure confidence and credibility in the findings?  Does operationalized/statistical/theoretical model include all the variables in the model or are some missing? | E |
| 9 | Reflexivity | Are the findings substantiated by the data and has consideration been given to any limitations of the methods or data that may have affected the results? How well does the evaluation address its original aims and purpose? (From Spencer et.al, 2003: 9-10) | D |
| 10 | Generalizability | Do any claims to generalizability follow logically, theoretically and statistically from the data?  For what population or groups of the population?  Does the study draw conclusions based on another level of generality than what the study design allows?  Discussion about how findings relate to wider theory, evidence to support wider claims? (Spencer et.al, 2003) | D |
| 11 | Ethics | Have ethical issues been addressed and confidentiality respected? | D\* |
| E = essential. | | | |
| D = desirable. | | | |
| \*Ethics may be essential in other sensitive fields. | | | |

As a quality appraisal and exclusion based on quality will be part of the main project we will be able to assess the robustness of the synthesis, and more specifically the robustness and strength of the included articles. This will be addressed in the quality appraisal and overall findings where the data synthesis is carried out where an on-going discussion of the limitations of the study will be included throughout.

Data extraction

At the same time as conducting the quality appraisal of the studies data will be extracted from the studies. The literature review part of this report highlighted a theoretical framework that will be used as categories for data extraction where a sheet will be created outlining the information that should be extracted from the studies. Below are data to be extracted based on what was found to be useful in the pilot as well as the literature review. This data can be said to be on different levels i.e. author, title and year versus findings and school of thought and will be treated as such in the analysis.

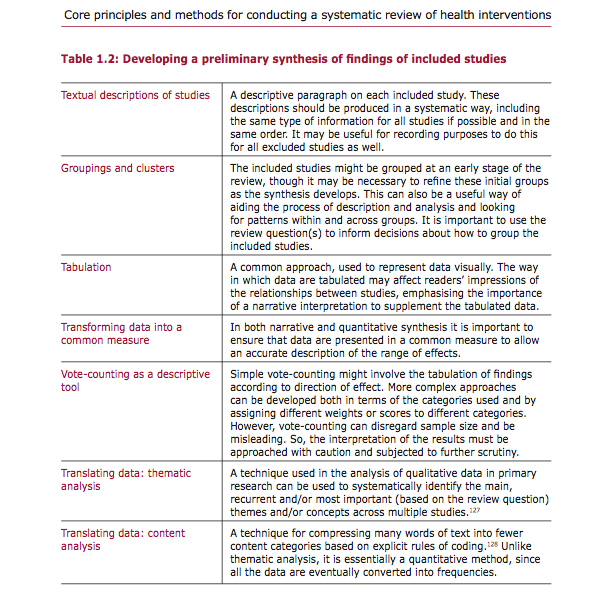
* Author & year
* Name of study
* Survey used/data source
* Year the survey took place- or which year’s survey data is being used in the study
* Published/unpublished
* Countries included
* Research question/objectives of study
* Support outcome variable, dependent and independent variables used
* What welfare states do – according to the study
* Category of welfare pressure
* Methodology used
* Discipline
* Main findings of the study
* Levels of generality
* Type of support based on Easton’s definition
* Effects, effect sizes of dependent and independent variable but also 1 and 0 for each of the ones that have an effect- and maybe value positive or negative regarding what effect they have

Data synthesis and analysis

A finding from the thesis is that to be able to achieve a systematic approach to the research synthesis it is important, as advocated by realist synthesis, to have theoretical framework to systematise evidence. This enables us to build patterns of explanations where each study adds another layer to an explanation. Further to this, and similar to the criticised accumulation of findings carried out in traditional systematic reviews, this project values heterogeneity and refutation at the moment of synthesis. As a result, the study again positions itself at a middle ground by using tools from systematic review but adapting them to achieve a comprehensive review of a diverse area where findings from individual studies may falsify each other.

In a traditional systematic review one may make use of different synthesis approaches. As argued earlier these methods have a focus on accumulating findings rather than critically assessing them relative to their explanations and findings. The latter valued by Popper (e.g. 1963) as crucial in scientific research. Synthesis in a traditional systematic review approach can be defined by “Synthesis involves the collation, combination and summary of the findings of individual studies included in the systematic review. Synthesis can be done quantitatively using formal statistical techniques such as meta-analysis, or if formal pooling of results  
is inappropriate, through a narrative approach” (CRD, 2009, p. 45).

## Figure 3.1 CRD (2009, p. 51).



In a narrative approach to review used in more traditional systematic review the methods in the above figure are often used, albeit always emphasising synthesis that is not valuing heterogeneity, competing explanations nor falsification. As can be seen these focus on reducing the information to achieve clear answers, and is an approach where homogeneity amongst studies is valued as opposed to heterogeneity. These approaches may be argued to be too simplistic to achieve a comprehensive review of a diverse academic area, and may lead the researcher to overlook valuable and crucial information from studies. As a result this study will make use of the quite broad theoretical framework discussed in the previous chapter, and will build on the variety of explanatory approaches to explore the heterogeneity and explanatory power of the different approaches. This is done to appreciate the complexity and diversity of findings, and to give due importance to these.

Due to the broad research objective, traditional systematic review quantitative methods such as meta-analysis have proven difficult to use. Meta-analysis is defined as “a set of statistical methods for combining quantitative results from multiple studies to produce an overall summary of empirical knowledge on a given topic” (Littell et al.., 2008, p. 1). Meta-analysis involves calculating effect sizes which “is a measure of the strength (magnitude) and direction of a relationship between variables” (Littell et al., 2008, p. 80). The reason for meta-analysis being difficult to use here, is that the studies include slightly different questions and outcomes, and more importantly different methods. The latter makes it very difficult to calculate comparable effect sizes.[[2]](#footnote-2) These, together with the fundamentally exploratory nature of this study, are the reasons why no one specific analysis methodology has been chosen.

The aim in the synthesis stage of the thesis is to explore possible ways of synthesising the evidence when conducting a review in this area, as more traditional meta-analysis and synthesis proved difficult. To help the creation of categories the data will be analysed and synthesised thematically, building on the theoretical framework outlined in the theory chapter. The CRD guidelines for narrative data synthesis contain four elements of narrative synthesis; developing a theory of how the intervention works, why and for whom, developing a preliminary synthesis of findings of included studies, exploring relationships within and between studies and lastly assessing the robustness of the synthesis (CRD, 2009, p. 48). Each of the elements have various tools and techniques to help assist the synthesis and both elements and tools will be adapted and applied where and when it fits the purpose of assessing theories and knowledge produced in the area of attitudes. After the initial systematisation of the findings other analysis methods will be used. All of these will appreciate the heterogeneity of the area, and build on the theoretical framework discussed in the theoretical chapter.

Another possible analysis method is to use qualitative comparative analysis (QCA), a methodology which positions itself between qualitative ‘case-oriented’ methodologies and quantitative ‘variable- oriented’ methodologies. According to Ragin (1989) it enables “..the identification of different causal conjunctures provides a basis for delineating types and subtypes of social phenomena. Specifying types, in turn, establishes a necessary bridge between the diversity that exists in a given category of historical outcomes and social scientists’ attempts to produce theoretically relevant generalizations about events and processes around them” (Ragin, 1989, p. 168). In other words it might be able to trace trajectories and ownership of certain characteristics through use of QCA to help trace and establish what explanations are found, and what effects are identified across the different studies. Meta-regression is another possibility, basing effect size calculations on regression coefficients. However, as we will see in the findings chapter a range of methods, (multilevel modelling, probit regression, logit regression, OLS regression and bivariate analyses) are used making calculations less meaningful as few studies can be added and used as a basis for each type of meta-analysis, and thus rendering the synthesis less useful.

The approach to research synthesis applied in this thesis builds not only on realist synthesis, but also arguments put forward amongst others by Sandelowski et al. (2007) who argues that one needs to synthesise topical differences as well as methodological differences in research synthesis. In other words, differences between theoretical approaches and studies should be appreciated, rather than homogeneity across studies, which is what is seen as valuable in systematic review and specifically meta-analysis. As a result meta-analysis is argued here to be problematic in a diverse scientific area such as Social Policy where different approaches and explanations may shed light on different parts of a phenomenon.

The issue of difference is in systematic review traditions often referred to as the ‘apples and oranges’ problem (Sandelowski et al., 2007), in particular important in meta-analysis, and is an issue were one needs to decide “whether they will treat two entities (e.g. apples and oranges) as one entity (fruit) or preserve the distinctions between them” (Sandelowski et al., 2007, p. 7). As in Sandelwoski et al. (2007), this thesis needs to address and deal with the issue of a diverse range of methods used in the included studies. They argue in favour three strategies to be used when synthesising mixed method research; integrative, segregative and contingent. As in realist synthesis, here the two approaches will be treated as complementary, arguing for an approach where we add findings to each other and answer the key question of whether findings refute or complement each other. Furthermore, the project subscribes to their approach and will assume that findings that refute each other means they can be integrated into each other through refutation or confirmation, whilst if their findings and focus complement each other they will be seen as different, and segregative. A contingent synthesis means that the findings of one study lead to another research question that can be answered by a second study etc. (Sandelwoski et al., 2007).

To synthesise findings, the thesis builds on the work of Onwuegbuzie (2003), who describes processes one can use to calculate effect sizes based on systematic reviews of qualitative studies. These are strategies that will be used also in this project as it enables findings from studies to be compared and related to each other through for example percentages that find effect of a variable such as gender on a variable such as redistribution. In other words one can code findings as having for example gender having a positive effect of a specific measure of support for the welfare state by giving it the value 1, and thus calculate how many studies find a positive effect of gender on that welfare support measure. This is building directly on Onwuegbuzie (2003), who gives studies a value (0 or 1) based on the existence or not of a topic/finding of effect or not of a characteristic if studies have same dependent variable. This enables the production of a matrix within and across studies within a topic of themes/variables covered and effects. Thus the proposed method enables us to identify themes and effects found in the studies, to compare these, represent them with percentages and also to embark on co-relational studies of these (Onwuegbuzie, 2003, p. 402). In the findings chapter it will be illustrated how these kinds of synthesis approaches may be used in combination with the use of a theoretical framework to appreciate the heterogeneity of studies in an area such as support for the welfare state.

**Conclusion**

Overall, the thesis argues that tools from systematic review can be used successfully if the particular features of the Social Sciences are taken into account. This positions it in the middle ground between the promoters and critics of traditional systematic reviews. The project subscribes to a logic of inquiry where explanation is valued as is iteration and where it is argued that “’facts do not speak for themselves’ and are always explained within a particular theoretical framework” (Powell &Hewitt, 2008, p. 5). As seen throughout, systematic review has been a research approach that has seen a growth in importance and usage the last decades, and one which has expanded beyond its original usage in health, medicine and natural sciences. This necessitates an assessment of its strengths and weaknesses when applied in other areas such as Social Policy, and this thesis makes use of tools from the tradition as well as the realist synthesis tradition to assess how review methods may be successfully applied and made use of in the area of support for the welfare state. As illustrated in this chapter, the thesis takes a middle ground, and does not adhere to all principles of systematic review, nor is it a pure systematic review, for reasons discussed in the chapter such as diversity in methodological approaches and theories making it important to appreciate heterogeneity. It is also argued that falsification within a review is important. Findings from one study may refute findings from a series of other studies. This is point distinguishes this project from other reviews which tend to emphasise refutation when comparing the full findings of a review with those of other studies and reviews. Further discussion of the different analysis methods carried will be done as part of the overall finding and analysis stage as part of the findings are an exploration of the different strengths and weaknesses of the different approaches.

# Chapter 4. Quality appraisal: Separating ‘bad’ quality research from ‘good’ quality research

**Introduction**

As highlighted in the discussion in the methods chapter, quality appraisals form a fundamental part of a traditional systematic review (see for example CRD, 2009). Yet, it is also one of the areas where the systematic review tradition has received more criticism. This is in part due to traditional systematic review approaches giving more value and importance to some methodologies than others. However, other approaches, such as the Realist Synthesis approach, criticise more fundamental aspects of the quality appraisal. Rather than assessing a study’s quality, and excluding it based on pre-set criteria, this method focuses on whether studies, and more particularly inferences made within studies, can add to the explanation that the synthesis is developing, forming and challenging (see e.g. Pawson, 2004).

As discussed in the methods chapter the aim of this thesis is twofold. On the one hand it utilises an adapted approach, changing some of the more stringent systematic review criteria, which has been the response by the systematic review tradition to criticism. This approach entails widening quality criteria to be able to assess a multitude of methods, and on the other to make use of approaches to quality promoted by Pawson and other realists. To achieve the first aim the study uses the quality criteria created by Wallace et al.. (2006) as it is a Social Policy review that also assesses a wide range of methods, as does this study. Some elements have been added to their criteria to ensure methodological issues pertinent and unique to the area of welfare attitudes are properly assessed. The criteria are designed to appreciate the heterogeneity that characterises both methods and theory in the area of welfare attitude studies. This chapter will focus on assessing quality using these criteria.

**Approaches taken**

The thesis takes Pawson’s approach to quality assessment seriously, and includes a critical discussion and use of it. Pawson argues that quality should be assessed differently than currently argued in the systematic review tradition. As we do not operate with a hierarchy of evidence, the thesis needs a way to approach and separate the wheat from the chaff when it comes to ‘bad’ quality studies. Pawson’s approach is argued to be able to do so. He argues that “Bad’ research may yield ‘good’ evidence - but only if the reviewer follows an approach which involves *analysis-and-appraisal”* (Pawson, 2006, p. 2). The question then becomes; how do we identify these nuggets in a defensible and reasoned manner? As discussed in the methods chapter, the approach emphasises explanation, generation and iteration and makes use of a quality appraisal that takes place at the time of synthesis and analysis (Pawson, 2006) Thus, the argument is that the quality of a study only can be assessed at the point of analysis.

Pawson focuses on inference as a unit that should be subjected to quality assessment rather than the study itself. The latter is based on the reasoning that since “the synthetic product is never going to be composed holistically then the full-kit inspections of each component study is not only unwieldy, but also quite unnecessary” (Pawson, 2006, p.8). This is because which explanations are important for the review will change during the review process, and sometimes parts rather than focusing on the full study individual inferences is what can contribute to the emerging explanation. An example of the approach is found in Pawson (2006). There he finds that whilst parts of a study on mentoring are poorly conducted and doesn’t give or add to explanations, another part of the same study gives valuable understanding of a sequence of mechanisms in mentoring processes (Pawson, 2006, p. 12). The latter is deemed valuable by use of the criteria of rigour and relevance discussed in the methods chapter, and in adding to the patterns of explanations built in the review in question. However, as already agued this study will also make use of an extended quality criteria building on Wallace et al. (2006). This is because these are seen as valuable to test the adapted systematic review approach.

To achieve the two aims of the quality appraisal of this study, the project made use of quality criteria based on Wallace et al. (2006), which widens criteria and adapts to criticism made of traditional systematic review approaches. The studies were rated at the point of the data extraction using the list of criteria presented in the methods chapter. This study is untraditional in its approach to systematic review as it does not apply weights to studies’ findings according to their scoring in the quality appraisal, as some systematic reviews do (see CRD, 2009) where some studies are given higher importance than others. That approach stems from a belief in learning from weaknesses of studies. To achieve this ‘weaker’ studies that were identified and the inclusion of studies were assessed in terms of their relevance and rigour in answering the question at hand at the point of analysis. As a matter of fact, a finding of the study is that the appraise–and-analyse approach occurs naturally. This is because one, when assessing and including studies at the point of data extraction and quality, will go back to the research question and theoretical framework developed in a manner very much like that of a realist synthesis approach. Thus, a finding of the study is that the iterative process of going back and forth, fundamental to a realist synthesis approach, occurs even when a review protocol is included. Furthermore, the appraisal of studies found that findings and quality are so intrinsically linked that it is difficult to assess quality separately from studies’ findings. As a result the thesis argues that an encompassing approach where studies are critically assessed and discussed, and related back to the theoretical framework, research question and explanation is fruitful in answering the research question of the study, to map what knowledge exists.

Following the approach, the quality criteria have also been created with a focus on the aim of being adapted to the type of studies one expects to find (Petticrew & Roberts, 2006). Moreover, it is argued that whilst an appraisal of quality is important to highlight weaknesses and strengths of the quality of research in an area, an emphasis on methodological rigour should be combined with a focus on what can be learnt from ‘bad’ research and its findings. The latter is in line with a realist synthesis approach. It is argued that a rigorous quality appraisal demands continuous scrutiny and analysis rather than using a stringent and uniform inclusion/ exclusion approach when carried out in the diverse setting of Social Policy. This is in line with Wallace et al. (2006), who underline that “reviewers should just ‘cut to the judgement’ and that studies should be judged against their relevance not just to the topic” (Wallace et al.., 2006) or method used. In addition, a realist synthesis process requires iteration and appraisal that is closely connected to theory and explanation. This project subscribes to both of these arguments. As discussed in the methods chapter, studies not fulfilling the essential criteria are excluded, and the explanation for exclusion and possible lessons learnt from excluded items will is included. As a result the approach taken in the quality appraisal was a multi-step process:

1. Exclude some studies on pre-defined methodological grounds;
2. Review remaining studies relative to their findings and how they can add to the explanations the review is developing to identify what can be demonstrated by weaker studies despite methodological weakness;
3. Use that material together with methodological rigorous studies.

This chapter will report on step 1, whilst steps 2 and 3 will be included in the research synthesis where the identified findings and explanatory patterns are discussed.

**Quality issues found across studies**

When assessing the studies using the extended quality criteria it is found that studies, overall, in this area can be said to be of satisfactory quality, and no studies have been excluded. This is to be expected as most studies have been published in peer-reviewed journals. However, there are some overall weaknesses identified, which in particular applies to articles. The latter may be due to articles having less space to discuss the methods used and justify choices made, and confirms findings in Wallace et al. (2006) and Sundberg and Taylor-Gooby (2013). In the pilot stage of this study the following four points were highlighted (discussed in Sundberg & Taylor-Gooby, 2013).

* Not all articles display all methods or results of calculations making it difficult to evaluate quality.
* Researchers are at the mercy of standardised questions to measure certain attitudes. This results in studies using the same measures to understand different aspects of welfare attitudes.
* The development and increasing use of advanced methods such as multi-level modelling and SEM has not been followed by a consensus in how to report findings in studies making use of these methods.
* Not all studies justify their choice of countries which, as will be pointed out, is particularly problematic in comparative studies where we are interested in understanding why attitudes may vary from one area or country to another.

Regarding the first point there are different styles and standards for writing articles in different disciplines, complicating the quality appraisal in this particular review as this study includes resources from a range of disciplines. The included studies differ, some include more information than others when explaining the methodological and theoretical approaches taken, and above all they differ in terms of how methods and results are reported, i.e. what is displayed and what is not when for example creating a new variable. One pragmatic solution to the issue, used here, is to deem a study acceptable as long as the considerations taken are clear, and the reasoning behind the model and findings are clearly explained. In other words, whether the study has carried out rigours research that can answer its research question. One piece of information that is often missing is information about and discussion of the sample used. This is assumed to be because most studies use big, cross-national surveys, which are deemed to have sufficiently big samples as well as procedures in place. However, it is still important to include as it can impact the validity of a study, and should be critically discussed and included in all studies.

As for the second point one could argue that little can be done to change the measurements of existing cross-national surveys. One solution is of course to win bids to carry out the rotating modules of surveys such as the European Social Survey (as in HumVII and ESS 2008). However, as this is very competitive, researchers try to deal with this issue in different ways; many create indices encompassing various measurements to achieve better measurements of their theoretical concepts, others carry out primary cross-national surveys. Creating scales and indices brings with it another set of methodological issues that will be discussed below. However, the limitations of a finite number of comparable, cross-national surveys available are an issue all researchers are aware of. From a quality point one point of view one can argue that it is acceptable as long as the constraints and possible impacts of this have been discussed. However, this thesis argues that scholars do not tend to discuss this critically, albeit with a few exceptions (e.g. Edlund, 1999). This is crucial as the indicators and variables at both on macro and micro level used to represent theoretical concepts impact studies’ findings. The latter will be explored at length and illustrated through discussions of the operationalization of redistribution and immigration.

The third consideration highlighted is interesting from a hierarchy of evidence point of view, as some authors might want to rank studies using multilevel models at the top of the hierarchy of evidence. This is because they can capture between and within country differences in attitudes not captured by other analysis methods. However, most scholars that do not use this method demonstrate awareness of the methodological issues involved when using different level (country and individual) variables. The latter is deemed as acceptable quality-wise, in particular as it is argued in this thesis that the choice of method should be guided by the research questions and needs. It is also important to note that multilevel modelling itself has weaknesses, in particular as the number of countries most commonly included are lower than what multilevel models require. The exact minimum number of higher-level units i.e. countries, is debated but Blekesaune and Quadagno (2003) suggest that ‘Standard methodologies assume that we have a large number of nations, 30 or more’ (2003, p. 419). However, they later use a sampling method that enables them to justify a lower number, 24 countries. Others argue that a minimum of 20 is justifiable.

This is a significant problem for studies of attitudes to welfare as there might be little comparable data for 20 or more countries. As a result, multilevel modelling should not always be used, and this thesis maintains the argument that no method can be rated as at the top of a hierarchy. This view is embedded in the argument that each type of statistical and methodological techniques has their weaknesses and this goes for multilevel analysis as well as OLS regression. A separate issue in regards to multi-level modelling is how authors should report results from multilevel models. Some display coefficients, fixed and random variance and model fit through -2Loglikelihood (Van Oorschot and Uunk 2007) or ICC, whilst others do not report the model fit (Andersen and Singer 2008). This might be due to the fact that multilevel modelling is a relatively new method and no convention has come into place, but the choice on which parameters to include might be something authors should discuss in articles, at least until a convention has come into place. No consensus seems to have been reached on this based on the reporting found in the included studies in this project.

In regards to the statistical issues related to multilevel modelling, Jæger (2006) argues that two assumptions are often violated making the use of this model problematic. Firstly, “that the random effect accounting for unobserved between-country variables takes a known parametric form, typically the normal distribution. Since nothing is usually known about the nature of the unobserved between-country effect, the choice of the normal distribution is entirely arbitrary.”(Jæger, 2006, p. 165). Secondly, and more problematically for this area; “the random effect is assumed not to be correlated with any of the level 2 explanatory variables. In effect, this assumption implies that the regime type indicators are hypothesized not to be correlated with *all* aspects of welfare regimes not captured by the model” (ibid). In addition to these criticisms by Jæger (2006), Svallfors (2010) also questions the use of multilevel modelling and warns that it may lead to a *“‘*wild goose chase’ at the country level, if and when effects of macro‐variables are only the reflection of omitted individual‐level variables. Another unfortunate side‐effect is that analysts often assume a linear additive model in the relationship between various macro‐level factors”(Svallfors, 2010, p. 248). These issues are not issues scholars discuss in the included studies. They need further critical discussion. The findings also underline the importance of critical discussion of choice of methodology, and supports and argument that there is no one gold standard method.

Fourth and lastly, many studies fail to discuss their choice of countries. This is problematic as the choice of countries can induce a selection bias and impact the findings. It is particularly problematic when the researcher wishes to use the countries chosen as examples of different welfare regime types and wants to make conclusions about attitudes within specific regimes. It is particularly problematic because there is disagreement around which countries fit into which category, and the choices made have an impact on findings. An example of a country about which there exists disagreement is the Netherlands, which sometimes is categorised as a social-democratic type of welfare state whilst others argue it is a conservative welfare state regime (e.g. Gelissen, 2001 categorises it as social democratic, whilst Jæger, 2007 doesn’t). Another issue that is problematic for studies is that the differences between countries within a typology might be bigger than the differences across typologies and this is very important to discuss (Svallfors, 2003). This is particularly important in relation to support for the welfare state as one school of thought argues that institutions will impact attitudes, and thus a critical discussion of the institutional setting in which these effects are argued to occur is crucial. As a result choosing more than one country from each typology is important, and studies also need to critically discuss these issues. Further problems with this will be discussed below.

An additional critique, related to the choice of countries, which has not been discussed at much, or any, length in the studies analysed, is the fact that there might be a convergence amongst the public in the different countries. In particular, one could expect that this may have some explanatory power in European countries that are part of the EU in terms of attitudes related to similar welfare pressures. This could mean that only analysing European countries might give results that are different than if we include countries with established welfare states outside of Europe. To a certain extent this study also suffers from this in the sense that the major focus of this study is on European countries. However, this is an issue the researcher is aware of, and it may be justified by the aim for this study, which is to map what we know about attitudes to Social Policy in these areas, including an interest in exploring whether there is convergence.

Discussion of sample sizes and populations of studies is another area where a lack of transparency in reporting as well as critical discussion is found. Books, with their space advantage, seem to identify sample sizes to a greater extent (e.g. Crepaz, 2008). However in books where chapters are written more in article style, e.g. Mau & Veghte (2008) the same lack of discussion of samples was found. This may be due to the fact that each of the chapters is quite different and thus the book does not have the space advantage of a monograph. In other words as the frequency of these types of books increases compared to monographs, we can expect the quality issues of articles to apply to books to an increasing degree. However, it may still be so that in books authors have more space and time to deal with methodological issues, build their arguments and apply different types of methods. As a result one could come to the conclusion that the quality of methodology of books is better than that of studies covered by articles. To highlight that the surveys used are based on representative samples for each nation is not enough when the sample for a specific question in a study might be quite different from the full sample, and also if the author focuses on a specific part of the sample such as the unemployed.

**Quality issues within the area of immigration and welfare state support**

The following will focus in particular on studies from the area of immigration as an illustration of the quality issues found across welfare pressures and support for the welfare state measurements. The weaknesses found here were found across all welfare pressures and areas of support for the welfare state. This in-depth analysis into one area enables the project to explore these in greater detail than that possible if it was to focus on more areas or measures. Quality issues related to operationalization will be explored for both redistribution and immigration in later chapters. These general weaknesses also underline Pawson’s (2004) argument that quality criteria do not necessarily provide clear cut answers to what studies are ‘good’ and ‘bad’. They are in many ways a messy but useful characteristic when dealing with diverse areas such as this. Messy, because the diversity makes it difficult to go further than overall conclusions and more superficial discussions of quality. Useful, as they do provide evidence of important quality issues that should be taken serious. The following focuses on immigration, this is an area that is seen as an important factor that may influence support for the welfare state by many scholars (e.g. Alesina & Glaeser, 2004; Mau & Burkhardt, 2009; Van Oorschot, 2008). In the UK it has recently become a very hot topic as the social rights of Bulgarians and Romanians are discussed by politicians, media and addressed in surveys. An example of the extent and intensity of the topic during the first half of 2013 in the UK can be found in BBC’s especially created Q&A on the topic; <http://www.bbc.co.uk/news/uk-politics-21523319>. Strong views are presented and often linked to negative impacts of immigration on the welfare state and support for the welfare state (for a more critical discussion of the topic see Baumberg, 2013, http://inequalitiesblog.wordpress.com/2013/04/04/immigration-and-reciprocity/). A focus on immigration as an area in this chapter allows us to highlight issues that will be important for the findings in chapter 7 focussing on immigration and support for the welfare state. In other words, it allows for a more in-depth focus in this area, as well as providing an illustration of issues found across welfare pressures.

Quality issues found by use of quality criteria

The following discussion is in the order of the numbered quality appraisal criteria (see table 4.2), and it adds to the overall issues identified across studies. Rigour and relevance, the two criteria of realist synthesis, are implicit in these and no particular findings were made where the use of these differed from those of the criteria in table 4.2. Overall, all studies have a clear research question included, and studies also have clearly presented theoretical perspectives that guides the research design used and approach taken. In terms of their study design most studies have an appropriate research and study design; however, overall there is too little discussion of the limitations of the methods used. As most of the studies are articles or chapters in books a reasonable assumption is that this is due to limited space. However, one can argue that this still should be examined further than currently done, as methods such as SEM and multilevel modelling come to dominate, even where they may not be the best methods to answer a particular research question. A few studies utilised bivariate analyses only, which is problematic in an area where we know there are a multitude of variables that influence attitudes at the same time. The studies in question are Van Oorschot (2008), Crutchfield and Pettinicchio (2009), and Koning (2011), the impact of this on their findings will be addressed in chapter 7. In table 4.1 you will find an outline of the studies, their weaknesses and the justification for keeping them amongst the included studies. Table 4.2 outlines the quality criteria chosen in the discussion in the previous chapter to be used as a reference in the discussion here. Whilst it is important to control for other factors one may argue that exploratory bivariate analysis may help us gain some understanding of associations between variables, however, this underlines a need for authors to recognise these limitations, something that Van Oorschot (2008) does to a greater extent than Crutchfield and Pettinicchio (2009) and Koning (2011). However, they are all seen to contribute to the explanations identified in terms of the associations between immigration and support for the welfare state and are thus included in the review.

## Table 4.1 Immigration studies with Quality issues

|  |  |  |
| --- | --- | --- |
| Author & Year | Why problematic | Why used? |
| Van Oorschot (2008) | Bivariate analysis only | Feeds into other studies by Van Oorschot, adding to the deservingness theory and explanation |
| Crutchfield and Pettinicchio (2009) | Bivariate analysis only | Feeds into knowledge about the impact of acceptance of inequality of others in the population. Countries with higher than average tastes for inequality also have higher income inequality, more population heterogeneity and higher percentages of others in prison In other words, it is a study outside of the deservingness tradition that adds a layer to its explanation |
| Koning (2011 | Bivariate analysis only | Again adding another layer to the explanation of attitudes towards immigrants and support for the welfare state. Large proportions of the population willing to differentiate between immigrants and natives and that this is not an expression of immigrants level of welfare use in a particular country |
| Dancygier and Saunders (2006) | For the immigrant variable- first-generation immigrant from a poor country- not clear if this is a self-selected option | One of two studies that looks at immigrants’ attitudes, and thus important to include, to understand whether different ethnicities have different attitudes, following Alesina & Glaeser’s (2004) thesis. Finds thatImmigrants are no more likely than natives to favour social spending or redistribution. No gap between natives and immigrants in Germany whilst immigrants in the UK have more conservative preferences on social spending whilst there are no significant differences in terms of preferences for redistribution. |

## Table 4.2 Quality criteria

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | Question | Is the research question clear? | E |
| 2 | Theoretical perspective | Is the theoretical or ideological perspective of the author (or funder) explicit, and has this influenced the study design, methods or research findings? | D |
| 3 | Study design | Is the study design appropriate to answer the question?  Are limitations discussed/mentioned? | E |
| 4 | Context | Is the context or setting adequately described? |  |
| 5 | Sampling qualitative | Is the sample adequate to explore the range of subjects and settings, and has it been drawn from an appropriate population? | E |
|  | Sampling quantitative | Is the sample size adequate for the analysis used and has it been drawn from an appropriate population?   * 1. Discussion of how sample is elected?   2. Discussion of value of scales and indices included?   3. Were there issues such as use of factor based indexes which means that sample is reduced and is not valid for the whole population discussed? | E |
| 6 | Operationalization & Internal validity | Operationalization of research questions and concept. Have they ensured low level of ambiguity, closeness to concepts etc?  Has survey or study conducted checks to make sure that people understood what was meant by the WS or checks to ensure that concepts are used consistently? | E |
| 7 | Data collection | Was the data collection adequately described and rigorously conducted to ensure confidence in the findings? | E |
| 8 | Data analysis | Was there evidence that the data analysis was rigorously conducted to ensure confidence and credibility in the findings?  Does operationalized/statistical/theoretical model include all the variables in the model or are some missing? | E |
| 9 | Reflexivity | Are the findings substantiated by the data and has consideration been given to any limitations of the methods or data that may have affected the results? How well does the evaluation address its original aims and purpose? (From Spencer et.al, 2003: 9-10) | D |
| 10 | Generalizability | Do any claims to generalizability follow logically, theoretically and statistically from the data?  For what population or groups of the population?  Does the study draw conclusions based on another level of generality than what the study design allows?  Discussion about how findings relate to wider theory, evidence to support wider claims? (Spencer et.al, 2003) | D |
| 11 | Ethics | Have ethical issues been addressed and confidentiality respected? | D\* |
| E = essential. | | | |
| D = desirable. | | | |
| \*Ethics may be essential in other sensitive fields. | | | |

In terms of the societal context of studies, the context is addressed in studies through their discussion of their theoretical approach as well as by highlighting the importance and background of the issues raised and studied. In other words increased immigration is the context emphasised. However, their findings are mixed in terms of whether or not other aspects are sufficiently discussed, as these could also influence findings and interact with immigration, e.g. timing, economic scarcity etc. The latter could improve the discussion and make for improved understanding of what may occur when we have increased immigration. Thus, enhancing our understanding in terms of when and in what circumstances immigration and ethnic diversity may have a negative impact on support for the welfare state.

Overall there is a general need to critically discuss samples and issues that may be related to sampling in cross-national surveys. As they use secondary data in the shape of cross-national or national questionnaires it seems that authors assume a high level of quality and representativeness of the sample. Furthermore, it seems to be assumed that it is representative. However, in particular in the area of immigration it would be important to understand and discuss samples further to have a more critical understanding of who may be participating and who is not. In other words do all ethnicities and migrant groups have a representation in the sample? Are there any groups that we have reason to believe are systematically underrepresented in the questionnaires etc.?

Furthermore, very few, Edlund (2003, 1999), being amongst the exceptions, discuss the reduction of samples occurring when scales and indices are used. Reductions in sample sizes also occur in terms of treatment of missing data as well as weighting, none of which authors tend to discuss. Linos and West (2003) are an example of authors emphasising missing data, however most studies do not include a critical discussion of the issues related to this. Most seem to assume, sometimes rightly so, that the sample sizes tend to be quite large, and large enough for it not to be an issue. However, it may mean that samples are not representative of the population. On the other hand it is difficult to know whether or not this is indeed an issue as studies do not discuss the reduction in sample sizes, whether there are patterns in those excluded and missing when creating scales and indices etc. This is particularly important as an issue as many studies create scales to account for some aspects of multi-dimensional characteristics of attitudes.

Svallfors (1997) is an example of a study, not within immigration, that engages more critically with the use of survey data and the operationalization process than most other authors. He includes a discussion where he raises issues pertinent to measuring and comparing concepts cross-nationally. He also includes a discussion where he argues in favour of the use of indices to capture a concept such as redistribution better, this is in line with Van Oorschot’s (2010) argument, which he made in relation to measuring welfare consequences. An argument of this thesis is that more discussion is needed focussing on which questions are included, how compatible these are and their colineraity is needed than found currently.

A further issue that was raised earlier, but also found within the area of immigration is the lack of justification of the countries included and the impact these choices have on findings. Often welfare regime theory is used; however, there is a disagreement of this classification in the area combined with changes and reforms in the arrangements within countries which together imply that this could be a weaker explanatory variable than some assume. Furthermore, there may be institutional effects as well as feedback (Larsen, 2006, 2008) effects. In other words citizens’ attitudes may have been impacted by institutions, but also they may also have changed as institutions change and reform themselves. In addition these, possibly changed attitudes, may themselves impact institutions. As a result this is an area that needs further discussion. Especially as multilevel modelling increasingly is used, where the number of countries analysed often is lower than what the methods was designed for, and the minimum number (20 countries), often is not met. In other words the findings may be less reliable than we may wish and this should be discussed at much greater length than currently seem to be the norm in studies.

In terms of operationalization there are a range of issues that needs highlighting, this will be discussed in the next chapters in terms of immigration and redistribution. These chapters will show how scholars operationalize and measure concepts differently and how this impacts their findings. The chapters also include criticism of the way operationalization is approached and how good some operationalization is. This is particularly important when it comes to the concept of redistribution. Operationalization issues will be illustrated in the following chapters as part of the research synthesis in this thesis. This is done as part of an appraise-and-analysis approach, and the emphasis on it is due to the fact that the issue of operationalization was found to be fundamental in how support for the welfare state was explained, exemplifying theoretical approaches in the area as well as impacting findings. Issues around the operationalization and measures of immigrants and their impact on explanations, findings and theories will be explored in chapter 7. For now, however, it is important to underline that there seems to be little agreement in terms of which measure of immigration to be used on a macro level, and that negative attitudes towards immigrants seem to have a negative impact on welfare support. Redistribution will be discussed in chapter 6, and again a wide range of approaches was found.

Importantly, as will be shown in chapter 6, we can argue on the basis of the findings in this thesis that at least some of the disagreement in terms of the explanations of variations in support for redistribution may stem from different operationalization (see also Jæger, 2006). An issue related to operationalization, which will be discussed later, is the lack of discussion of the ambiguity of concepts, something that is particularly important in cross-national studies where concepts may be understood differently and may have different meanings in different countries. It seems, again, that scholars trust the data collection organisations to have standardisation methods in place, however, this cannot be seen as a replacement for in-depth discussions of the operationalization of concepts used in studies. Related to this is the fact that data collection is not discussed in the studies, as scholars again seem to assume that the secondary data used is of high quality. This was listed as an essential quality criterion, however, as no studies discuss data collection and its issues it was decided to be acceptable not to include a discussion of this aspect when making use of secondary datasets that may be deemed major and of reasonable quality (e.g. ISSP, WVS, EVS, ESS, Eurobarometer).

Data analyses are generally conducted in a rigorous manner ensuring confidence and credibility in the findings. However, as discussed, a few studies, which only carry out bivariate analysis, may be said to have weaknesses as the area can be said to be influenced by a range of factors making multivariate analysis necessary. In general findings are substantiated by the data and some consideration is given to limitations of methods and theories. However, there are limited consideration of constraints and weaknesses of methods chosen. In other words authors seem to make use of traditional (OLS regression and logistic regression) and newer, more advanced methods (multilevel and SEM modelling) without sufficiently discussing the weaknesses of their chosen method. Furthermore, there is limited appreciation of distribution of respondents on variables, something that may mean that an increase in one unit may not be equally important for each step of a scale for instance. Verneby and Finseraas (2008) discuss this when it comes to age but other studies do not embark on any detailed discussion nor do they act on it.

In general scholars do not generalise outside of the populations covered by their samples. However, little emphasis is given to levels of generality nor do scholars tend to include critical reflections on the representativeness of the sample to the population. Furthermore, there is little discussion of theoretical and analytical generalisation, which may be due to the lack of theoretical schools of thoughts in the area. One exception is the deservingness theory, represented in the many articles and resources written by Van Oorschot (e.g. 2006; 2008). Overall, however, it may be ‘safe’ for authors to assume that due to the large sample sizes the samples are adequate to enable generalisation to a country. Overall, ethical issues have not been addressed. This is probably linked to the fact that most studies use secondary data and do not see the need to discuss this, as those gathering the data are assumed to have adequately dealt with it.

**Conclusion**

In conclusion, when using the quality criteria created on this project, all studies were deemed acceptable for inclusion, which is to be expected since the majority of included are published in peer-reviewed journals. In terms of areas of improvement three studies use bivariate analysis as their main analysis tools without discussing in-depth the limitations this may have in terms of controlling for mediation and other methodological issues (Van Oorschot, 2008; Koning 2011; Crutchfield and Pettinicchio, 2009). Furthermore, Dancygier and Saunders (2006) should be clearer in defining how their immigration variable is measured. In terms of discussing the details and limitations of the surveys used all studies included assume a high quality of cross-national surveys, but most without in-depth critical discussion. The latter may be seen as problematic as there may be differences in terms of the meaning respondents in different countries may give to abstract concepts such as the welfare state. There is also little critical discussion of other limitations of surveys used and the conclusions one may draw on their basis. These are areas where studies in the area can improve. Further critical discussion of why countries are included and what limitations choices of countries may impose on findings should also be included. As in previous work (Sundberg and Taylor-Gooby, 2013) it is found that studies, due to space constraints, “do not display all methods or results of calculations which may make it difficult to evaluate quality”. It is also argued here that the type of measurement used for a phenomenon, here exemplified by immigration and redistribution, impacts findings. Thus, overall although some weaknesses are identified, showing the usefulness of a systematic review approach, studies are deemed to be of good quality.

As for the broader aim of assessing the use of an adapted and widened approach to quality criteria, the thesis agrees with Pawson et al. (2004) that a wide-ranging number of criteria may lead to quality appraisals becoming Herculean tasks. Furthermore, it is as argued in Pawson et al. (2004), the “standards are prone to complexity, abstraction, contradiction, imbalance and fragmentation” (Pawson et al., 2004, p.12). Here this is shown by how studies may be seen as week, e.g. use bivariate analyses, but strengths in other areas lead us to include it. The complexity is found in that the criteria are abstract as well as manifold, leading them to be time consuming to apply, allowing for only superficial analysis of studies as a result. This is because the studies are analysed not for their finding, but for their methods, overlooking that explanations and enhancement of theory and understanding is the aim of a review.

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# Chapter 5. Overall findings

*“The welfare state proved essential to the social peace, legitimacy and political stability of democratic capitalist countries in the second half of the twentieth century” (Mau & Veghte, 2007, p.1)*

**Introduction**

As discussed previously this thesis applies tool from systematic review and realist synthesis to create and add to patterns of explanations using the framework outlined in the theory section. The chapter critically discusses and explores ways systematic review tools can be used to enhance our understanding of social phenomena in the area of Social Policy. The following presents the overall findings across welfare pressures and support for the welfare measures and gives an overview of the major trends in support for welfare identified by the included studies. The synthesis in the chapter will take the shape of a narrative review, one form of synthesising evidence that doesn’t penalise heterogeneity as much as a meta-analysis. Thus, this chapter will serve as an illustration of how a narrative review may be used to synthesise evidence in Social Policy. Thus the chapter aims to help strengthen explanatory approaches’ power through adding evidence to specific approaches, for example by identifying whether they add more or less weight to self-interest explanations.

One of the main arguments in this project is the importance of appreciating and taking account of the heterogeneity of studies in the area. This heterogeneity makes it problematic to calculate effect sizes due to use of different methods, independent variables and outcomes (dependent variables). As a result the thesis narrows the focus to redistribution as an outcome in the next chapter, and immigration as a welfare pressure in chapter 7. This is done to illustrate how tools from systematic review and realist synthesis can be used to enhance our understanding. In this way we can illustrate and exemplify issues pertinent to the area more broadly, as well as those more specific to redistribution and immigration (concepts dominating the area). Redistribution was found to be the most commonly studied concept in the area, and has thus been chosen to illustrate these issues. The concept embodies all of the methodological and theoretical issues identified through the use of systematic review tools. In particular raising issues around the lack of a theoretical discussion of operationalization of concepts as well as the fact that we need to differentiate between different levels of generality of attitudes- situational and societal. The latter point will also be made when focussing specifically on immigration.

It is argued here that not only can systematic review tools provide an overview of what we know, but it can identify issues such as limitations of available data and surveys, operationalization and lack of theorisation, lack of discussion of what attitudes are and at what level of generality we operate. It can also help identify which areas tend to be analysed and which should be further studied. The chapter also draws on realist synthesis tools as it is focussing on two areas which are identified as important in the area to illustrate how these tools can be used as well as strengths and weaknesses of these. Furthermore, it is argued that systematic review tools may help synthesize existing knowledge as a basis for further analysis. It can also inform us about areas, which needs further studies and improvements. Strengths of the systematic review approach include providing an overview of findings and identifying dynamics not possible in one study only. It is important at this point to highlight that these are but a few examples of the issues and strengths of the method.

Through the exploration of these methods the chapter shows how findings differ by welfare support measure used as well as by welfare pressure, and emphasises the importance of measurements and operationalization as these are found to impact studies findings. In addition to the importance of operationalization, it is shown how attitudes can be placed on different levels of generality and that this is important to understand the dynamics involved in support for the welfare state. The chapter and discussion of the findings will be divided in 2. Firstly, the chapter discusses practical issues found at the early stages of a systematic review, in the data collection stages of the project. Secondly, a general overview of findings across pressures and welfare support measures and issues arising at the synthesis stage of a systematic review is included. This will take the form of an exploration of ways we can approach and apply a narrative review approach to systematic review synthesis.

**Practical issues**

As found in Sundberg & Taylor-Gooby (2013) there are a range of issues arising when making use of tools from systematic review in the area of Social Policy. In the pilot stage of this project as well as in the main stage of the project a range of practical issues arose. These pertain to characteristics of the type of studies found, as well as to databases. However, the following will first comment on some more general issues in terms of data management that were found to significantly prolong the time used to finish the project. These include, time used searching a range of databases (some of which only can be accessed through the British library), limitations and difficulties exporting and importing hits from databases, finding software where resources could be merged and systematised. This discussion is included as a forewarning to others who may consider carrying out a systematic review in this area.

Forewarning: Software and technical issues causing time-delays

Firstly, there are technical issues related to carrying out searches that will get a very high number of ‘hits’ on databases. Thus, computers and programmes tend to ‘freeze’ and shut down, particularly when remotely accessing databases, adding to time used. It takes time to transfer ‘hits’ from search engines to a reference management software takes, especially as there are restrictions on how many one can transfer at a time (and these vary by database), and also depends on reliable and fast internet connections and servers which is not always the case. Furthermore, one needs to change the format of the files transferred to be able to merge all of the hits into one software programme, as an example one can only pass 200 records at a time from Applied Social Sciences Index and Abstract which makes it time consuming when one get 35,818 hits as we did in first instance in the project. As a result both the export of hits from databases to a variety of software (depending on the format databases export in, e.g. endnote/e-mail etc.), the changing of file format, and then the importing to the reviewer programme, much time may be lost. Thus, if one is to carry out a systematic review it is crucial to have considered these limitations before starting the searches. In addition to the problems found around import and export of ‘hits’ one also needs to beware of, and adapt searches, wording and search rules (what wildcards to use, how to truncate etc.). Moreover, searches at British Library must be conducted manually as there is no ability to use copy/paste function on their computers. This adds considerably to the time consumed when one has a long search syntax (see **Appendix 2**). As a result, although smaller databases such as Social Policy and Practice could take three days to search, others, such as IBSS, may take up to 2 weeks. Related to this is the finding that one needs to search a wide range of wording as vocabulary in the Social Sciences vary over time, across disciplines as well as between countries, thus adding to complexity of searches, this confirms arguments made by (Grayson & Gomersall, 2003).

During this project, and after the experiences gained by carrying out the pilot on this project it was decided to make use of a systematic review software, which is accessible online, to ease the process of checking for duplicates and manage the data. It was found that the Evidence for Policy and Practice Information and Co-ordinating Centre (EPPI) reviewer support staff is very good, but costly for a PhD student (£10 per month). Furthermore, due to the very high number of hits found even a specially designed programme such as the EPPI reviewer struggled and the researcher had to pay staff at the EPPI centre to run background duplicate checking (£500 + VAT), as the systematic review was too big for the software (1.3 million duplicates). To ensure a softer running of the project, as well as to make sure the methods applied were sound, the project sought support at various stages from staff at the Evidence Network through both courses and consultancies in earlier stages of the project to shape search strategies, and to choose a comprehensive list of database. This was necessary, as this level of specialist knowledge of the practicalities of carrying out a systematic review were not found at the University of Kent.

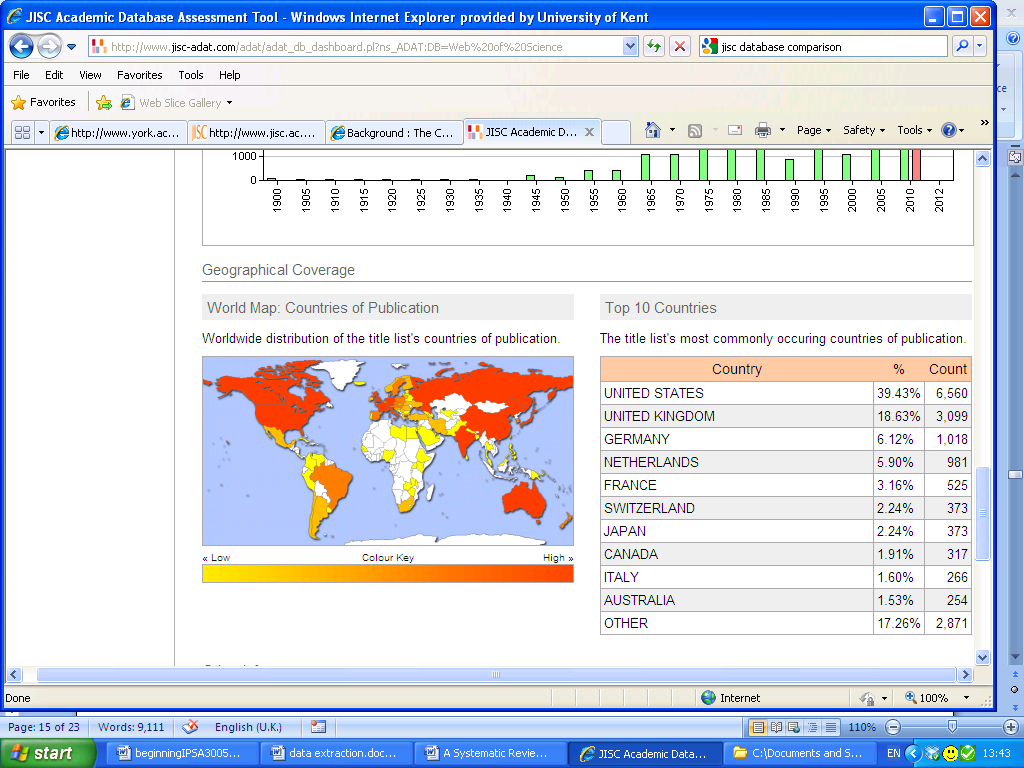
Choosing databases and critically assessing types of sources

Moving from practical issues related to software, and technological issues I would like to highlight and further a discussion of practical issues found in Sundberg & Taylor-Gooby (2013), an article reporting on the pilot stage of this project. As in the article the project overall urges for caution when conducting a systematic review in the Social Sciences due not only to issues around synthesis but also, importantly, around databases. The project has found, as argued in the article, that:

*“Databases tend to over-represent US and under-represent other literatures, that there are substantial differences in coverage between the different databases, that Web of Sciences, with its assumptions and biases, tends to dominate database work, that the vocabularies of key search terms tend to differ between disciplines so that a search from one perspective may miss relevant work from another perspective and that books, book chapters and research papers are systematically underrepresented in all databases despite the fact that these are of considerable importance in many areas of social science”* (Sundberg & Taylor-Gooby, 2013, p. 423).

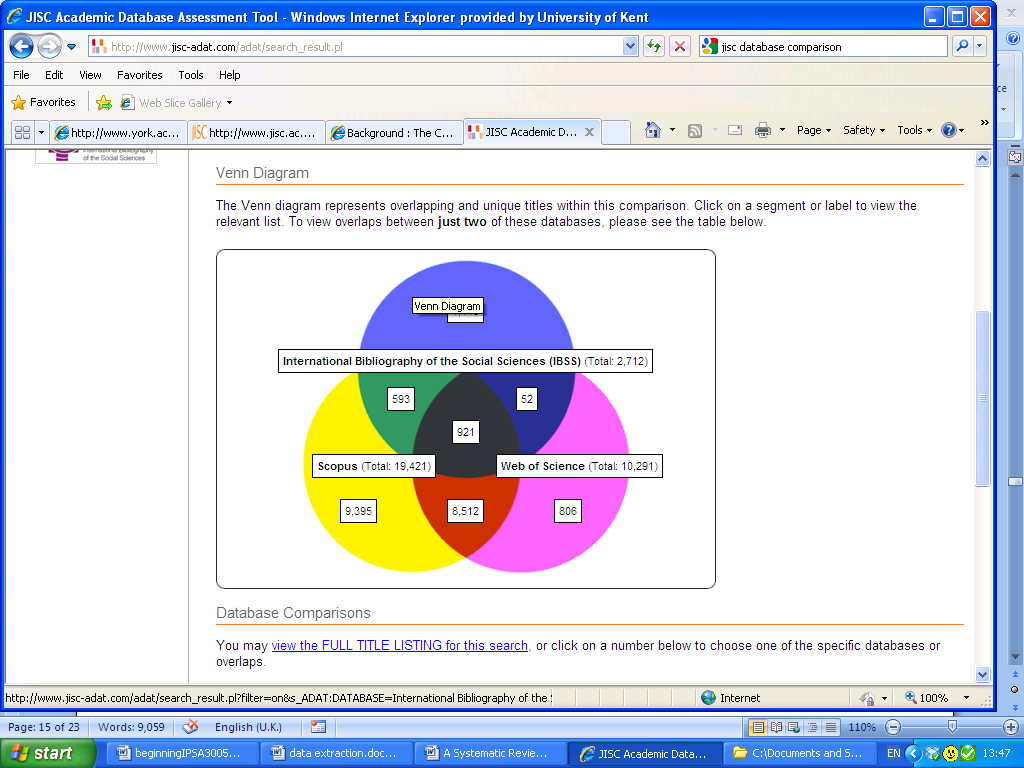
## Figure 5.1 Top 10 countries covered in Web of Science across disciplines

Source : JISC ADAT (http://www.jisc-adat.com/adat/adat\_db\_dashboard.pl?ns\_ADAT:DB=Web%20of%20Science)

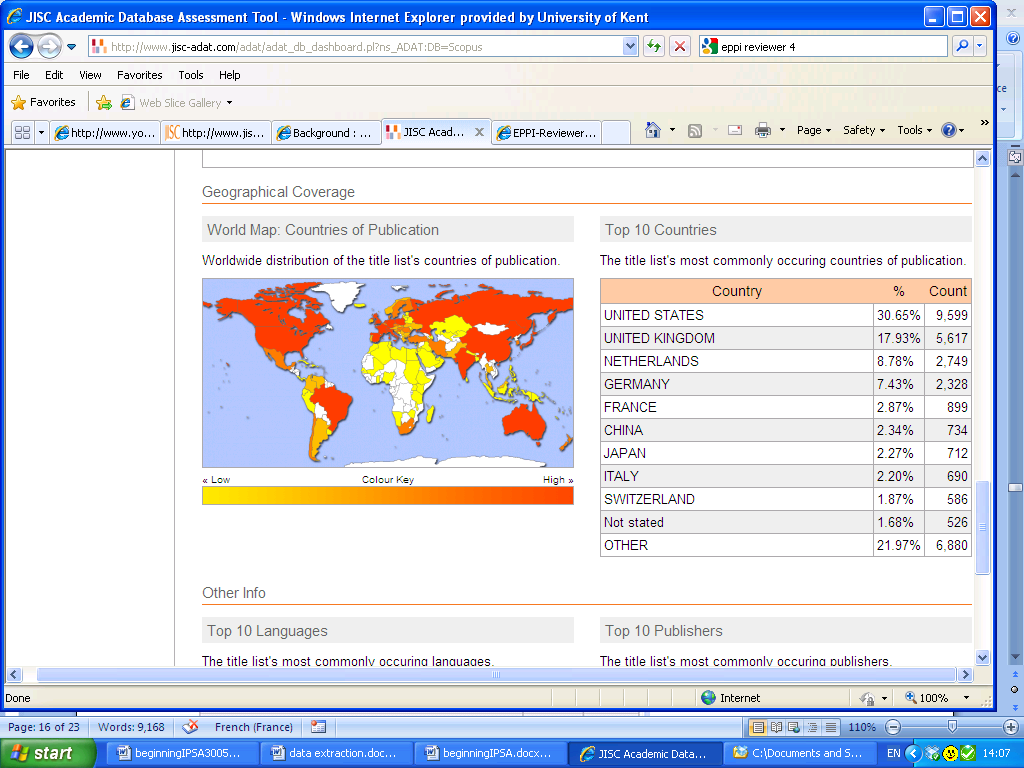


## Figure 5.2 Comparisons of 3 large Social Science databases

http://www.jisc-adat.com/adat/search\_result.pl



## Figure 5.3 Top 10 countries covered by Scopus across disciplines



## Table 5.1 English, German and French Titles

|  |  |  |  |
| --- | --- | --- | --- |
| DATABASE | English titles | German titles | French titles |
| International Bibliography of the Social Sciences (IBSS) | 75%  ([1,813](http://www.jisc-adat.com/adat/search_result.pl?filter=on&s_ADAT:DATABASE=International%20Bibliography%20of%20the%20Social%20Sciences%20%28IBSS%29)) | 7%  ([176](http://www.jisc-adat.com/adat/search_result.pl?filter=on&s_ADAT:DATABASE=International%20Bibliography%20of%20the%20Social%20Sciences%20%28IBSS%29)) | 18%  ([449](http://www.jisc-adat.com/adat/search_result.pl?filter=on&s_ADAT:DATABASE=International%20Bibliography%20of%20the%20Social%20Sciences%20%28IBSS%29)) |
| )Web of Science | 97%  ([8,764](http://www.jisc-adat.com/adat/search_result.pl?filter=on&s_ADAT:DATABASE=Web%20of%20Science)) | 1%  ([125](http://www.jisc-adat.com/adat/search_result.pl?filter=on&s_ADAT:DATABASE=Web%20of%20Science)) | 1%  ([106](http://www.jisc-adat.com/adat/search_result.pl?filter=on&s_ADAT:DATABASE=Web%20of%20Science)) |

Source: JISC Academic database assessment tool

A detailed discussion of these aspects can be found in Sundberg & Taylor-Gooby (2013). The article illustrates this by looking at the coverage of languages as well as where resources tend to come from underlining the dominance of resources in English as well as from two English speaking countries, UK and the USA amongst the resources. This can be seen from the above figures (Figures 5.1, 5.2 and 5.3 as well as table 5.1) As in the pilot the main stage of the study also found that there are more articles than books represented and found by use of databases, underlining the importance, especially in light of the quality issues identified, to make use of strategies that ensure inclusion of relevant books. As a result of the skewed geographical coverage one, as a reviewer, needs to be aware that databases do not necessarily give a ‘true’ picture of the knowledge produced in a specific country. Importantly, it is extremely important to raise awareness of the weaknesses of databases and their coverage, as well as the lack of overlap between these. This is important, as it is not enough to search one major database and expect to find ‘all’ studies on a topic. Moreover, a researcher may incur not only a bias towards published material, but also towards material in English, by authors in the UK and USA, and articles rather than books. Thus, if one desires to research a topic within Norwegian Sociology searches in the larger databases should be complemented by searches in national and regional databases as well as by contacting local researchers in the area. As a result there is a need to use a wide range of databases, supplement these with other sources, which ensures inclusion of books as well as including search strategies, which take into account the changing and diverse vocabulary in the Social Sciences.

For further details on the search process see the methods chapter as well as **Appendices 1 and 2** highlighting databases, journals and searches carried out.

Inclusions, exclusion & duplicates

## Table 5.2 Inclusions, exclusions and duplicates

|  |  |
| --- | --- |
| **Total number of studies taken into account:** | 31,670 |
| **Included in 1st screening:** | 746 |
| **Included in 2nd screening:** | 84 |
| **Total exclusions:** | 30,387 |
| **Duplicates (not taking into account the 1,328,464 other duplicates):** | 537 |

Overall the review attracted a very high number of hits with a total of 1,328,464 duplicates and 458,791 included items. Thus, the search strategies outlined in **Appendix 2** generated a high proportion of non-relevant hits, nearly 99 per cent being excluded by the screening process. This is an issue when carrying out searches in the area of the Social Sciences, and reviewers need to be aware of the fact that similar terms across disciplines may lead to large number of non-relevant hits. Furthermore, there is a large overlap across databases. Examination of the Cochrane and EPPI databases indicates that proportions as high as this are common in more tightly focused reviews in the medical and educational literature. In any case, a low proportion of relevant studies are to be expected in the Social Sciences due to the fact that many journals do not impose rigour in titles, do not use keywords and do not insist on the inclusion of methodological information in abstracts (Petticrew & Roberts, 2006). Furthermore, larger databases are dominated by non-relevant disciplines and topics further adding to the number of non-relevant hits. In addition the search strategy used was inclusive and covered a considerable area in Social Science further adding to the number of achieved hits.

Due to this extremely high number of records it was necessary to work closely with the staff at the EPPI center to determine the best strategies to carry out the review. In accordance with them it was decided to use strategic searches within the review itself to identify the most relevant studies by using the same search terms as those used for the database searches. This approach is in line with a realist synthesis approach allowing for iteration and adaption of a review to ensure a research question is addressed in the best possible way. Here that means identifying sources and using sampling strategies that are purposive in answering the research question (Pawson et al., 2004).

As discussed earlier EPPI center staff ran duplicate searches using their in house servers to identify and exclude duplicates. In the next stage searches within the larger number of studies were ran and 31,670 sources were identified and screened. Of these 746 items were included in the first screening and 84 in the second. It is clear from the high numbers identified in the review that any reviewer attempting to carry out a systematic review making use of traditional methods will encounter not only technical but also time challenges. Thus, as argued already in this project, realist synthesis and an emphasis on purpose and iteration is important to ensure that a project always emphasizes and adapts a review to best answer the research.

The very high number of duplicates also suggests that there is considerable overlap across databases, in accordance with Sundberg and Taylor-Gooby (2013). Furthermore, the high number of exclusions during the 1st stage of screening and the high number of duplicates, underlines that one will embark on a time-consuming endeavor when carrying out a systematic review in the Social Sciences. Based on the experiences made here it is argued that it is extremely difficult to carry out a review that is truly comprehensive, as one would need a team of several researcher as well as time and access to software that can manage a very large number of records. This is very rare, thus a review in this area needs to be pragmatic and open about the problems related to including all relevant studies, and rather focus on iteration and adaption of tools so as to answer a research question in the best way possible. What one identifies can thus be said to be a representation of trends and findings of studies in an area. However, this is not to say that a review is no more than a traditional literature review, as it provides a fuller and more comprehensive overview, as well as a systematization and identification of issues in an area that is not achieved in a traditional literature review.

**What do we know and is it impacted by our operationalization?**

In a traditional systematic review meta-analysis is a commonly used research synthesis approach, and one would expect there to be a calculation of effect sizes in the following section. However, this project argues that the range of methods and dependent variables used makes this analysis method difficult. As a result, the discussion of overall findings will firstly look at the methods covered in the field, then issues around time lapses from when citizens are surveyed to publication, and the impact of disciplines before going on to look at overall findings in terms of trends in support for the welfare state.

A question of methods

In the following I will discuss the main methods used. The most commonly used method used in the area was OLS regression followed by an almost equal use of probit and logit type of regression analysis. Overall then regression is the preferred method to explore and understand support for the welfare state. Only two of the studies are qualitative, one using focus groups as their chosen method (Taylor-Gooby & Rose, 2010) the other making use of qualitative comparative analysis (Peillon, 1996). It is also worth noting that both qualitative studies were carried out by sociologists. Furthermore, qualitative comparative analysis can be seen as a more quantitative tool, thus it is clear that quantitative methods dominants this cross-national field of research. This is to be expected as it is less work intensive and time consuming as well as cheaper to make use of secondary data sources to analyse methods compared to comparative qualitative studies.

A second finding related to methods across all included studies is that the choice of methods seems to be related to scholars’ discipline as economists seem to make more use of probit regression whilst OLS regression is mainly used by sociologists and political scientists. Furthermore, methods are related to the dependent variable, a natural consequence, as certain measurement types and variables necessitate certain types of regressions. It is also clear that structural equation modelling is used to deal with latent variables and construct as well as indirect effects. On the other hand multilevel modelling is increasingly being used both in political science and sociology. The method allows researchers to understand and analyse variations in support both at individual as well as country level and can be seen to result in greater understanding of the impact of both levels of effects and thus overall as a result. Both methods thus add to the field through abilities to analyse aspects of attitudes not possible through probit, logit and OLS regression. Furthermore, OLS regression seemed to be used more in earlier studies. Other analysis methods such as bivariate analysis and factor analysis seems to be used more as a step towards regression and more advanced methods rather than being the end method in itself based on the findings here. In addition Edlund (2003, 1999) make use latent class analysis and multiple classification analysis (MCA). Latent class analysis as a method can be further used to cluster attitudes and dimensions of support for the welfare states together, as it is a tool for clustering and detecting unobserved groups (<http://www.ccsr.ac.uk/qmss/summer/Leuven11/documents/Lecture5_LCA.pdf>). MCA on the other hand can contribute to our understanding of the phenomenon of support for the welfare state as it takes into account inter-correlations between predictors as well as analysing the relationship between several predictor variables on dependent variables (as we also do in regression analyses methods) (<http://www.unesco.org/webworld/portal/idams/html/english/E1mca.htm>).

Meta-analysis uses effects from individual studies to calculate overall effects of variables on an outcome. Here this is made difficult because not all studies use the same methods or the same outcome measure. Some would argue that the project could calculate effect sizes based on studies using the same method, e.g. OLS regression as this is a considerable number of studies (18). However, what we further find here is that the outcome is not measured in the same way by all studies; further supporting the argument of the thesis that traditional meta-analysis may not be applied easily when conducting reviews in the Social Sciences and Social Policy. To explore this further, the thesis will in the next chapter examine one outcome in detail, redistribution, to explore the possibilities to carry out and make use of adapted meta-analytical methods.

Surveys and time lapses

ISSP is the survey that is most commonly used in the area, not surprisingly as it is the cross-national survey that has been running for the longest length of time (first time in 1984). The second most used survey is ESS followed by EVS, WVS and the Eurobarometer. It seems clear that researchers seem to make use of ESS to an increasing degree since its establishment (the first round was conducted in 2002). From the included studies, and as would be expected, the choice of surveys used depends on the outcome variable and research question of a study. This is not surprising; however, the use of tools from systematic review allows this thesis to go further than this conclusion. By doing so it is found that there is a considerable lag in time from the time surveys are conducted to articles are published. The shortest time lag period between when surveys are carried out and publication dates tend to be around 4 years. This is important to have in mind as the societies studied may have changed by the time at which articles are published. Furthermore, it is particularly important when we are studying welfare pressures as pressures change over time and it is difficult to say something meaningful about the ‘now’ when we are using data dating back 4 or more years. It is also crucial, as the concepts we are studying may have changed content and meaning during these time lags, decreasing the validity of the conclusions made. The reason for these time lags may be delays in the publishing processes; accessibility of data and above all that certain waves of cross-national surveys lend themselves to investigate certain issues, e.g. ESS 2002/2003 with its focus on attitudes towards immigration. The latter is very important as the availability of relevant data can be seen as a barrier to our understanding of important phenomena within the area of attitudes to the welfare state and welfare state support.

Disciplines matter

Of the included studies the majority are written by sociologists, followed by political scientists. The other disciplines are political economy and economics as well as 3 interdisciplinary studies and one health study article. Sociology seems to dominate the area by some distance to political science (43 versus 25 studies). At closer inspection there are signs that discipline matters in particular when it comes to chosen methods, but there is also some divergence in terms of how welfare state support is measured and how it is studied.

Even though redistribution accounts for the majority of studies in both disciplines there is some variety in terms of what areas are covered. An example of this is that within political science there are 2 studies on the EU and Social Policy, an area not covered in sociology. On the other hand we see that the sociologists included studies areas such as concern for specific groups (measured as concern for the living conditions for specific groups). The latter group of studies can all be placed within studies emphasising and studying deservingness through theories driven and developed in particular by Van Oorschot (e.g. 2000). It is also clear that a few authors have many publications (in particular Svallfors & Van Oorschot), something that can bias this study and impact what is identified as typical questions to be asked. Stefan Svallfors’ studies focus and emphasise the impact of class and changes in class structures on welfare state support often measured as redistribution and government responsibility. Van Oorschot on the other hand, focuses on deservingness and in particular concern for the living conditions of various vulnerable groups as already noted.

Of the other disciplines the studies from political economy included all focus on redistribution. Compared to politics economy, the studies from economics are more diverse in that they also focus on spending on the unemployed and government responsibility. However, studies from both these areas emphasise skill set, occupation more as explanatory factors. Moreover the language of the articles focuses on people’s preferences and demands in terms of concepts to a degree not found in studies from the disciplines of sociology and political science. Based on the above it is clear that discipline does matters in focus and language when studying welfare state support. The next section will give an overview of the major trends in support for the welfare state. The importance of the nationality of scholars is difficult to comment on here as only comparative studies have been included. This issue should be studied in future reviews.

**Trends in support**

Overall, the biggest group of studies focus on redistribution (20) followed by government responsibility (14) and thirdly studies emphasising spending and mixed measures (12). Immigration as a pressure, which will be examined in detail in chapter 7, is represented by 13 studies. The studies using multi-dimensional measures within the same study most commonly focus on a mix of the following; support for redistribution, intervention and spending. There is also a group of studies that emphasises concern for the living conditions of specific groups (elderly, immigrants etc.), using deservingness theory to study informal solidarity. The next sections will provide a narrative review and account of the main findings by outcome variable and comment on findings across welfare pressures before moving on to an in-depth discussion of findings about attitudes towards redistribution in chapter 6. In that chapter, the discussion and synthesis of redistribution will explore synthesis methods going beyond a narrative review. This chapter starts with a narrative review of the studies emphasising similar dependent or outcome variables that have less than 10 studies in each group, see list below. The chapter then goes on to discuss studies analysing spending, mixed measures, and government responsibility. Table 5.2 gives an overview of the main explanations confirmed across these groups of studies by measure as well as macro-level factors found to influence support for the welfare state. From the table it is clear that self-interest is a very important explanation.

## Table 5.3 First group’s outcomes and findings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No. Of studies** | **Level of generality** | **Explanations confirmed** | **Macro level** |
| **Concern** | 6 | Situational | Self-interest and socialisation/normative orientation | Increased immigration positive impact on concern  Higher spending and where groups are larger related to less concern |
| **EU** | 2 | Situational | Self-interest and normative orientation | Negative effect of generous welfare systems on EU as preferred level of welfare provision  EU’s low level of transfers does not lead to more demand |
| **Pension** | 3 | Situational | Self-interest and socialisation | Culture and welfare regime explanations partially confirmed |
| **Healthcare** | 1 | Situational | Self-interest not confirmed | Types of health care system matters |
| **Unemployment** | 2 | Situational | Self-interest | Higher occupational unemployment impacts demand |
| **Family/gender** | 2 | Situational | Self-interest confirmed | Discrepancy between citizens’ attitudes and policy  UK higher support for maternity leave than USA |
| **Minimum income protection** | 1 | Situational | Self-interest | Welfare regimes confirmed  Higher unemployment rates positive influence |
| **Fairness** | 1 | Societal | All endorse equality as a major welfare state goal | Equality associated with different meaning in the UK and Germany |
| **Inequality** | 5 | Societal | Self-interest | Welfare regimes partially confirmed |

*Concern & informal solidarity*

As discussed in the theory chapter one school of thought in the area uses deservingness criteria to understand and analyse welfare legitimacy. Of the included studies articles written by Van Oorschot and colleagues represent the school of thought. These studies all focus on concern for living conditions of groups in society that may be viewed as needy. This measure is then used to assess solidarity in a society and support for helping these groups as part the responsibilities of a welfare state. The dependent variable used in these studies is based on the question; “To what extent do you feel concerned about the  
living conditions of: elderly people, unemployed people, immigrants, sick and disabled people” (e.g. Van Oorschot, 2006, p. 8). Making use of the levels of generality discussed in the theory chapter we can place these types of attitudes as situational attitudes as they are attitudes towards specific groups in society. The findings from this group of studies can be used to gain a greater understanding of citizens’ judgement of “‘who should get what, and why?” (Van Oorschot, 2000, p. 34).

The studies in this area find that citizens across countries tend to rank the groups in the following order, elderly, sick, disabled, unemployed and immigrants. They emphasise the impact of immigration. Immigrants are the group in society judged the least deserving. Of the studies Van Oorschot & Uunk (2007a; 2007b), Van Oorschot (2008) and Van Oorschot (2006) all deal with immigration, and will be further discussed in chapter 7. Higher levels of immigration have a socialising and positive effect on concern for immigrants supporting contact theory. Furthermore, Van Oorschot & Uunk (2007a and b) find higher concern with immigrants in higher spending countries. In other words different aspects and characteristics on the macro level are important and influence concern. The positive effect of welfare state spending found in regards to immigrants was not found when it comes to the effect on concern for the unemployed (Van Oorschot et al., 2005). When analysing concern for this group, higher social expenditure has a negative effect on concern for the unable and unemployed.

Van Oorschot (2006) found that “Average conditionality is higher, for instance, in the poorer countries of Europe (reflecting perhaps a ‘national burden’ effect); in countries with lower unemployment (possibly reflecting a more negative image of unemployed people); where people put less trust in other people, and in (welfare) state institutions (perhaps reflecting worries about overuse and over expenditure); and where immigrants are looked upon more negatively (Van Oorschot, 2006, p. 37). Furthermore, he found that "People living in the Southern, Central and Eastern European welfare states tend to be less conditional, which is further supported by these countries’ lower social spending, but which is counteracted by the fact that these countries are less wealthy than their Western and Northern counterparts, and that the proportion of Protestants among their populations is (very) low."(Van Oorschot, 2006, p. 38). In other words there seems to be an effect where citizens in higher spending countries are less concerned for the unemployed as they see the welfare state as providing for these. We can expect citizens in higher spending countries such as the social democratic group of countries to be less concerned for this group even though they ranked the group in the same place in the order of deservingness when comparing them with the other groups.

When it comes to which groups in society are more conditional in their judgement of needy groups Van Oorschot (2006; 2008) finds that “conditionality is slightly higher among women, among older people, and among people with less education. No difference exists between people with higher or lower income." (Van Oorschot, 2008, p.283). Other factors that increase conditionality is right placement on the left-right political spectrum. On the other hand people in favour of social equality “are less conditional, regardless of whether they are more leftist or rightist” (ibid). The importance of what can be said to be deeper seated values rather than attitudes related to social equality are complemented by positive effects of social capital as people with more social capital are more concerned towards all needy groups (Van Oorschot et al., 2005)*.* Furthermore, attitudinal traits such as being negative to immigrants, state welfare, welfare dependency, welfare dependants and having lower levels of trust increases conditionality. The latter is important to note as these attitudinal traits have increased (e.g. see British Social Attitude Survey 2012).

*EU*

The EU and its policies have been theorised to impact both national level policies as well as, potentially, citizens’ attitudes towards policies and/or increased integration. There are only two studies amongst the included studies (Burgoon, 2009; Berg, 2007) that focus on the EU and support for the welfare states. Of the two, Berg (2007) finds that attachment to one’s domestic country impacts negatively on the preferred level of decision making in welfare issues, in other words whether or not citizens are in favour of EU decisions in the area. Thus, as long as the public in individual welfare states have strong domestic and national attachment, then Social Policy would be likely to be seen as best provided at a national level policy area by citizens. Taking into account differences between the different types of welfare states amongst the member states, Burgoon (2009) finds that generous national welfare provision diminishes support for EU level assistance. This may mean that one can add to self-interested models of explanations as citizens of generous national welfare provision have their needs covered at the national level. Further to this Burgoon (2009) also finds that the current level of EU transfers doesn’t seem to influence whether or not citizens support national level welfare provision. In other words the fact that the EU at the moment has low levels of transfers in the Social Policy area does not lead to a demand for higher support at national level. The latter may be surprising as one could expect higher levels of support for national level provision given lower levels of EU transfers. On the other hand there has never been high levels of such provision, nor much provision at EU level thus one could argue that there may be little or no expectations for such a thing amongst citizens.

*Pensions*

Of the included studies three are focused on issues related to pensions, an important area due to the pressures created by an ageing population. The three studies focus on 3 different aspects they see as important as a result of these demographic changes. In particular they all study attitudes towards types of pension reforms in terms of types of reforms that should be undertaken as well as preferred types of pension provision. The types of questions included as dependent variables in this group of studies can be seen below.

## Table 5.4 Dependent variables - Pensions

|  |  |
| --- | --- |
| Author & Year | Outcome |
| Velladics and Henkens (2006) | Preferred pension reforms (‘1’ raise the retirement age, ‘2’ raise monthly taxes, ‘3’ lower monthly benefit payments to pensioners, ‘4’ require that children support their parents, ‘5’ abolish early retirement schemes, and ‘6’ make old-age benefits dependent on the number of children. |
| Lynch and Myrskyla (2009) | Desired level of public pensions';  Whether the current PAYGO structure, in which taxes on current workers’ pay for the benefits of current pensioners, should be maintained;  Whether the current retirement age should be raised;  Whether other social spending should be cut to maintain pension benefits at their current levels. |
| Gelissen (2001) | Multi-item measure based on 3 items (the net replacement ratio-the percentage of the original income that is replaced by the pension; the private pension fund assets as a percentage of GDP; the relative share which employers contribute to the financing of social security)  Who should be responsible for pensions: the state only or the individual only  How should pensions be provided (mainly by the authorities, financed from contributions or taxes; mainly by employers, financed from their own and their employees' contributions; mainly by private contracts between individual workers and pension companies) |

From the above it is clear that scholars in all three studies are interested in what type of demands citizens may place on policymakers. Overall the studies find a high level of support for state provision of pension; however, types and levels vary by country and individual characteristics. All studies in the area confirm some kind of institutional and contextual impact on citizens’ attitudes towards pensions. The welfare regime context influences individuals’ attitudes in different ways: “Citizens of corporatist welfare states showed, compared to citizens of liberal welfare states, more frequent preferences for a shared responsibility for the provision of pensions between employers and employees. However, in the less mature Mediterranean welfare states, the general public expects relatively more from the state, despite- or perhaps because of- the rather limited role of the state in social security in these countries" (Gelissen, 2001, p. 517). Furthermore, we can see from the table above that there are differences between Eastern and Western European countries, which means that it is not only welfare regimes but also differences in cultures (which can be argued to be implicit in welfare regime typology) that influence citizens’ attitudes.

At the individual level Lynch and Myrskyla (2009) find evidence of impact of socialisation variables such as partisanship, political mobilization, or position in the labour market in addition to the latter, which is self-interest. On the other hand Gelissen (2001) finds evidence in favour of self-interest explanations “old-age pensioners, women and union members more often prefer state pension provision" (Gelissen, 2001, p.518). Overall thus, we can argue that there may be support for Larsen’s (2006, 2008) political man where citizens adapt their self-interest to the institutional settings they reside within. The latter may also be related to a socialising effect of the institution; however, we will explore these patterns further in the other areas.

*The meaning of fairness*

In the only study using a traditional qualitative method, in this case focus groups, Taylor-Gooby and Rose’s findings (2010) underline the importance of analysing concepts’ meaning through qualitative methods in particular as discourses change and contexts change. They find"that the participants in both countries tend to endorse the theme of equality of opportunity as a major normative goal of welfare states” (Taylor-Gooby & Rose, 2010, p. 100). The important contribution of this study is, however, the differences found in terms of what this concept entails. The study found that in Germany “…equality of opportunity is much more likely to be associated with support for state commitment to provide a common basic standard of services” (ibid). On the other hand in the UK there was a stronger focus on individual agency, as could be expected in a liberal welfare state regime. These findings underline the importance of further studies using qualitative methods to better understand the meaning different concepts have to citizens. It furthermore underlines arguments pointing to the need to be critical to cross-national survey measurements of concepts such as equality as their meaning may vary across countries.

*Family*

Two of the studies included focus on family policies and citizens preferences for these , one study analysing liberal welfare regimes and the other focusing on differences between two Eastern European countries. Again we find that context, and countries’ institutions matter. In the UK there is higher support for maternity leave than in the USA giving support to those arguing for the importance of value and cultural differences, in addition to institutional differences between countries. Saxonberg (2006) studying the relationship between gender attitudes and gender policy identifies a discrepancy between gender attitudes, policies and the needs of women in those countries.

*Healthcare*

Gevers et al. (2000) study support for public health care services across Europe and find high levels of support across countries. Even though there is evidence that suggest a high level of support across countries, there is some support for institutional theories as they find higher levels of support in social democratic and Mediterranean welfare states (Gevers et al., 2000). In addition to welfare state regime types the support is associated with coverage and funding types (measures related to type of welfare state regime) “only in countries with less consolidated national health care services is the preference for public health care higher than in countries where health care is financed by means of social security payments” (Gevers et al., 2000, p. 19**).** On the individual level self-interest theories were not found to have strong effects, “preference for public health care was stronger for people in the highest income group than those in lower, unemployed appear more in favour than working people, leftist political orientation was associated with higher support and women were more supportive than men” (Ibid). In other words there is again mixed evidence in terms of self-interest explanations within healthcare. However, this needs to be analysed in conjunction with findings that the population as a whole is supportive thus there may be less differences between individuals.

*Unemployment*

Two studies look at attitudes related to the unemployed. Taylor-Gooby (2004) is interested in understanding whether there are differences between attitudes to the unemployed and labour related to new social risks and old social risks, and Duman (2010) is interested in individuals’ skills, labour market risks and their influence on social insurance demands. Thus, both studies are interested in understanding whether new and changing labour markets influence attitudes. Duman (2010) finds that rather than welfare state regime type being explanatory it is the occupational unemployment rate and income that determines individuals’ support, both of which can be related to and support self-interest explanations. In his study Taylor-Gooby (2004) also finds support for theories arguing that country context matters. He furthermore finds that there is no simple division between attitudes to old and new social risks, and that these need to be placed within the national contexts. From the below table it is furthermore clear that their measures focus on slightly different aspects, but even so there seems to be strong evidence confirming self-interest explanations in this area.

## Table 5.5 Dependent variables - Unemployment

|  |  |
| --- | --- |
| Taylor-Gooby (2004) | Old social risk measures: The government should provide a job for everyone who wants one; the government should provide a decent standard of living for unemployed people;  New social risk measures: Unemployed people should be forced to take a job quickly, even if it is not as good as their previous job; unemployed people should be given the time and opportunity to improve their education and skills |
| Duman (2010) | Spending on unemployment benefits |

*Minimum income protection?*

I also included one study on minimum income protection. Again the study emphasise contextual level factors and also included measures of unemployment levels at country level. Surprisingly to some the study found that higher social expenditure had a negative effect on support for minimum income protection. Less surprisingly higher levels of unemployment levels, supporting self-interest explanations, lead to higher support. The first is explained by the author in the following way "A generous welfare state with high expenditure levels provides comprehensive protection and leaves few people in the situation of having to rely on MIP schemes, leading to 'saturation' in the population: There is no strong demand for further state involvement” (Pfeifer, 2009, p. 128). Furthermore, findings gave some confirmation to self-interest theories as income and being unemployed mattered across countries (ibid). However, again supporting the theories arguing that citizens react and respond to their contextual reality; “Being unemployed led to significantly stronger preferences for state responsibility compared to the working classes in Germany and Belgium, whereas in The Netherlands the unemployed did not differ significantly from the working classes in their attitudes” (p. 219). Lastly, the combination of smaller welfare states and higher levels of unemployment leads to the higher levels of support for minimum income protection as would be expected from a self-interest explanation.

*Welfare dissatisfaction*

Petterson (2007) finds that when it comes to welfare dissatisfaction institutions again matter. However he also finds that "…the difference in political action between a satisfied and a dissatisfied citizen is small in all countries” (p. 159). In terms of the impact of individual level variables, education and left-right placement (apart from in Portugal) influence dissatisfaction. Even though there are differences between countries the study finds that it cannot say something certain in terms of whether it is the welfare regimes that influence country differences as "Since the relationship between dissatisfaction and political action is insignificant in 6 of the 14 countries, and weak in 8 of the chosen countries" (p. 160). In other words there is some evidence that we have cross-country differences in terms of welfare dissatisfaction and that this to some degree is related to political action, an important finding in pressured welfare states.

*Patterns so far*

Overall, across these studies there is evidence for self-interest explanations both at micro and macro level. Furthermore, it is clear that values and normative orientations influence attitudes, thus underlining the importance of understanding measurements and whether or not they are values or attitudes. Thus, socialisation and normative orientation, whilst found less important than self-interest as explanatory variables, are still important in some cases. Furthermore, studies focusing on societal level measures of support for the welfare state seem to find some more evidence of welfare regime theory than the other measures. The findings could be argued to support theories of citizens as ‘political’ men reacting and acting in reflective ways that are impacted by their setting and institutional reality.

Spending & mixed studies

12 studies can be placed in the group of using dependent variables that are multi-dimensions (mixed studies) and spending. Overall, and across countries there is a high level of support for welfare states by use of these types of measures. Within this group of studies we find support for theories arguing that welfare state institutions may shape people’s attitudes in some studies, but not in all studies. The differences in findings seem related to what measure is used as a dependent variable. Thus, Larsen (2006, 2008), and Smith and Polyani (2003) find support for the welfare state regime hypothesis through use of dependent variables such as attitudes to the poor and unemployed and government responsibility to deal with poverty. Whilst Edlund (2002), Svallfors (2004) and Taylor-Gooby (1999) fail to confirm welfare regime patterns in their studies focussing on support for spending, finance and provision, redistribution and inequality. Importantly these measures cover slightly different areas and goals of a welfare state and tap into different tasks a welfare state may undertake. In other words, it seems that whilst regime patterns are clear when it comes to support for helping the poor and unemployed, it needs to be qualified when we study spending, financing, redistribution and inequality. As a result, researchers need to have clear that there may be issues around operationalization and measurements. We shall embark on an in depth discussion of this when dealing with redistribution. For now it is important to have in mind the levels of spending already in place in countries as well as whether or not citizens draw the link between redistribution and inequality to the welfare state as clearly as they may do when it comes to dealing with poverty.

The below, table 5.7, outlines the dependent variables used in the studies in this group of studies. As can be seen authors use a wide range of measures emphasising a range of aspects of government intervention, spending and responsibilities to gain a better understanding of attitudes towards welfare states. It also seems like authors see a strong link between spending and government responsibility, this is particularly important in light of welfare pressures as we are interested in understanding whether or not citizens may become more or less supportive of for example spending on the welfare state as costs may increase through an ageing population. Thus, it is important to understand what kind of responsibility citizens think government should have and how they should spend available funds. Furthermore, the fact that studies focusing on welfare support as well as spending use a variety of measures is an interesting one underlining the complexity of welfare state structures.

## Table 5.6 Mixed studies dependent variable measures

|  |  |
| --- | --- |
| Smith and Polyani (2003) | Governments responsibility- poverty- Socially oriented norms (government response to poverty- is the government doing too much, too little or about the right amount for people in poverty) |
| Larsen (2006) | Public support for welfare; attitudes to the poor and unemployed; deservingness; attitudes to the living conditions of the poor and unemployed; As the dependent variable in the book the author discuss attitudes related to policies that concern the living condition of the poor and unemployed. |
| Svallfors (2004) | Government responsibility- Support for government intervention index- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; keep prices under control; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor?; give financial help to university students from low-income families; provide decent housing for those who can’t afford it?  Welfare spending index (listed below are various areas of government spending. Please show whether you would like to see more or less government spending in each area. Remember that if you say 'much more', it might require a tax increase to pay for it. Health, old-age pensions and unemployment.  Swedish data: Spending index (taxes are used for different purposes. Do you think that the amount of tax money used for the following purposes should be increased, remain unaltered, or decreased? Medical and health care/support for the elderly/support for families with children/housing allowances/social assistance/employment policies) Finance index (how do you think the following services should be financed? health services/childcare/care for the elderly as well as primarily through taxes and employer contributions (1) to a larger extent through special fees from those who use the service- sickness insurance/unemployment insurance/pensions); Service index (Who do you in general consider to be best suited to deliver the following services? education/health services/childcare/care for the elderly/social work |
| Taylor-Gooby (1999) | Inequality- support for market provision - redistribution - level of agreement with 3 variables government should reduce inequalities, progressive tax and income differences are necessary; perceived reality and aspiration of 5 types of images of inequality across countries; perceived and ideal pay for unskilled worker, factory owner, shop assistant, lawyer; support for market provision- shown as should higher incomes buy better services in education and health care (measured as whether it is just or unjust that people with higher income can buy better health care/education than people with lower incomes); support for a redistributive state by older people ( 54+), working women, working in sheltered sector, working in private sector, endorsement of market inequalities by older people ( 54+), working women, working in sheltered sector, working in private sector |
| Roller, E (1995) | Equality of opportunity- Redistribution - Government responsibility, Support for different socio-economic equality policies measured as: equality of opportunity (measured as 'the government should provide more chances for children from poor families to go to university) and equality of result which is divided into two dimensions 1) national minimum again divided into two items 1.1 the government should provide a job for everyone who wants one 1.2 the government should provide everyone with a guaranteed basic income. 2) Redistribution measured by two items 2.1 the government should reduce the differences in income between people with high incomes and those with low incomes- this variable is called reduction of differences in income 2.2 People with high incomes should pay a larger proportion of their earnings in taxes than those with low incomes this variable is called 'progressive taxation' |
| Borre (2003) | Government spending- extent and area (should expenditure on an item be increased lot or a little, stay the same as they are at present or whether they should be decreased a little or a lot: environment, health, law enforcement, education, defence, retirement, unemployment benefits and culture and arts) |
| Saxonberg (2005) | Government responsibility- Redistribution Big Public sector (government responsibility for providing housing, healthcare and providing jobs; attitudes towards increased spending on unemployment benefits, pensions, education, healthcare and job creation); Equality (support for income redistribution, wage control and price control, and supporting higher taxes for those with high and medium incomes) |
| Larsen (2008) | Redistribution - Cause of poverty- Why are there people in this country who live in need (unlucky/laziness/injustice in society/inevitable part of modern progress); attitude to redistribution, provide jobs to all and provide basic income to all |
| Edlund (2007) | Redistribution - Government responsibility- It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes; Listed below are various areas of government spending. Please show whether you would like to see more or less government spending in each area. Remember that if you say 'much more' it might require a tax increase to pay for it [B] Health, [C] Education, [D] Old age pensions, [E] Unemployment benefits; On the whole, do you think it should be or should not be the government's responsibility to [F] provide a job for everyone who wants one, [G] Provide health care for the sick, [H] Provide a decent standard of living for the old, [I] Provide a decent standard of living for the unemployed, [J] Reduce income differences between the rich and poor, [K] Give financial help to university students from low-income families, [L] Provide decent housing for those who can't afford it; Generally, how would you describe taxes in (country) today? [M] for those with high incomes, are taxes .... |
| Nordlund (1997) | Government spending- Government responsibility- misuse- Variables can be structured into 4 aspects of Social Policy: Public expenditure (medical and health care/support for the elderly/support for families with children/employment policies/housing allowances/social assistance/public administration); financing (health care/child care); service delivery (health care/child care/care for elderly) and misuse (health service/sick leave insurance/unemployment insurance/social assistance/housing allowances). |
| Bean & Papadakis 1998 | Government spending- spending on specific welfare programmes- More or less government spending on health, education, old age pensions and unemployment benefits. Support for government intervention- Should it be the government's responsibility to provide jobs for everyone who wants one; provide health care for the sick; provide a decent standard of living for the old; provide a decent standard of living for the unemployed |
| Pettersen (1995) | Government spending- support for expansion or reduction of social services and benefits; attitudes to social security, social reforms and old age pensions in the Nordic countries; support for increased spending on old age pensions, health services and unemployment benefits, support for an increase in old age pensions |

In terms of confirmed explanations, Larsen (2006, 2008) finds that it is important to join together deservingness theory and institutional theory as perceptions of why people live in poverty and deservingness criteria influence attitudes and support for the welfare state. Furthermore, he finds that citizens can be analysed as ‘political men’ who operate within regime dependent realities. Thus, norms, socialisation, self-interest and class need to be analysed within these frameworks, and citizens must be seen as reflective and aware of these. In terms of studies emphasising class as an explanatory variable we see that studies analysing these aspects do not tend to confirm welfare state regime theory. Class is important, but in different ways than may be expected as countries where you may expect lower class conflict based on the power resource theory such as Sweden and Norway have strong class effects (Svallfors, 2004). Analysing changes over time Svallfors (2004) finds neither an “erosion nor a sharpening of class differences in attitudes."(p.133). Both Saxonberg (2005) and Edlund (2007) confirms these types of findings bringing Edlund (2007) to conclude that the higher levels of class conflict in the social democratic countries is due to the organised and institutionalised political cleavages in those countries (Edlund, 2007).

In terms of other explanations it seems like self-interest finds some support, but not in all studies. Roller (1995) finds that there are high levels of support for some equality policies in Western Europe. She also finds that levels of standard of living explain differences in levels of support as increasing equality of income and increasing wealth of a country is related to lower support for equality policies. This supports scarcity and self-interest explanations of support for the welfare state; this is confirmed in Taylor-Gooby (1999). On the other hand, Bean and Papadakis (1998), find strong support for the welfare state across countries, but fail to find confirmation of self-interest explanations. Pettersen (1995) finds high levels of support for the welfare state, which are not decreasing over time, rather that there are ups and downs. He argues that the ‘down’s are “connected to general changes in the national political mood. Looking at attitudes towards expansion of welfare services it seems that self-interest to some degree can help explain these. However, self-interest may not explain the finding that younger generations are not more supportive of unemployment benefits, and it is suggested that class interest and normative orientations are crucial for understanding of spending priorities.

Nordlund (1997) finds high levels of aggregate support for welfare states in Scandinavia in the early 1990s despite economic crises. In other words, there is no sign for weakening of support despite worsening economic situations. What is found, however, is that support varies across measures: "Solid support for welfare spending, financing and to some extent the state and municipalities as service providers were combined with relatively weak support for public administration and considerable suspicion of misuse and fraud regarding social programs" (Nordlund, 1997, p. 244). In other words to understand the impact of difficult economic situations and crises on support for welfare states scholars need to make use of multi-dimensional measures and self-interest and socialisation explanations may have different weight and explanatory power for different measures.

Overall then there is high support for this measure across countries for this situational level of attitudes. However, the explanatory patterns that are confirmed depend on the dependent variable measure. Thus, welfare state regime theory is confirmed by some scholars and not by others. Furthermore, there is support for self-interest explanations and more so than for the groups of studies analysed so far.

Government responsibility

The following will give an overview of a group of studies focussing on government responsibility. First the similarity in focus on outcome variables will be discussed, for then to give an overview of the findings in the area. Government responsibility is the second largest group of studies after redistribution, and is an area where some agreement on the outcome variable to be studied exists. Several studies use the same measures (see table 5.7 and 5.8). This may be a result of making use of the same survey data (ISSP) as well as governments across the included countries tending to have responsibilities in similar areas of society. Some studies such as Forma & Kangas (1999) are focusing on specific areas, pensions, Kumlin (2007) making use of a separate survey (focusing on trade unions and working conditions, typical old social risks) as well as Gelissen (2000) focusing on extensiveness of Social Policy. Breznau (2010) also focuses on a separate area, and studies what roles governments with a stronger more market focus should play.

## Table 5.7 Government responsibility dependent variables

|  |  |
| --- | --- |
| Jæger (2007b) | Government responsibility for the old and the sick- on the whole, do you think it should be or should not be the government's responsibility to. 1 provide a decent standard of living for the old, 2 provide healthcare for the sick |
| Luo (1998) | Government responsibility - Redistribution- Government's role in solving unemployment (measured by the question the government should provide a job for everyone who wants on; Government should finance projects to create more jobs; Government should provide a decent standard of living for the unemployed); Government's responsibility in reducing income inequality (It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes; On the whole, do you think it should be or should not be the government's responsibility to reduce income differences between the rich and poor); perceptions of intergenerational mobility (a person whose parents are rich has a better chance of earning a lot of money than a person whose parents are poor; in respondent's country, what you achieve in life depends largely on your family background; a person whose father is a professional person has a better chance of getting ahead in life than a person whose father is a factory worker) In these longer descriptions is there a way to format these so they are listed in bullet points? Just a thought. |
| Kalenthaler & Ceccoli (2008) | Government responsibility – options from: the government should take more responsibility to ensure that everyone is provided for to people should take more responsibility for themselves |
| Forma& Kangas (1999) | Government responsibility for pensions - What do you think of these government policies for providing income for retired people: a) no government old age pensions, people save for themselves, b) a government old age pension paid from taxes given only to poor people, c) a government old age pension paid from taxes given to everyone over 65 |
| Peillon (1996) | Government responsibility- On the whole, do you think it should be or should not be government's responsibility to: provide health care for the sick; provide a decent standard of living for the unemployed; provide decent housing for those who can't afford it? |
| Andersson (2010) | Government responsibility- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor?; provide decent housing for those who can’t afford it? |
| Taylor-Gooby (1998) | Government responsibility- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor? |
| Koster (2009) | Government responsibility- should individuals take more responsibility for providing for themselves or should the state take more responsibility to ensure that everyone is provided for; redistribution- should incomes be made more equal or do we need larger income differences as incentives for individual effort |
| Kumlin (2007) | Government responsibility- State intervention (two indices: the government should take measures to reduce differences in income levels and employees need strong trade unions to protect their working conditions and wages 2nd:important that government ensures safety against all threats, that the state is strong so it can defend its citizen, important that every person in the world is treated equally, and that everyone should have equal opportunity in life; Voting; political trust; Evaluation of Welfare State related outcomes (the state of health services in [country] and the state of the education in [country] - placed from 0 extremely bad to 1- extremely good |
| Gelissen (2000) | Government responsibility- Support for extensiveness of Social Policy (index based on social security is a major achievement of modern society. The government should make sure that nobody is left deprived when unemployed, poor, ill or disabled/the government must continue to provide everyone with a broad range of social security benefits even if this means increasing taxes or contributions/some people cannot earn enough income to live on, because of disability, old age etc. to what extent do you agree or disagree that the right to claim assistance from the authorities should be guaranteed; support for intensiveness of Social Policy (index based on social security is too costly for society. Benefits should be reduced and contributions should be lowered/the government should provide everyone with only a limited number of essential benefits (such as health care and minimum income) and encourage people to provide for themselves in other respects/the government should provide everyone only with essential services such as care for serious diseases, and encourage people to provide for themselves in other respects. |
| Svallfors (2003) | Government responsibility- Support for government intervention index- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; keep prices under control; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor?; give financial help to university students from low-income families; provide decent housing for those who can’t afford it? |
| Tworzecki (2000) | Government responsibility- Welfare support index based on: It should be government's responsibility to provide a job for everyone who wants one; unprofitable factories and mines should be closed, even if this leads to unemployment; Guarantee that less economic burden is put on the shoulder during the transformation of our economy; increase pensions and social benefits |
| Breznau 2010 | Government responsibility- What part should the government play in running companies in these industries…hospitals/doctors and dentists/schools/universities/day-care centres for children/old age homes; Should the government regulate prices or should they be set by the free market…electricity/basic foods/rents for houses and flats/doctor's fee and hospital charges; To keep prices low, should the government subsidize the production of…electricity/basic foods/construction of houses and flats/doctors and hospitals |
| Goerres & Tepe (2010) | Government responsibility-On the whole, do you think it should or should not be the government's responsibility to provide childcare for everyone who wants it? Definitely should be to definitely should not be |

As with overall support for mixed measures of support for the welfare state there seems to be high levels of support across countries (Jæger, 2007). Furthermore, national context matters, but variations do not always follow expectations based on Esping-Andersen’s (1990) theory. Similarities across countries are highlighted in Jæger (2007b), and in particular when correcting for cross-national heterogeneity. Thus, the main finding in his study is that "once nationally idiosyncratic perceptions of the response scale is accounted for, respondents in the eight countries under study all seem to agree to an even higher extent that the government should claim responsibility for the well-being of the old and the sick" (Jæger, 2007, p. 89). Furthermore there seems to be support both self-interest and socialisation theories as in the other groups of studies. Overall, as a result of the higher homogeneity of dependent variables there seems to be more similar across the studies. This finding is important to note as it is enabled by the method used in this project.

As for other macro-level variations, Koster (2009) finds support for scarcity theory as poorer countries have higher support for government intervention. The study also finds an increase in support for government responsibility over time (Koster, 2009, p. 15). The author argues that this may mean that the findings may be explained by higher levels of insecurity as a result of globalisation leading to demands for government intervention, in line with self-interest explanations. However, scarcity is not confirmed in the more detailed analysis. Kumlin (2007), analysing the impact of dissatisfaction with welfare states on support for state intervention, finds that welfare regimes matters. He finds that dissatisfaction has a negative impact in the Scandinavian countries and concludes that; “our data predict that in social democratic welfare states with little political power dispersion, dissatisfied citizens become less supportive of state intervention but more inclined to report rightist ideological left-right self-placements” (p.110). However, in most countries “It is the legitimacy of the democracies of Western Europe- rather than its welfare states or its incumbent governments- that will really suffer from increasing welfare dissatisfaction" (p.112).

Forma and Kangas (1999) analysing government responsibility for pension show similarities across countries as there is an overall scepticism against a model where there is no basic pension at all. However, there were still cross-national differences, which could be argued to follow the welfare state regime typology; “This kind of marginalism was more popular in 'liberal' Australia than in 'corporatist' Poland, or in 'universal' Finland, and Australia leads in the support for selectivism, while universal benefits are most popular in Finland” (Forma & Kangas, 1999, p.181). Again though, the authors also underline that there are similarities across countries as universal pensions are the most popular type of pension model in all countries. Andersson (2010) also finds differences across welfare regime types; "Respondents in social democratic and conservative welfare regimes are more likely to have positive attitudes toward welfare policies that are not considered ‘major’ welfare provisions (pensions, healthcare and unemployment) (Andersson, 2010, p.12).

Tworzecki (2000) studying two Eastern European countries, Poland and Hungary, finds discrepancy between citizens’ attitudes towards social justice and market reforms being carried out. However, and maybe as a comfort to politicians, these "Welfare-state attitudes were found, however, to be only weak predictors of voting intentions” (p. 25). On another hand, Goerres and Tepe (2010) find that macro level factors’ impact “are characterised by various dynamics; political (the general level of family spending by the state), economic (the extent to which women are integrated into the labour market) and cultural (the public opinion towards working mothers)" (Goerres & Tepe, 2010, p.820). In other words macro-level and institutional variables matter but not necessarily according to the welfare state regime typology.

Taylor-Gooby (1998) in his study finds a weakening of support over time in most policy areas across countries, but no convergence. Importantly, his findings go against the predictions based on a welfare regime typology "British opinion does not appear to be strikingly less supportive of welfare in general than that in corporatist countries, and is in fact noticeably more supportive of some of the more integrative aspects of provision. The recent trends in welfare policies towards an emphasis on jobs rather than benefits finds sympathy in German popular attitudes, while benefits are favoured in Sweden" (Taylor-Gooby, 1998, p. 71).

Self-interest explanations are emphasised and confirmed in Kalenthaler and Ceccoli (2008), in their study, which focuses on the role of risk. Their argument is that "that citizens are conditioned mainly by their economic self-interest, their attitudes toward risk in life, and the context in which they form their opinions. The analysis shows that individuals do, in fact, calculate the expected economic cost and benefits of who should be responsible for welfare provision in predictable ways" (p.1059). In other words, individuals are impacted by their risk assessments and acceptance, an area not covered in most studies in this area. Furthermore, they also find that this risk and self-interested behaviour is impacted by the national context in which individuals exists. Svallfors (2003) also finds support for self-interest explanations across countries at individual level “Groups with weaker market position, such as workers, women, and the unemployed are more supportive of welfare state intervention than groups with a stronger market position "(p. 189).As in studies focussing on class with different outcome variables class is found to be particularly important in Sweden, but now also in France (Svallfors, 2003). An important aspect not taken into account by the authors is immediacy, in the sense that although self-interest may help explain immediate self-interested reactions, underlying value sets may be different in the same individuals. This can also be related back to the levels of generality where situational type attitudes and explanations such as these may change faster than deeper-seated values. Furthermore, they also find that this risk and self-interested behaviour is impacted by the national context in which individuals exist. On the other hand, whilst Forma and Kangas (1999) find little support for effects of factors such as gender, class and political affiliation, and Andersson (2010) finds that normative values and orientations are important, as have other studies in this group (e.g. Gelissen, 2000).

Breznau (2008) confirms other studies in this group when he finds that supporting a reduction in social inequality, referred to as goals in Luo (1998) are “most likely to support welfare-related policies including government control for social services, price controls and subsidies for basic needs of electricity, food, housing and health care" (Breznau, 2008, p. 477). Luo (1998), using government’s role in solving unemployment, is particular in his focus as he differentiates between different types of attitudes, calling them means and goals. Means for him are specific policies, which would be placed on the situational level of generality in this study. Goals are defined as general values, and would be placed on a societal level of generality in this study. Interestingly he finds that values are crucial to predict support for means and that socio-economic variables’ effect on support for means decline substantially once values are introduced into a model. Luo (1998) finds that although SES characteristics such as party affiliation are more stable, perceptions and goal attitudes affect attitude and furthermore he finds that these findings are similar in the USA and Britain. The main differences between the two countries are found in terms of the impact of education and family income. In other words although similar trends are found in the two countries national contexts still seem to matter.

As Tworzecki (2000) Breznau (2008) finds that citizens in communist countries have attitudes that are contrary to those of their Western European counterparts and their own governments. Here national context matters and citizens in former "Communist countries are more likely to support price controls and subsidies than their traditionally capitalistic counterparts" (Breznau, 2010, p.478). In terms of individual level variables Breznau finds support for both self-interest and socialisation theories. He also finds that in Bulgaria and Poland education was much more important than in other countries, however, without providing a good explanation for this.Goerres and Tepe (2010) find that older people’s attitude towards public childcare is driven by altruism rather than pure self-interest, and that "intergenerational solidarity matters for older people's attitudes towards public childcare provisions” (Goerres & Tepe, 2010, p.820). The findings show that interaction within families is important to explain support for public childcare and gives support to personal experience explanations.

The only study included that makes use of qualitative comparative analysis, Peillon (1996) finds that merit is an important explanatory factor in a combination of factors explaining high support for social services. As Bean and Papadakis (1998), Peillon finds weak support for self-interest as "Evidence indicates that this support is based on values and beliefs, and not predominantly on self-interest…The hypothesis loosely derived from Esping-Andersen's classification fares a little better. However, most of these factors are superseded by the significance of the scope (wide) and nature (transfer) of welfare programmes" (p. 189). In other words socialisation and value explanations are found to be important in his study.

Thus, in the area we find high support in combination with more similar findings across studies due to similar dependent variables. It is furthermore found that self-interest is an important explanation, and this is seen in combination with support for the importance of national context that together adds strength to a ‘political man’ explanation of attitudes. In addition values are again found to impact attitudes, again underlining the importance of having in mind the relationships between values and attitudes when studying support for the welfare states and its explanations.

Inequality

The studies focusing on inequality, in addition to have the tendency of including several different measures to analyse inequalities, tends to use these to create indices. This is a method argued by Van Oorschot (2010) to be important to understand the multidimensionality of attitudes. Whilst Laczko (2005) emphasises state intervention and whether or not the state should intervene to reduce inequality, Aalberg (2003) and Taylor-Gooby (2004) focus on fairness of pay differences and pay for different types of occupations in addition to government responsibilities, including governments’ involvement in how markets should be managed. Kalenthaler et al. (2008) analyse government intervention through the question; should governments eliminate big inequalities? Sachweh and Olafsdottir (2010) analyse the perceived inequality and stratification of society by use of the questions asked in ISSP using different shaped pyramids perceived and ideal distribution of inequality in societies. Of these studies 4 out of 5 make use of ISSP data (Laczko, 2005; Aalberg, 2003; Sachweh & Olafsdottir, 2010; Taylor-Gooby, 2008), one world value survey (Aalberg, 2003) and one the European value survey (Kalenthaler et al., 2008).

In terms of findings, Laczko (2005) finds that national context matters more in 1992 than in 1999 as the higher support for overall level of support for state activity and perceived income inequality was higher in the UK in 1992 than in Canada but the difference had narrowed by 1999. Laczko (2005) further finds a higher support for state intervention to reduce inequality in Quebec and Scotland in 1992, but no significant difference between Scots and the UK population in 1999 whilst the Quebecker’s support remains higher. Aalberg (2003) finds an association between support for the ideal of equality and egalitarian policies but does not carry out analyses further than bivariate associations; thus, we cannot suggest what may explain these.

Sachweh and Olafsdottir (2010) again find that national contexts influence attitudes and perceptions as "While Americans view their society as highly inegalitarian, their aspirations for a more egalitarian shape of stratification are smaller than those of Swedes or West Germans…East Germans and Americans display the most inegalitarian perceptions of the stratification reality of their respective society, but at the same time also have the lowest egalitarian aspirations." (p. 160). On the other hand Swedes display more egalitarian views both in their ideal as well as aspirations (2010). Contrary to this, Taylor-Gooby (2004) does not find that welfare values follow divisions of regime theory. He finds that across countries “most people endorse interventionist welfare state committed to the improvement of social equality, they do not concede market principles that inequalities are essential to improve national prosperity, they do not accept that those with higher incomes should be able to buy better health care and education and even more so in liberal regimes, conflicts between different groups found with working women endorsing ws and private sector workers endorsing the market inequality model of society” (Taylor-Gooby, 2004, p.45). Kalenthaler et al. (2008) finds that "Potentially even more important than one's material self-interest seems to be an individual's attitudinal predisposition about the issue of income inequality...The result of this study show that one's attitude toward recognizing the importance of merit is the best predictor of how Europeans think about income inequality"(p. 235). In other words they find that attitudinal characteristics beyond self-interest and national contexts are crucial to understand people’s support or not for inequality. From the results there seems to be a stronger support for the welfare regime theory as an explanation when measuring support for the welfare state as inequality. Furthermore, values are again found to be important to explain attitudes.

**Conclusion**

Overall, I identify a complex set of dynamics when it comes to explaining attitudes towards support for the welfare state. It seems that a ‘political man’ (Larsen, 2006; 2008) that is influenced and socialised by institutions and frameworks, and whose self-interest is adapted to these may be the explanation that overall receives most support. It has been shown that there are different trends in individual level variables’ effect on support for the welfare state depending on measure. However, it is important to underline that self-interest seem to play an important part in explaining support for the welfare state. Overall, we can say, like Svallfors (2010), that the welfare state as a general concept is quite popular amongst citizens in the included countries. For studies focussing on the importance of class, as Svallfors does himself (e.g. 2004), class if found to be important albeit more important in social democratic welfare state regimes, going against what one may expect according to welfare state theory. In this study we have seen that the individual variables found to be more important vary by outcome measures, and although self-interest is important other explanations such as normative orientations and values are important. Whilst Svallfors (2010) claims that studies found differences between general and specific support for the welfare state as well as universal and selective programmes, this project has found that he is correct in concluding that citizens’ support differs by outcome measure and not only whether or not they are general and specific. Furthermore, we find that there is high level of support for some government intervention across countries through measures of role of government and spending. However, there is also support for areas such as pension whereas other specific programmes such as unemployment have less support, and we have seen that people’s concern for different groups can be ranked consistently.

# Chapter 6. A question of redistribution

*“He that learns nought will never know how one is the fool of another, for if one be rich another is poor and for that should bear no blame” Havamål- verse 93 – The Edda (13th century)*

**Introduction**

Issues pertaining to how resources should be distributed in a society are fundamental in any country. In relation to citizens’ welfare, who should get what and why are basic questions that need answering to decide how a welfare state should be structured. To understand citizens’ preferences and thoughts about how the welfare state should function is thus crucial to create knowledge about a welfare state’s stability, shape and structure and its potential need to re-negotiate these. As seen in the previous chapter redistribution is the focus and measurement of the largest number of studies identified here, which illustrates the importance it is given by scholars in their quest to analyse support for the welfare state. It is an issue that has been analysed by all disciplines represented amongst the included studies. To a greater extent than the other measurements economists also seem to analyse redistribution. Redistribution is also crucial across sectors and is addressed both by policy makers and the third sector as they seek to distribute and re-distribute resources, both economic and material, amongst citizens. Dancygier and Saunders (2006, p. 963) argue that issues of social spending and redistribution “have defined electoral politics in post-war Europe and are increasingly contested”.

This chapter will start with a short overview of some explanatory approaches towards redistribution to serve as a starting point and introduction to the concept and will go on to make use of adaptive approaches to research synthesis to illustrate how systematic review tools may be used to analyse issues in Social Policy. Redistribution here serves as an illustration, and has been chosen not only because it represents the largest group of studies, but also because the results of the synthesis shows that the concept and area of attitudes and support for redistribution encompasses issues found across studies and thus serves as a good example of the area of support for the welfare state as a whole. Furthermore, the concept is measured on different levels of generality, and thus an in-depth analysis of findings by measurement of the concept is included and exemplifies issues found across support measures. This also serves to explore how values may be affected differently by welfare pressures than attitudes. One of the main arguments here is that difficulties arise in employing these meta-analytical tools due to the range of methods and measures used in the area of welfare attitudes. As a result it becomes even more important to explore different ways of synthesising evidence that emphasises and appreciates heterogeneity.The advantage of the approaches taken in this section is that we appreciate heterogeneity of studies, which is a dominant feature of this field, whilst still getting an understanding of effect directions as well as the prevalence of these. It is argued in the thesis that assessing strength of effects, enabled in meta-analysis, is made difficult by the variety of methods used combined with a lack of standardised coefficients in methods such as multilevel analysis. The focus here will be on using different levels of generality and common theoretical explanations highlighted earlier to identify what effects are found to explain trends in support for the welfare state and build stronger patterns of explanations. The section start with a brief overview of common theoretical approaches to redistribution, and then move on to a critical discussion of the use of meta-analysis and operationalization of redistribution; it will then go on to explore adapted approaches to synthesising evidence.

**Analysing redistribution**

Many writers argue that redistribution and citizens’ views on redistribution are fundamental measurements of support for the welfare state. In the literature, which goes across disciplines, we typically find a difference between those analysing it from a view of people as ‘homo economicus’ versus ‘homo sociologicus’*.* Economists typically analyse preferences and demand for redistribution taking a rational self-interested approach. Thus, explanations include that of Finseraas (2008) who analyses demand for redistribution by looking at individuals’ exposure to risk (Finseraas, 2008, p.408). In other words one would expect individuals’ social location and characteristics to influence their attitudes, and that their attitudes towards redistribution can be explained by their self-interest. We here typically see explanations emphasising characteristics such as occupation determining risk at micro-level, whilst higher unemployment rate and scarcity at macro-level could lead to higher demand for redistribution by those exposed to these risks.

This self-interested focus can be contrasted with a more sociological approach. The (artificial) divide of the two ideal type humans Homo economicus and Homo sociologicuscan be described as; *“Homo sociologicus’*…may be said to be distinguished from the *Homo economicus* by a stress on the social notion of norms rather than the individualistic concept of preferences” (Hargreaves Heap et.al, 1992, p. 64). Thus, when explaining attitudes towards redistribution authors such as Bowles and Gintis (2000) argue, “we think that people support the welfare state because it conforms to deeply held norms of reciprocity and conditional obligations to others”. (p.34). Built into this approach is the sense that social structures, norms and values will influence individuals’ attitudes and thus socialisation has an important role to play. The notion of socialisation is closely entangled with the notion of social structures and institutions shaping attitudes. Andreβ and Heien (2001) argue that this will be shown by “different socialisation patterns resulting in specific values and norms” (Andreβ and Heien, 2001, P 338) which in their study was assumed to “explain inter-individual variation in justice beliefs and attitudes towards the welfare state” (Andreβ and Heien, 2001, p. 340). Thus, welfare state regime types are often used as one type of institutions that influence citizens’ attitudes. To what extent they do influence citizens’ attitudes is a question to which scholars have come to answer differently, as will be seen in the synthesis of this chapter.

An alternative to a binary division of two human ideal types is found in for example Larsen (for example 2008) and Mau (2003) who see citizens as reacting to institutions and norms, and have a more dynamic approach to understanding self-interest, and impact of norms and institutions on individuals’ attitudes. Larsen (2006; 2008) coins it as a ‘political man’ as has been referred to previously. Thus, we see a more dynamic approach that goes further than attitudes being driven by instrumental and self-interested support to a theory where moral economies of reciprocity are created. Here, individuals are closer to a ‘political man’ (Larsen, 2006) or ‘public spirited citizen’ (Mau, 2003) rather than ‘homo economicus’. These are but three of the approaches used to explain citizens’ attitudes towards redistribution, but tend to be the main approaches scholars in the area use to explain the phenomenon.

The thesis has also focused on levels of generality, and it has been argued that measurements of support for the welfare state can be placed on different levels of generality and that how this is measured and operationalized impacts findings. Furthermore, it has been argued that these choices need further critical discussion to further our understanding of the role of values versus that of attitudes. The following will also focus on these aspects of redistribution, as it as a concept is measured both as a societal values through measuring citizens’ views on concepts such as equality as well as situational, through measurements of support for specific policies such as government’s responsibilities to provide jobs. Before entering into this discussion, the thesis discusses difficulties related to carrying out meta-analysis in the area.

**Meta-analytical difficulties**

Apart from providing an overview of included studies, systematic review may entail vote counting (a descriptive tool) as well as transformations of data into common comparable measures (e.g. meta-analysis). One of the main arguments here is that these tools are made difficult by the range of methods and measures used in the area of welfare attitudes, and is an issue researchers conducting systematic review in the Social Sciences need to approach with great caution so as not to lose the heterogeneity found in any specific area. As Sandelowski et al. (2007) argues “A continuing concern in the systematic literature is the often-cited ‘apples and oranges’ problem requiring researchers to decide whether they will treat two entities (e.g. apples and oranges) as one entity (fruit) or preserve the distinctions between them” (Sandelowski et al., 2007:7). The argument of this thesis is that the issues identified by Onwuegbuzie et al. (2003, p. 37) are so serious due to the nature of the studies in the area that we cannot calculate them as theories, design, types of methods etc. vary greatly. Thus, a range of other strategies is implemented. The issues raised by Onwuegbuzie et al. (2003, p. 37) in regards to calculating effect sizes are:

**“**(a) effect sizes can vary as a function of one’s research objective (i.e., theory application or effects application); (b) effect sizes can vary as a function of one’s research design and experimental conditions; (c) researchers can select from a variety of effect-size measures to argue different (possibly self-serving) points; (d) guidelines for interpreting effect size magnitudes are inconsistent and generally arbitrary; (e) effect sizes can vary as a function of sample size and sample variability; (f) effect sizes are sensitive to departures from normality; (g) effect sizes can vary as a function of the variability of the outcome measure (both between and within samples); (h) effect sizes can vary as a function of the reliability of the outcome measure; and (i) effect sizes can vary as a function of the scale of measurement used (i.e., nominal, ordinal, interval, ratio). “

Due to the above issues with effect-sizes, in the diversity of studies and the importance given to heterogeneity of studies to understand a complex phenomenon, we chose to adapt tools from Onwuegbuzie et al. (2003) who give studies values of 1, 0 and -1 depending on their effect to synthesise and understand which factors are found to have what kind of directional effects. Although there are suggestions in the literature on how to calculate effect sizes based on standardised betas taken from multiple regression models (Aloe, 2009) standardised beta’s are not commonly part of multilevel models (commonly used in attitude studies) nor always presented in the literature in the area, thus making use of these techniques almost impossible. Furthermore, the studies included here use a range of different types of regression models with different types of betas, making a meta-analysis using effect sizes even more difficult. As Onwuegbuzie et al. (2003) argues, it is important to be able to review and include studies in a way that enables clear synthesis providing a good overview of current knowledge. However, it is also crucial to go beyond this, and provide knowledge and synthesis that can further our understanding of what trends occur, when and what may explain these. The advantage of the approaches taken in this section is that we appreciate heterogeneity of studies, which is a dominant feature of this field, whilst still getting an understanding of effect directions as well as the prevalence of these.

Furthermore, as has been emphasised throughout, there will be an emphasis on confirming and building patterns of explanations in line with an explanatory approach, which provide a set of confirmed patterns of explanations of redistribution (building on Pawson, 2006). These may tell us what explanations may be valid in what situation instead of giving an overall, and homogenising, answer to ‘what works’. The following will provide a critical discussion of the concept redistribution. The latter is important, as one of the main findings of this project is a lack of appreciation of, and critical discussion of operationalization of measurements in the area.

**What is Redistribution?**

There is a range of different measures of and approaches to the concept of redistribution in welfare support literature. This section argues that the studies analysing redistribution are limited to an analysis of redistribution of income and economic measures and not other types of resources. Furthermore, this project argues that the concept needs to be operationalized more critically as one cannot necessarily take it for granted that redistribution is a clear measure for support for the welfare state. We need to critically discuss to what extent we can expect citizens to make the link between a welfare state in the form of a range of social programmes, benefits and services on one hand and redistribution on the other. Furthermore, building on levels of generality as a framework one can argue that the concept as operationalized in the area at the moment actually encompasses both societal and situational levels of generality. Thus, dependent variables also encompass both attitudes and values in many studies. This is because it is analysed through questions on specific policies and initiatives a state can take as well as views on values related to equality of a society. We also need to question critically whether we can take for granted that citizens make the cognitive connection between for example reducing income differences and the welfare state. One can also argue that rather than support for the welfare state, redistribution is a measure of a goal of one type of welfare state, one that in many ways is based on more socialist ideologies. In other words the question is; are we committing a fallacy by extrapolating support for government intervention in terms of income differences to a support for redistribution and as an end point support for the welfare state?

In his book on social concepts Goertz (2006) argues that it often has been the case that the measurements drive the operationalization in quantitative Social Sciences rather than theory and the process of conceptualisation. Here it will be argued that this to some degree is the case in the area of welfare attitudes as the operationalization is often directed by the available measures in surveys. Goertz (2006) argues that this is related to a difference in approach between quantitative and qualitative sciences as “qualitative scholars have been most concerned with concepts-which are generally seen as nonmathematical and deal with substantive issues- while quantitative researchers have focused on scaling, indicators, reliability, and other issues dealing with producing good quantitative measures” (Goertz, 2006, p.2). Looking at redistribution as an example of support for the welfare state, and of what Haller (2003) would categorise as a societal value, it can be argued that the concept is treated in a somewhat problematic way in many studies in the area of welfare attitudes. It is a concept about which there is little agreement when it comes to what factors influence individual’s attitudes towards redistribution, something that has been argued to be due to differences in the operationalization of the dependent variable (Jæger, 2006). Thus, an exploration of the impact of differences is important, and will follow here.

Overall, the focus in the area can be said to be on redistribution as a measure of redistributive policies and attitudes towards distributing resources (most commonly income) towards a deserving group of citizens (commonly a type of worker, most commonly those not in work) (Jæger, 2006; table 6.1**)**. It is thus assumed that citizens make a connection between income differences and the welfare state through a measure of the distribution of welfare (most commonly measured as income differences).

Of the measures used in the included studies (see table 6.1), we can divide the approaches to redistribution into different groups. Firstly, an institutionalised approach, where redistribution measures welfare support because “welfare regimes comprise not only formalised Social Policy arrangements, but also collective patterns of institutionalised solidarity and social justice beliefs“(Jæger, 2006, p. 159). In other words following this approach one would expect citizens to be socialised by and their norms to be influenced institutions, and more redistributive countries should display higher levels of redistribution. Another approach analyse redistribution by measuring citizens demand for redistribution. These are often scholars from political science and political economy, who see redistribution as citizens’ demand for insurance or equity explained by self-interest and risk exposure (Rehm, 2006; Finseraas, 2008). Risk can be driven both by structural drivers and inducers of risk, influencing the risk certain groups in society may have but is also based on an emphasis on the impact of self-interest on citizens attitudes, exposure and position relative to risk of being unemployed for example. All of the above, however, can be said to struggle with the same issue, they are not direct measures of support for the welfare state but rather a latent measure of characteristics that are more or less related to certain government roles and aspects of a society with a generous welfare state.

As has been argued the role of the government in providing jobs is one aspect studied that is unrelated to income, but yet is a focus in 3 of the included studies. However, (as seen in table 6.1) most studies include a question on income differences, and whether or not these should be decreased. Furthermore, and importantly the studies can be said to focus on specific rather than diffuse aspects of support whilst the concept of redistribution per se can be argued to be what Easton (1975) would define as diffuse. In the analysis we focus on how the different types of measurements, be they diffuse, specific or on different types of levels of generality impacts findings. However, it is important to note that a diffuse concept at societal level of generality often seems to be measured with a specific measurement and sometimes with situational indicators. Thus, there are questions measuring whether or not income differences should be reduced, whilst others emphasise and identifies the group towards which income should be distributed. Now, firstly this points to an emphasis on the economic aspect of redistribution rather than other factors that may be looked at and that often are emphasised such as equality of opportunities, which many also be related to non-monetary issues. This aspect can also be argued to represent a measure of certain values, what can be called social democratic values. Thus, redistribution may represent an operationalization of what one may expect from a more generous and ambitious type of welfare state, such as is exemplified by the social democratic welfare state regime. In other words, it is not to be expected that citizens in other types of welfare states necessarily support this kind of value. However, on the other hand, as has been found (Jæger, 2006) in societies where there are relatively smaller differences between rich and poor such as the Scandinavian countries one may also expect that citizens are less supportive of further redistribution than institutionalist theory would predict as further decreases in income differences may seem unnecessary.

From a theoretical and methodological point of view and in line with Goertz (2006) it is argued here that there needs to be more critical discussion of the ontology and the causal links assumed as well as the empirical evidence found. This project argues that redistribution, as a measure of welfare support, is problematic for a range of reasons. Firstly, because the fact that whilst it may be seen to represent citizens’ demand for a specific welfare state structure or the appropriate scope of a welfare state, one should be cautious with seeing it as a direct measure of welfare support. Not all authors claim that it is, however, most in the area use it as a measure of an aspect of support for the welfare state necessitating a critical discussion of the causal links between concept and measurement. Secondly, the focus on income shows the high emphasis on the economic aspect in this area when it comes to the aims and goals of the welfare state. However, it may also be important to other inequalities such as health inequalities, class differences as well as wellbeing, a measure now popularised and on the rise in the area. Thirdly, based on the studies included here, it is clear that there is little ontological and epistemological discussion involved when authors study redistribution, and a critical discussion of what is measured is needed. We cannot assume that we are measuring support for the welfare state through a measure of support for reducing income differences as this is based on the assumption of citizens having a clear link between income differences and the role of the welfare state. The latter may rather be seen as a representative of one type of welfare state, social democratic. Furthermore, the role of government in providing jobs may not reflect citizen conceptions of the welfare state. Further analysis such as latent class analysis should be carried out to determine to what extent these are measuring a dimension of welfare support, to what extent these are related to other aspects of welfare state support, and in that case which. This may help enhance our understanding of how redistribution attitudes vary and what may explain this.

## Table 6.1 Redistribution measures used

|  |  |  |
| --- | --- | --- |
| Redistribution measure | Surveys | Authors, year & Survey |
| Reduce income differences | 8 (ESS)  2 (ISSP) | ESS  Rehm (2007 and 2009)  Finseraas (2008 and 2009)  Jæger (2006 and 2007)  Mau & Burkhardt (2009)  Senik et al. (2008)  ISSP  Edlund (2003)  Mau (2002) |
| Reduce income differences between rich and poor | 3 (ISSP) | Edlund (1999 and 2003)  Cusack et al. (2006) |
| Reduce difference between high and low incomes | 3 (ISSP)  1 (German ZUMA survey) | ISSP  Linos & West (2003)  Kenworthy & McCall (2007)  Cusack et al. (2006)  German ZUMA survey  Dancygier & Saunders (2006)  Corneo (2000) |
| Gov. should increase tax on high incomes | 1 (ISSP) | Edlund (2003) |
| Incomes should be made more equal | 1 (WVS) | Verneby & Finseraas (2010) |
| Income and wealth should be redistributed towards ordinary working people | 1(British General Election Cross-Section Survey) | Dancygier & Saunders (2006) |
| Provide jobs | 1 (ESS)  1 (WVS)  1 (ISSP) | ESS  Rehm (2009)  WVS  Verneby & Finseraas (2010)  ISSP  Edlund (2003) |
| Gov provide basic income | 1 (ESS) | Rehm (2009) |
| Competition is harmful, it brings out the worst in people | 1 (WVS) | Verneby & Finseraas (2010) |
| Index |  | Edlund (1999)  Linos & West (2003)  Verneby & Finseraas (2010)  Svallfors (1997) |

The following will show how trends differ or are similar in studies using similar and different measures of redistribution. It will also discuss how this is so by analysing macro-level factors and on some key individual level variables used across measures to show how measurements, operationalization and levels of generality matter as well as of course to map what we know about the trends and what explanations are seen to be confirmed by analysing the findings in the included studies.

**Synthesis of trends in redistribution**

The following section discusses trends and patterns of explanation by types of measurements of redistribution to highlight issues around operationalization, as well as to build on the patterns of confirmed explanations identified in the literature review focussing on levels of generality. Rather than giving a narrative review, the following focuses on directional effects at macro and micro level (indicated by 1 for a positive effect and -1 for a negative) to illustrate the use of adapted systematic review and realist synthesis tools with an emphasis on how these can help enhance our understanding of the trends in the area.

The below (table 6.2) shows the range of research questions asked in the area. As already argued most studies focus on redistribution of income, some towards certain identified groups (situational and specific measurements) whilst others operate at a more diffuse and societal level. It has also already been mentioned that the scholars tends to focus on the economic distribution rather than other types of resources. As with the other dependent variables and outcomes ISSP and ESS are the two most commonly used surveys.

Related to the choice of redistribution is of course the research questions aimed to be explored in studies. From the below it is clear that there are two macro-level occurrences that have received more focus by scholars in the area, the impact of immigration (5 studies) and welfare state regime type (3 studies) on attitudes towards redistribution. 3 studies explore variations in redistribution taking into account welfare state regime differences. Other aspects focused on are levels of inequality, and risk exposure. Overall, it scholars are interested in understanding how a range of welfare pressures may impact citizens’ attitudes towards redistribution.

## Table 6.2 Overview of Research questions

|  |  |
| --- | --- |
| Author& year | RQ |
| Edlund (1999) | "This article analyses attitudes to redistribution and financial cheating in Norway and the USA" (abstract) |
| Finseraas (2009) | "This article returns to preferences and explores how people's preferences for redistribution-the demand for redistribution-is related to inequality" (p.95) |
| Jæger (2006) | The article explores whether or not "welfare institutions, policies and legacies are not systematically related to levels of support for redistribution in the Western, industrialised world?" (p.158). The emphasis is put on explaining why there has been a disagreement amongst scholars as to whether or not this is true. |
| Jæger (2007) | "Are subjective measures such as left-right position really causally related to welfare attitudes? This problem of causal inference has gone largely unnoticed in the literature but is of fundamental importance to the growing body of studies treating different types of subjective measures as causal determinants of welfare support. In this paper I address the theoretical, interpretational, and empirical problems that arise when treating subjective measures as causal predictors of welfare support and propose a new analytical approach" (p.4) |
| Rehm (2009) | "This article aims at making three contributions. First, it draws attention to the necessity of testing the assumed micro assumptions of our macro theories…Second, the article argues that many of the existing theories about the formation of redistributional preferences rely on a logic of preference formation that is not entirely convincing. Almost all political economy contributions conjecture that developments within and individual's industry are shaping her or her redistributional demand. In what may seem to be a small contrast-but it is argued to make important differences-this article proposes that an individual's occupation, especially risk exposure related to someone's occupation, shapes redistributional preferences. Third, this article subjects some competing arguments within the political economy literature on the determinants of redistributional demand to empirical tests and thereby combines the all too often disjoint literatures of comparative political economy and political behaviour" (p.856) |
| Linos & West (2003) | "How do different people in different countries want welfare states to function? Do public opinion data match our theories of welfare state, and can such data help us develop our thinking?" (p.393) "In this paper, we critique and extend Svallfors' analysis, arguing that his overall conclusion of similarity in the structure of public opinion across welfare state regimes rests upon a problematic treatment of missing data and a poor operationalization of the theoretical determinants of public opinion" (p. 394) |
| Kenworthy & McCall (2007) | "What happens when market inequality is high or increases? Does government compensate with high redistribution in order to secure a relatively egalitarian distribution of post-tax-post transfer income?" (p.35) Study demand for redistribution to explore these mechanisms are "more market inequality thus leads to political demand for more generous redistributive policy" (ibid) |
| Dancygier and Saunders, 2006 | Study immigrant political behaviour in two European countries hosting large migrant populations: Germany and GB. Ask whether immigrants have the same distribution of preferences on key issues such as the welfare state (spending and redistribution) as comparably situated natives and secondly exploring determinants of immigrant partisan identification in GB. |
| Mau and Burkhardt, 2009 | How do migration and ethnic heterogeneity affect welfare state solidarity |
| Senik et al., 2008 | "We want to find out (1) how the perceived presence of immigrants is related to natives 'support for the welfare state, and how this relationship varies (2) with natives' attitudes toward immigrants, and (3) across countries" (p.346) |
| Verneby and Finseraas, 2010 | Assess impact of the anti-solidarity (if citizens are xenophobic their support for the welfare state will diminish) means that xenophobia affects egalitarianism which then impacts left voting and policy-bundling effects which would mean that xenophobia has a direct effect on left vote (the right is more conservative on issues of multiculturalism thus voters who on economic issues would have voted left are willing to trade off redistribution views against their negative views of immigrants). Dependent variable is left vote where 1 = respondent would vote for a left party as his or her first choice |
| Crepaz chapter 3 in Kymlicka and Banting, 2006 | "How widespread is public support for multiculturalism policies? And what is the impact of the adoption of MCPs on public support for the welfare state?" (abstract) |
| Edlund (2003) | "The purpose is to analyse the extent to which these institutional differences have left their imprint on the ways men and women in conjugal families define their identities and political attitudes in class terms. Attitudes are examined across three relevant areas: class identity, political party preferences and attitudes towards state redistribution" (p. 196) |
| Cusack et al. (2006) | Provides a systematic account of the interaction between exogenous shocks, popular demand for compensation and government responsiveness to such demand (p.366) |
| Finseraas (2008) | Explore relationship between perceptions of immigrants and redistribution support |
| Crepaz (2008)- | "The purpose of this book is to examine the validity of this extrapolation from the American to the European context and to probe whether such an 'Americanisation of the European welfare state' is indeed occurring as a result of immigration-induced diversity" (p.3) |
| Mau, S in Glatzer (2002) | "This paper will concentrate on the way the public perceives and frames the principle of redistribution in Britain and Germany." (p.218) |
| Corneo 2000 | The current paper aims at exploring the distinctive forces that drive citizens' preferences for political redistribution in the U.S. and Germany, distinguishing within the latter between West Germany and East Germany' (p.1); Test whether 'homo economicus', 'public values' or social rivalry' best explain these preferences |
| Rehm (2007) | What determines individual level support for income redistribution by the government? |
| Svallfors (1997) | “This paper attempts to link these two research fields in an analysis of how attitudes to redistribution are structured in various welfare state regimes” (p. 284). “Attitudes among the populations of these countries are analysed to detect a) the overall support for state intervention and redistribution in the various countries; b) the range of income differences that are considered legitimate in various countries, and c) what social cleavages are dominant in structuring attitudes” (p.284) |

An overall finding for redistribution is that we do not find as high a level of support across countries as we do for government responsibility. Starting off with the effect of macro-variables on support for redistribution, it is clear that the welfare state regime type explanations find support across the two major groups of outcome measures where authors have included macro level factors in their statistical models. However, it also seems clear that immigration is found to have a negative impact on support for redistribution. Furthermore, studies using indices do not seem to include macro level variables of inequality, unemployment, immigration nor GDP. Scarcity and self-interest explanations are supported by effects found across two types of welfare pressures when it comes to effect of unemployment rates, inequality, immigration and GDP. We could also argue that reducing income differences is closer to a societal value whilst the indices is a mixed measure in terms of levels of generality, and thus we see that there are differences in finding depending on the level of generality.

## Table 6.3 Directional effects of macro variables on redistribution

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Context variables:** | **Regime** | **Inequality** | **Immigration** | **GDP** | **Unemployment rates** | **Social expenditure** |
| **Redistribution measure** | **Reduce income differences** | **Anti-solidarity effect (those neg. to Immigrants more neg. to redist.)**  **Nordic countries -1**  **Latin 1**  **Liberal -1**  **Sweden & Norway 1** | 1\*1 | **Immigration levels 2\*-1**  Religious fractionalisation 1\*-1 | **1\*1** | **1\*1**  **1\*1** | **Public social exp. 1\*-1**  **Share of benefits in kind 1\*-1**  **Net replacement rate 1\*-1**  **Family benefit exp. 1\*-1**  **Share of family services 1\*1** |
| **Index** | **Liberal 1\*1**  **1\*-1**  **Moderate 1\*1**  **Radical (Oceania) 1\*1**  **Social dem 1\*1**  **Conservative 1\*-1**  **1\*1** |  |  |  |  |  |

Calculations based on significant effects found in analysis. \* denotes times, -1 a negative effect on support measure and 1 a positive. E.g. 3\* -1 means 3 studies with a negative effect.

Effects that are not significant are not included.

Colour scheme by pressure addressed by research question in book/article: Immigration; Left right; Risk; Regime; Inequality; Class; **Bold = total across**

Table 6.4 shows effects of some key independent variables at individual level. These are key independent variables included in most studies. In the table we see that there are similarities in the pressures on welfare identified in these studies. Furthermore it is also clear that different scholars include different individual level variables, and that there are variations in effects found across pressures and measurements. Welfare pressure, measurements and level of generality matters to some extent for findings. First of all it seems that self-interest explanations gain support by the positive effects identified for age, income, unemployment, and unskilled as well as for women. Education seems to have a positive effect on support for redistribution when immigration and regime type is taken into account, but a negative effect when risk and left-right placement is taken into account. In other words the socialising effects of education seem to be particularly important as a positive effect when it comes to immigration. Union membership and left-right placement supports explanations where values and normative orientations are seen as important explanations for higher support for redistribution.

## Table 6.4 Micro variables directional effects on redistribution

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Age | Gender | Edu. | Income | Union member | Unemploy. | l-R | Skilled | Unskilled | Self-employed |
| Reduce income differences | **Total: 5\*1**  By pressure:  *2\*1*  *1\*1*  *1\*1*  *1\*1* | **Total: 2\*-1**  **5\*1**  By pressure:  *1\*1*  *1\*-1*  *1\*-1*  *1\*1*  *2\*1* | **Total: 3\*-1**  **3\*1**  By pressure:  *1\*-1*  *1\*-1*  *2\*1*  *1\*1*  *2\*-1* | **Total: 4\*-1**  **1\*1**  By pressure:  *1\*1*  *1\*-1*  *2\*-1*  *1\*-1* | **Total: 4\*1**  By pressure:  2\*1  1\*1  1\*1 | **Total: 4\*1**  By pressure:  1\*1  1\*1  1\*1  1\*1 | **Total: 2\*1**  By pressure:  1\*1  1\*1 | **Total: 2\*1**  By pressure:  1\*1  1\*1 | **Total: 2\*1**  By pressure:  1\*1  1\*1 | **Total: 1\*-1**  **2\*1**  By pressure:  1\*1  1\*1  1\*-1 |
| Reduce diff. betw. high and low incomes |  | **1** |  | **-1** | **1** | **1** |  |  |  | **-1** |
| Income and wealth should be redistributed towards ordinary working people | **1** | **-1** |  | **1** |  | **1** | **-1** |  |  |  |
| Index |  | **Total: 3\*1**  By pressure:  *3\*1*  *1\*1* |  | **1\*-1** |  | **2\*1** |  |  |  | **3\*-1** |

Calculations based on significant effects found in analysis. \* denotes times, -1 a negative effect on support measure and 1 a positive. E.g. 3\* -1 means 3 studies with a negative effect.

Effects that are not significant are not included.

Colour scheme by pressure: Immigration; Left right; Risk; Regime; Inequality; Class; **Bold = total across pressure (included when there are more than 1 pressure)**

Overall, when investigating the importance of self-interest explanations in understanding the effect of macro level independent variables we find some support. This is so in the area of levels of inequality in Corneo (2000) and Finseraas (2009), when focusing on risk in Rehm (2007; 2009) and Cusack et al. (2006), and in relation to immigration where those at risk of loss are more negative to redistribute to immigrants (Finseraas, 2008). At the individual level there are also some studies that find support for self-interest explanations; these are Mau and Glaetzer (2002), Edlund (1999) and Linos and West (2003).

The other strand of explanations that is supported by findings is that of the influence of national context. Even studies not finding support for welfare state regime type of explanations find that attitudes vary by national context, and thus context matters. Several studies in this area do however find that support for redistribution does vary between welfare state regime types. Social-democratic types have higher levels of support, followed by conservative and lastly liberal regimes (Edlund, 1999, 2003; Jæger, 2006; Linos & West, 2003; Svallfors, 1997). Thus, we can conclude that context matters, and depending on the measure, welfare state regimes matter. However, the latter is less the case when it comes to understanding the impact of immigration on support for redistribution.

Another strand of explanations, socialisation and normative orientations, seem to be important mostly when it comes to immigration and comes out in particular with the importance of education is considered as seen above. Furthermore, normative orientations measured as values are important, as also discussed on other outcomes where support for social equality was seen to be important for support for government responsibility. Here it is found that left-right placement is important (Jæger, 2007; Cusack et al., 2006), and as we have seen both this and union membership may be seen to represent a specific normative view that is found to impact support for redistribution. In the area of immigration, negative attitudes towards immigrants are associated with negative views on redistributing to immigrants. Furthermore, Linos and West (2003) find that beliefs about social mobility impact attitudes towards redistribution.

Interestingly when it comes to the impact of inequality at a macro level we have 3 studies making use different measurements of redistribution. Finseraas (2008) uses ESS’ question on reducing income differences, whilst Kenworthy and McCall (2007) and Corneo (2000) use ISSP’s question on reducing differences between high and low incomes. Their findings show that in Corneo (2000) and Finseraas (2009) higher levels of inequality lead to higher demand for redistribution, whereas Kenworthy and McCall (2007) show that as a political outcome this does not lead to more redistributive policies. Thus, again, the impact of welfare pressures may differ depending of the choice of dependent variable.

**Conclusion**

Overall, a complex picture has been identified when it comes to explaining attitudes towards support for the welfare state. It seems that the conception of a ‘political man’ (Larsen, 2006; 2008) that is influenced and socialised by institutions and frameworks, and whose self-interest is adapted to these factors may be the explanation that overall receives most support. The in-depth analysis of redistribution, findings shows that trends vary not only between welfare pressures studied but also by the measures used to operationalize redistribution. Thus, it is argued that it is crucial to understand differences in findings by measurement of support for the welfare state, as welfare states face a range of different pressures. We have seen that, depending on pressure, different effects may be found of levels of inequality and unemployment rates, this also depend on the measure of support for the welfare state used. This is important to have in mind as different external pressures on welfare states are found to impact support for redistribution. Relating the findings in this chapter with those in the previous chapter it is argued to support the differentiation between different levels of generality as for example immigration has a weak negative impact on redistribution at the societal level, whilst a situational level measure such as concern has a positive impact of immigration. Thus, the relationship between macro level factors and support for the welfare state depends on the measure used. The study underlines the importance of interaction and mediation as macro and micro level variables impact each other, explained by theories such as that of the ‘political man’. The finding of this study thus supports the claims that levels of generality matter and that support varies according to types of attitudes measured.

# Chapter 7. Support for the welfare state in ethnically diverse welfare states.

*‘I am a part of all that I have met’ (Alfred Tennyson)*

**Introduction**

The focus of this chapter will be on immigration and support for the welfare state. In this area, one dominant school of thought, which builds on arguments put forward by American scholars, underlines the importance of the degree of ethnic heterogeneity in explaining why the population in some countries support welfare policy while others are more reluctant (Alesina & Glaeser, 2003). Their argument is that cultural diversity has a negative effect on the generosity of welfare as it weakens social ties and feelings of a common identity that laid the ground for encompassing welfare arrangements (Van Oorschot, 2008). On the other hand some argue that immigration may have a positive influence on support in accordance with cultural theory where increased diversity widens people’s horizons and makes them more accepting of other cultures (ibid). On this basis and given the a lack of consensus on effects found in Europe, combined with a high number of studies produced, the area represents a good ‘test ground’ for the use of systematic review. As with redistribution, analysed as a measure of support for the welfare state in the previous chapter, immigration, a welfare pressure, is used to illustrate the use of systematic review and realist synthesis, with the aim to enhance our understanding of the dynamics at play. Furthermore, it is shown how narrative review approaches from systematic review can be combined with identification of directional effects. These synthesis approaches are combined with an emphasis on what explanations are found to be confirmed in the studies, thus assessing and testing theoretical approaches.

In the area of support for welfare and immigration, much emphasis has been put on testing and evaluating whether findings from the USA (e.g. Alesina and Glaeser, 2003) predicting a negative influence of higher ethnic diversity on support for the welfare state are replicated in other parts of the world. Thus, the focus of all the studies is on effects of either level of immigration or another measure of ethnic fragmentation and/or attitudes towards immigrants on a measure of welfare support. This is important to note from a methodological point of view, and is related to the general argument of the thesis of a need for critical discussions around operationalization, as immigration and ethnic diversity can be argued to be two different concepts, and this is an area that should be further explored in future research. It is particularly important as the experiences from the USA, on which much research is based, reflect longer standing ethnic diversity in a society and not newer immigration mixed with the same type of older immigration we find in Europe. This chapter, as the previous one, will demonstrate the need for researchers to critically discuss their operationalization process and measurements of immigration and ethnic diversity.

The chapter follows from the previous and will emphasise issues around operationalization, as this has been identified as an important way in which the use of SR can contribute to enhance our understanding. There will be a focus on levels of generality as framework of analysis, to map and relate studies to each other and help those seen as being contradictory to ‘talk’ to each other. The structure of the chapter will be; a brief discussion of some common explanatory approaches in the areas, then a discussion of operationalization of immigration, followed by a discussion of main effects and trends in the area by use of adaptive ways of synthesising evidence by macro and micro level effects and level of generalities. The chapter will explore various adaptations of more traditional synthesis methods from the systematic review tradition to show how this may be used in the area of welfare support as well as to provide further understanding of what we know and do not know about the impact of immigration and ethnic diversity on welfare support.

**Immigration and welfare support**

Immigration is one of the key social changes bearing on social, political and economic issues for many countries. The following will give a brief overview of some of the common approaches to analysis of the relationship between immigration and support for the welfare state. As in the chapter on redistribution these will only provide examples of expected effects and approaches to analysis of immigration and support for the welfare state rather than being a full literature review as the analysis also provides an overview of the field.

As previously mentioned, one school of thought dominated by American scholars, and a starting point for research in Europe, underline the importance of the degree of ethnic homogeneity when explaining why the population in some countries support welfare policy while others are more reluctant (Larsen, 2008; Alesina & Glaeser, 2004). Their argument is that cultural diversity has a negative effect on the generosity of welfare. Building and related to these types of negative effects some sociological explanations often emphasise that increased immigration in Europe may potentially weaken the social ties and feelings of a common identity that laid the ground for encompassing welfare arrangements (Van Oorschot, 2008).

Ethnic heterogeneity, exemplified by authors such as Alesina and Glaeser (2004) and others based on the American experience, is one of several theories aiming to explain relations between migration and attitudes to welfare. Amongst other mechanisms that are seen to explain a relation between immigration and potentially declining support for the welfare state are: multiculturalism, costs of immigration and competition over welfare, welfare state chauvinism, differences in work ethic between immigrants and the native population; institutional change and the emergence of an ethnic ‘underclass’”(Goul-Andersen, 2006, p.1). Another school of thought emphasises institutional structures and claims that “attitudes toward welfare policy can be (partly) explained by cross-national differences in the institutional structure of the different welfare regimes” (Larsen, 2008, p.146). Furthermore some argue there a link between the rise of right-wing politics and immigration, which can reinforce ‘us’ versus ‘them’ resentment (Van Oorschot, 2008). Others argue that left-wing politics “substantially counteracts the impact of greater diversity on the European social model” (on Taylor-Gooby (2005) quote from Van Oorschot, 2008, p.5) and some argue that a comprehensive welfare state forms a barrier against diversity-based retrenchment.

Based on previous studies, I expect the research synthesis to show that an increase in immigration will influence attitudes to welfare in a negative way, as Van Oorschot (2008) found that “the informal solidarity Europeans feel towards migrants is low, when compared with solidarity shown towards other vulnerable groups” (Van Oorschot, 2008, p.12). However, it is also expected that welfare state arrangements work as a barrier and may ward off possible consequences, and thus that the more comprehensive welfare states may experience less negative effects of diversity. In addition it may be important to look at the ethnic diversity and multiculturalism at the point of establishing a welfare state; “Once built, institutions are resistant to change. Institutions have a strong impact on perceptions, norms and values. Thus it would seem likely that reactions to immigration are different in different welfare states” (Goul Andersen, 2004, p. 6). As Goul Andersen (2004) I am sceptical to a mechanical use of the American experience as a predictor of European trends. This is because Europe has seen a long process of diversification and break with tradition (Goul Andersen, 2004, p. 7) and changes have been absorbed by the European society rather than resulting in great cleavages and decreased support for the welfare state. As a result a competing hypothesis of findings would be that immigration rates have “no influence on relative solidarity towards migrants, and even that a higher rate of foreign-born citizens goes together with higher relative solidarity” (Van Oorschot, 2008, p.12). As in the previous chapters, the findings will be analysed by use of levels of generality to assess whether different effects are found on support for the welfare state on different levels of generality.

**Measuring immigration and ethnic diversity**

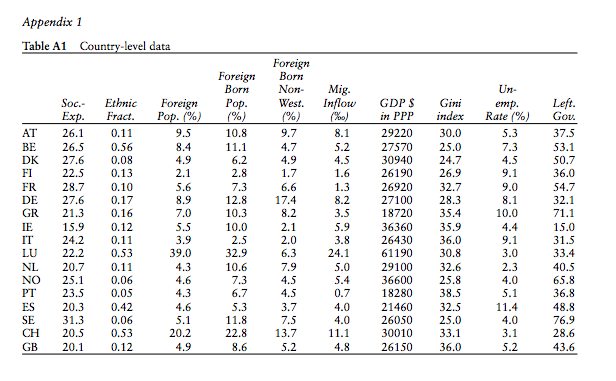
The previous chapter had an in-depth discussion of an outcome variable, redistribution; here I will critically discuss the operationalization of the concepts of immigration and ethnic diversity in the area. This is important as the measures of immigration and ethnic diversity are wide-ranging and varied, and the measurement used matters for what we find. Where some authors such as Mau and Burkhardt (2009) and Van Oorschot (2006; 2008) consider a variety of measures, others seem to put less emphasis on the measurement used. However, and importantly, studies including several measurements of ethnic diversity find that it yields different results (Mau & Burkhardt, 2009). This means that the choice of measurement may be crucial in influencing findings and thus should be critically discussed and assessed in any study in this area. For an overview of the measurements and effects used in the included studies on immigration, see below.

Alesina and Glaeser (2004), a point of reference for many in this area, do not spend much space discussing the ethnic diversity variable used. However, Alesina et al. (2003) develop the much-criticised measures of fractionalisation that they use (critics include Kymlicka & Banting, 2006). Fractionalization as used by those authors measures degree of fragmentation, and reflects “the probability that two people, drawn at random from the population, will be from different groups’. It varies between 1 (everyone from a different group) and 0 (everyone from the same group)” (Taylor-Gooby, 2005, p. 664). Alesina et al. (2003) also provide two other variables, linguistics and religious fractionalization, however, the ethnic aspects have been emphasized as particularly important in relation to the welfare state (Alesina & Glaeser, 2004). Some have highlighted problems with the fractionalization measures developed by Alesina et al. (2003), a view shared by this thesis. These include issues around validity, the source of the data and the adequacy of “a synthetic index of fractionalization” (Mau & Burkhardt, 2009, p.216). Furthermore, Kymlicka and Banting (2006) argue that Alesina et al. (2003) are inconsistent in their treatment of national minorities and indigenous peoples.

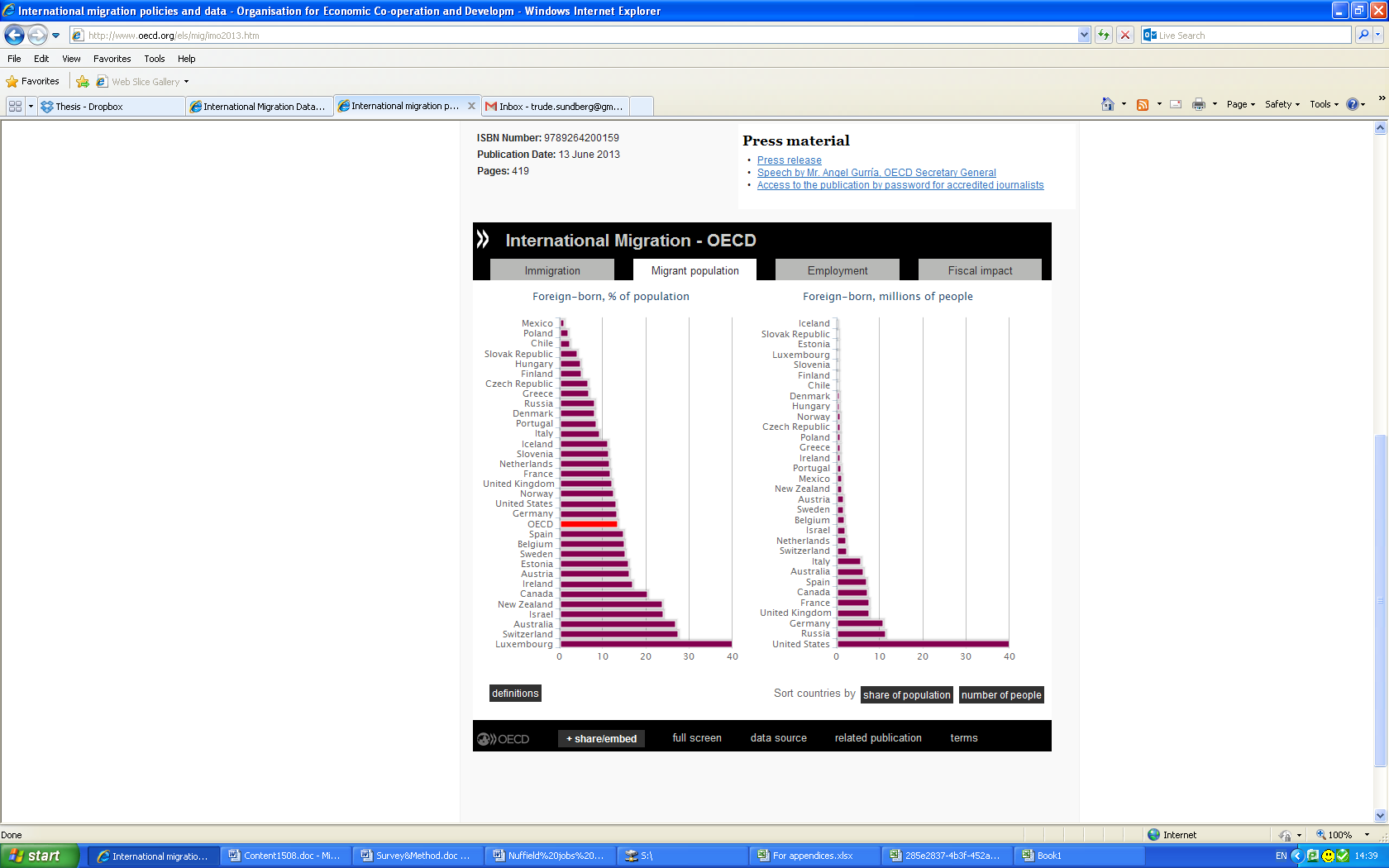
The importance of critically discussing the measurement of immigration and ethnic diversity is paramount as Alesina and Glaeser (2004) argue strongly for a general causal mechanism. As such, it is crucial to understand at what point and with what type of immigration or ethnic diversity said mechanism comes into play. I have argued elsewhere (Sundberg, 2011) that timing and a greater understanding of differences between different types of immigration (e.g. European immigrants versus non-Western immigrants versus asylum-seekers) is crucial. In addition to these aspects it is important to analyse the difference in impact between shares of immigrants relative to the majority population and levels of immigration at a given point in time. As seen above, these differ. This also includes an understanding of whether there is a difference between new inflows of immigrants and more established ethnic diversity in a society. The latter can be seen as a consequence of a country’s longer standing history. This project argues that the ethnic fractionalisation variables used by Alesina and Glaeser (2004) can be seen to represent long-standing ethnic diversity, and be less suitable to measure the sizeable ethnic minorities and immigrants such as asylum-seekers, which are relatively recent phenomena in Europe (Meuleman et al., 2009).

As can be seen in figures 7.1 and 7.2 different countries come out differently when we use different measures. Belgium, as an example, is an ethnically fragmented country if we make use of Alesina et al. (2003), but not if we use a measure such as the percentage of the population being non-western Foreign born. Thus, it is crucial that in order to fully understand the impact of immigration as a phenomenon, authors problematize and critically discuss why they make use of the measures they do and the consequences these choices may have on findings. This is also important because there may be different attitudes associated with different types of immigrants. There may, for example, be differences in the extent to which different groups of immigrants use welfare benefits or are associated with stereotypes such as the one found in the USA. In the USA, the association between the poor and laziness has been seen to play a crucial role in explaining the importance of race and its impact on support for a redistributive welfare state (Alesina and Glaeser, 2004). It is therefore argued that studies should pay attention and discuss the measurements used and how impacts may differ over time as immigrants are established (through segregation/assimilation etc.) in a society.

Figure 7.1 Immigration and ethnic diversity measures used **(**Mau and Burkhardt, 2009, p.226)



## Figure 7.2 OECD statistics on Foreign born population



<http://www.oecd.org/els/mig/imo2013.htm> 15 august 2013

Below is an example of the variety of measurements used as well as how the findings vary according to the measurement used. It is important to underline the lack of critical and sufficiently in-depth discussions of which measurement to use when studying immigration and ethnic diversity, albeit with some exceptions. This is important to note from a quality point of view, as immigration and ethnic diversity can be argued to be two different concepts. However, as long as the authors critically discuss this and are aware of these issues around immigration and ethnic diversity, it may be assumed that they are interested in understanding slightly different aspects of the relationship. It is also important from a theoretical and explanatory point of view as we need to embark on a critical operationalization process to properly understand the mechanisms at play and their explanations. Thus, this is an area that should be improved and explored in future research. It is particularly important as the experiences from the USA, on which much research is based, reflects longer standing ethnic and above all racial diversity in a society. In other words it is not based on the newer immigration mixed with older immigration trends that we find in Europe. Furthermore, as race has been important in the US case, one may want to discuss and take into account the distance, cultural and linguistically, between the different ethnicities in a society, both newer and older immigrants and culturally as well as in terms of skin colour. These aspects may be deemed important due to degrees of ‘otherness’ and closeness to majority identity, which is highlighted in for example in deservingness theory (Larsen, 2008). In addition to paying attention to the immigration and ethnic diversity measures, as well as the time aspect, it is also argued that to understand how this may interact with other macro and micro level variables such as welfare state regime and socio-economic characteristics is crucial. Researchers need to critically discuss what their operationalization is measuring.

## Table 7.1 Immigration measures

|  |  |
| --- | --- |
| **Author** | **Immigration measures** |
| Van Oorschot and Uunk in Mau and Veghte (2007) | Relative size of immigrant population measured as rate of foreign-born citizens based on an OECD report has no significant effect on conditionality of solidarity |
| Van Oorschot (2008) | Ethnic fractionalisation; Language fractionalisation; Religious fractionalisation; Rate of foreign-born citizens; Immigration rate  Only two significant and positively related to relative informal solidarity towards immigrants |
| Van Oorschot (2006) | Includes attitudes towards immigrants at individual level (a scale combining the questions “feelings towards immigrants combining answers to the questions of whether people would not like to have immigrants as neighbours and whether they agree that in scarce times employers should give priority to nationals over immigrants. A second measure is whether people would like to restrict the inflow of new immigrants strongly, or not at all” (Van Oorschot, 2006, p.30). |
| Dancygier and Saunders (2006) | Include measurement of per cent minority and immigrant\*per cent minority at individual level, however it is unclear how exactly this is measured. Neither is statistically significant. |
| Crepaz (2006) | Uses percentage foreign population and find a negative effect of the measurement on the dependent variable; people should take more responsibility to provide for themselves. |
| Cruthfield and Pettinicchio (2009) | Includes percentage total immigration in their ‘others’ measurement and find that more unequal and diverse societies have stronger ‘taste’ for inequality. |
| Senik et al. (2008) | Perceived share of immigrants at individual level only significant on help the poor and has a slightly negative impact. |
| Koning (2011) | Share of immigration population, but doesn’t emphasise this in analysis. Rather focus on individual level variables towards immigrants that seem to have mixed effects in their bivariate analysis that should be strengthened. |
| Van Oorschot and Uunk (2007b) | Use percentage of foreign born but do not find it to have a statistically significant effect on relative concern for immigrants. |
| Finseraas (2008) | Opposition to social rights for immigrants negatively related to support for redistribution |
| Verneby & Finseraas (2010) | Includes an individual measurement of xenophobia which has a negative influence on left voting |
| Mau & Burkhardt (2009) | Includes a range of measures all of which are negatively related to support for redistribution; percentage foreign born population, foreign population, foreign born non-western population, migration inflow |
| Crepaz (2008) | Includes attitudes towards immigrants at individual levels (immigrants take jobs away; average salaries are brought down by immigrants) which have a negative effect on ‘Government should take measures to reduce income differences’ (Crepaz, 2008, p.82). Creates a variable by use of PCA called native resentment which has a positive effect on ‘people/government should take responsibility’ but a negative effect on ‘society should eliminate inequalities’ (Crepaz, 2008, p.87). He also looks at welfare chauvinism, in other words views of immigrants and their social rights and finds that foreign-born population is not statistically significant when welfare chauvinism is dependent variable. He also finds that changes in foreign-born population have a negative impact on redistributive attitudes (Crepaz, 2008). Using another measure, multicultural policies, not used by other studies, he also finds that multicultural policies have a positive impact on attitudes about the welfare state (ibid). |

As can been seen from table 7.1 there are a range of different measures used, and there is also not enough consideration given to what measures are used and what the consequences of this may be on findings. In the following, I will discuss the impact of using different measures on findings in the area. For now, it is important to underline that there seems to be little agreement in terms of which measure of immigration to be used on a macro level. In particular, I find a difference between the measures used by Alesina and Glaeser (2004), their measures do not yield the same results in the European setting, and scholars use a range of measurement. Thus there is a different approach applied by scholars in the European setting. As highlighted in the quality appraisal chapter, some studies do not include a critical and clear discussion of their measurements, further complicating the interpretation of these and strength of their findings. The following will take these aspects into account as we analyse the findings in the included studies.

**Impact of immigration in changing welfare support**

Overall, the following will show how levels of generality make a difference and can help explain differences in impact of immigration on support for the welfare state. In addition we shall see that different types of measures have different effect. Contact theory appears to explain positive effects of immigration on concern for the living condition of needy groups on a macro-level whilst self-interest, as in the previous chapter, is found to play an important role at the individual level. Furthermore, socialisation at the individual level measured by education seems to be more important when it comes to mediate the relationship between immigration and support for the welfare state than when it comes to other welfare pressures. Again, then, as in the previous chapter, we find evidence for a ‘political man’ as citizens react and are shaped by a framework and respond to their changes.

Table 7.2 shows the direction (1 for positive, -1 for negative or 0 for no effect) of the effects found to be statistically significant within and across the 13studies. This is the same approach taken in the previous chapter when analysing redistribution and analyses effect of immigration and ethnic diversity separately for societal and situational levels of generality. The project here assumes that redistribution is at societal level of generality, despite measurements sometimes focussing on specific objects. This is done to explore and try to distinguish any differences by measurement but could lead to a finding that there are no differences as some measurements would be at the same level of generality. Empty cells mean that the variable was not included in a study. An advantage of systematic review synthesis over a traditional literature review can be argued to be that it produces systematic overviews within and across studies’ findings. This enables researchers to see the evidence and the relation between evidence in new ways. Here I find that by dividing into effects of immigration levels on different measures of welfare support we see that levels of generality and support for the welfare state measure matters.

Higher levels of immigration are found to have a positive and socialising effect on concern for immigrants in the studies making use of this outcome measure. However, it has weakly negative effects on attitudes towards redistribution and a negative effect on inequality. Importantly, the effects that are found significant in studies using several measures are shares of foreign born. This allows us to compare the effects across the different studies, in other words we can analyse the effect of this measurement on different measures of support for the welfare state. As can be seen in table 7.2 there are different effects depending on the level of generality. From this we can argue that the level of generality of support for the welfare state measure matters.

Building on the discussion in previous chapters we can argue that redistribution is a societal measure that can be expected to change more slowly than a situational level attitude such as concern for the needy. Here, as discussed in the literature review, societal values are values specific to social contexts such as equality, thus redistribution, whilst being situational, includes attitudes towards specific groups such as immigrants. Thus, one may argue that it is important to pay attention to whether or not this may change over time. In other words whether the slightly negative effect found on redistribution may change as there is more contact between different groups, and the immigrant populations get more established.

## Table 7.2 Directional Effects of key variables on welfare support

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Author & Year | Immigration levels | Att. To immigration/immigrants | Age | Female | Edu. | Welfare support measure |
| Dancygier and Saunders (2006) |  |  | 1 | -1 |  | Redistribution, Spending on welfare states |
| Finseraas (2008) |  | -1 | 1 | -1 | 1 | Redistribution |
| Mau and Burkhardt (2009) | -1 (weak) |  | 1 | -1 | 1 | Redistribution |
| Senik et al. ( 2009) | -1 (weak perceived levels) | -1 |  |  |  | Redistribution; Equal opportunity, support for poor’s’ basic needs |
| Verneby and Finseraas (2010) |  | -1 | -1 | -1 | -1 | Redistribution |
| Crepaz (2006) | -1 (weak) |  | 1 | 1 | 1 | Redistribution; Trust |
| Crepaz (2008) | 0 (of foreign born)  0 Multicult. policies |  |  |  | 1 | Redistribution |
| Van Oorschot (2008) | 1 |  |  |  |  | Concern for specific groups- immigrants |
| Van Oorschot (2006) |  | -1 | -1 | -1 | 1 | Concern for specific groups  Conditionality of solidarity with specific groups |
| Koning (2011) |  | -1 |  |  |  | Concern for specific groups- immigrants |
| Van Oorschot and Uunk, (2007a) | 1 | -1 | -1 | -1 | 1 | Concern for specific groups- immigrants |
| Van Oorschot and Uunk, (2007b) | 1 | -1 | -1 | -1 | 1 | Concern for specific groups- immigrants |
| Crutchfield & Pettinicchio, 2009 | -1 |  |  |  |  | Inequality |

Calculations based on significant effects found in analysis. \*denotes times, -1 a negative effect on support measure and 1 a positive. E.g. 3\* -1 means 3 studies with a negative effect.

Effects that are not significant are not included.

An overall and strong finding of this synthesis is that negative attitudes towards immigrants are negatively related to support for the welfare state. This is an important finding for European attitude research as negative out-group perceptions of other ethnicities is a fundamental part of the American experience (Alesina and Glaeser, 2003). Importantly, we also see how these negative attitudes, consistent across studies, may impact voting, through policy-bundling effects according to Verneby and Finseraas (2010). In other words, attitudes are found to impact how people say they will behave. An aspect that becomes important to discuss as a result of this is whether or not there is an interaction between higher levels of immigration and more negative attitudes towards immigrants. In addition, Koning (2011) finds that welfare chauvinism (keeping benefits to our own) does not necessarily correlate with immigration levels, something that is important to have in mind. The reason for the importance of these findings is that it sheds some light on whether higher levels of immigrants lead to more or less negative attitudes to immigrants. However, he does not carry out any multivariate analysis of the relationship. Furthermore, Senik et al. (2008), studying differences between natives and immigrants’ attitudes, finds that whilst some, based on welfare magnet arguments, may expect immigrants to be more positive towards the welfare state, immigrants are slightly more conservative than natives but adapt within one generation. In other words, there is no evidence of immigrants being more positive towards the welfare state than the main population going against the USA case where the black population is found to be more positive than the white to the welfare state.

A further factor that may play a role here is the role of the media and how it may impact these attitudes. The studies included have not studied the relationship between immigration and negative attitudes towards immigrants in-depth and I would argue that this is an important area to expand on in future studies. As we have confirmed that findings differ by levels of generality it would also be important to include a discussion of how these relationships operate as their impact may differ depending on the support for the welfare state measure used. Crepaz (2008) studies the impact of multicultural policies on support for the welfare state and finds a positive relationship. This is an additional element to that studied by most in the area as he includes immigration policies, which can be claimed to be an area that merits further investigation. However, one needs to take in account which countries have multicultural policies and consider whether these already have higher levels of support for the welfare state (e.g. Sweden).

In the previous chapter we highlighted some potential quality issues in 4 studies in this area; Crutchfield and Pettinicchio (2009), Koning (2011), Dancygier and Saunders (2006), Van Oorschot (2008). In previous chapters it was argued that a focus on explanation and falsification was important when assessing quality of studies, and related to the latter it is clear that the studies’ findings are in line with overall findings in the area of immigration. As can be seen by the findings in these studies compared to the findings in other studies in the area, they, despite their quality issues, reinforce the evidence of the other included studies. Thus, it is argued that they should still be kept as part of the review.

If we had excluded these studies based on quality issues we would have had less evidence supporting the identified trends in this area by evidence deemed as stronger. Thus, in line with a falsification approach to assessment of studies’ quality they are argued to still be of value. By keeping them in as part of the review it can be seen that, although bivariate analysis may omit important factors, the studies included using this approach may help inform a larger research programme (such as Van Oorschot, 2008) or give indication of findings that should be analysed in-depth with other types of analysis methods. Thus, in relation to the use of quality appraisal in systematic reviews this study has shown that there is value in assessing studies’ quality. The quality assessment did for example yield important findings related to the process of operationalization. However, as argued here a quality appraisal should also take into account how the study fits with other studies in an area. In other words, some valuable findings may be found in studies with quality issues, but it is still argued that tools from systematic review traditions are useful in incorporating methods to separate bad research from good research.

The analysis of a range of studies enabled by systematic review tools may thus help researchers identify tendencies that can be further tested in future research. Whilst one could argue that these findings may be found by use of a traditional literature review, it is argued that traditional literature reviews do not analyse nor identify their arguments through a systematic search of available evidence. In addition, traditional literature reviews do not tend to embark on systematic synthesis of previous evidence that lead to comprehensive analysis of within and between study findings. Furthermore, the combination of findings enables researchers to start putting together a type of highway rule set as Pawson (2006) argues. Thus, to inform and strengthen explanatory power of the different theories’ ability to explain trends we find that whilst higher immigration may lead to lower support for redistribution it can also lead to higher concern for the living conditions of immigrants. On the other hand, negative sentiments towards immigrants are consistently found to impact both measures of welfare support and voting.

In terms of the adaptive approach used here we see that synthesising the evidence by giving an overview of directional effects may help us appreciate the heterogeneity of the studies whilst at the same time reducing the information and synthesise the effects across them. However, a weakness is that it is difficult to take it much further than this without running into the same issues around loss of heterogeneity. Furthermore, the lack of findings and studies that gives us changes over time means that this aspect cannot be explored further. Immigration, from the publication dates of these studies seem to be a recent area of focus for scholars in the area and it will be interesting to gain further understanding of changes over time in future studies.

I now turn my attention to the effect of more typical socio-economic and demographic variables at the individual level on support for the welfare state. I will focus on three key variables that most studies include; age, gender and education. These are also important in relation to the various welfare pressures, the ageing population as well as changing family structures and labour markets. The effects of age, gender and education, females are consistently found to be more negative than men when studies control for either (or both) attitudes towards immigrants/immigration and levels of immigration. This can be explained by self-interest as women often use welfare services and benefits more than men and thus may conceive of immigrants as more of a threat. On the other hand, age is found to be positively related to welfare support even when controlled for immigration variables (macro and micro), and the two studies that find them to be negative, Verneby and Finseraas (2010) and Van Oorschot and Uunk (2007), may do so due to their research design and operationalization. Van Oorschot and Uunk’s (2007) dependent variable is concern with immigrants relative to the elderly, which may explain why the elderly may be more concerned with their own group. Whilst Verneby and Finseraas (2010) operationalize age as 1= older than 45 whilst 0= younger. The latter is done as age is claimed to have a curvilinear effect, something which should be further researched.

As argued in the section on macro-level variables it is important to take into account the mediating and moderating effects of the different micro and macro level variables. One finding that underlines this is the fact that controlling for immigration levels is related to negative effects of being female. This finding supports self-interest explanations. In addition it shows that there are different effects of different types of welfare pressures. In other words, higher levels of immigration may mean that women are more negative towards the welfare state; however, the impact of an ageing population is different. It is important to be able to make these observations, paying attention to the multi-dimensionality and complexity of the area, and a review of this type enables these types of analysis. It furthermore emphasises the need to give attention to mediation and relationships between variables at macro and micro level in analysis of support for the welfare state. This again shows the use of systematic review in the synthesis as one needs to put greater emphasis on operationalization and comparability of the included studies, something that is not part of a common literature review. Furthermore, a socialising effect is found with education, another effect that is clearer and more consistent than in other pressures. Here it is positively related to welfare support when controlled for immigration and/or attitudes to immigration/immigrants. Thus, to inform the strength of the different explanatory approaches of welfare support it is found that self-interest in the welfare state may drive individuals to be more negative towards it when controlling for immigration attitudes and levels.

## Table 7.3 Findings on different levels of generality

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Level of generality | Immigration levels | Att. towards immigration/immigrants | Age | Gender | Education | Macro-variables mediating immigration |
| ‘Societal’= 9 studies | 4 \* -1 weak negative on redistribution  1\*-1 on inequality | 3\* -1 | 4\* 1  1\*-1 | 4\*-1  1\*1 | 4\*1  1\*-1 | Welfare regime (Finseraas, 2008; Mau & Burkhardt, 2009; Van Oorschot and Uunk, 2007)  GDP and unemployment rates (Mau & Burkhardt, 2009) |
| ‘Situational’=4 studies | 3\* positive | 4\*-1 | 3\*-1 | 3\*-1 | 3\*1 |  |

Calculations based on significant effects found in analysis. \* denotes times, -1 a negative effect on support measure and 1 a positive. E.g. 3\* -1 means 3 studies with a negative effect.

Effects that are not significant are not included.

Table 7.3 positions the studies by use of the theoretical framework outlined earlier in the paper. Thus, showing how theory may be used to drive research synthesis in a systematic review in the Social Sciences. It is interesting to observe that immigration levels seem to have a positive and socialising effect at the ‘Situational’ level of values, which according to Haller (2002) may change quicker than the more ingrained ‘Societal’ values. This may suggest that the positive effect observed at the ‘Situational’ level may not have crystallised at the ‘Societal’ level yet. Thus, based on this synthesis it may be that the weak negative impact of immigration levels on redistribution can become positive if the socialising effect impacts the ‘Societal’ level over time. The latter is crucial when one aims to understand whether the ethnic heterogeneity hypothesis may occur in Europe. Furthermore, by way of synthesising evidence we also find that the macro-level variables may have socialising effects through welfare regimes mediating the effect of immigration when redistribution is the outcome. This may give evidence of the more engrained ‘Societal’ values represented in cultures and embodied in institutions which serve as filters for rapid changes. Overall, this is an example of how systematic review approaches may help identifying mediating variables difficult to identify and deal with in a single study through its provision of an overview of a wider range of evidence.

On the other hand, self-interest plays a role if higher immigration is combined with worsened socio-economic conditions in a country (as scarcity impacts negatively when measured by GDP and unemployment levels as in Mau and Burkhardt, 2009). In other words a combination of changes at macro level with worsening GDP and unemployment combined with immigration may mean that positive effects such as socialising effects explained by contact theory can have less explanatory effects as scarcity and self-interest come into play. It is important for studies to further explore this in their models by commenting on mediation and relationship between variables so as to further our understanding in this area. This is particularly important given our current global situation where economic and political crises are combined with people moving across borders. The identification of mediating variables both at macro and micro level is crucial if one is to understand a phenomenon more fully, and particularly to inform future studies, a particular feature and benefit of the use of systematic review tools as we have seen here. The different effects of macro and micro level variables also underline how macro level measures of institutions such as welfare regimes may capture ‘Societal’ values in and of itself which can be said to be a result of culture and thus be related to socialising effects. On the other hand we have seen the dominance of self-interest on the micro-level, most notably in age and gender. However, ‘Situational’ values, here measured by concern for immigrants, are impacted positively through what could be explained by socialisation effects of higher immigration levels. Thus it is not so that socialisation necessarily is more important to explain tendencies on one level of generality of values than the other. This underlines the importance of flexible and dynamic theoretical approaches in the area of welfare support that can incorporate different dynamics and explanations at different levels of generality as well as different types. This can be found amongst some newer theorists in the areas that emphasise that citizens are socialised into but then adapt to their institutional settings. Thus, we see a more dynamic approach that goes further than self-interested or socialised support to a theory where moral economies of reciprocity are created and where both approaches are interrelated. As a result we get a more complex picture where individuals’ support for the welfare state is related not only to the regime-dependent institutional reality, norms and self-interest but also to their position as ‘embedded individuals’ influenced by experiences and norms in family relations and social networks.

In summary this section underlines the strengths and weaknesses of SR in the synthesising process. Whilst meta-analysis is made difficult by the range of different methodological and theoretical approaches and by difficulties in synthesising and appreciating the heterogeneity of studies in the Social Sciences, a theory-led systematic review synthesis may help researchers identify what values/attitudes are impacted by what, why and in what circumstances. Furthermore, we have highlighted variables and aspects important to shed light on the ethnic heterogeneity hypothesis such as different levels of generality, gender and attitudes towards immigrants. This systematisation may enable a researcher to organize evidence in new manners that may shed new light on mechanisms at play in a particular area.

**Conclusion**

This chapter has further added to the argument of the thesis in that one should put great attention to how one applies and makes use of systematic review tools in this area. As the previous chapter analysed redistribution in depth through an adapted way of synthesising evidence, I have here carried out an in-depth analysis of the relationship between immigration and ethnic diversity on support for the welfare state. There are practical, methodologically principled and synthesis related issues that arise when conducting a systematic review in the area of support for the welfare state which are also argued to be relevant for the Social Sciences in general. These were explored in the previous chapter, and here we have further built on and developed ways of approaching synthesis of research in this area. It is argued that if these issues are dealt with appropriately systematic reviews may serve the purpose of giving a systematic, comprehensive review of evidence in areas in need of this. Furthermore, mapping exercises of current knowledge may help create bases for further development of theory as well as helping researchers to get a more comprehensive overview of the evidence of what dynamics are at play. Moreover, it has been argued that theory driven research synthesis is important and that iteration, refutation and heterogeneity should be valued in a SR conducted in the Social Sciences.

In terms of findings in trends in support for the welfare state, we find that the American experience is not replicated in Europe. Although there is some support for it in terms of the effect on redistribution, it is argued that one needs to take into account differences in effects on different levels of generality. Thus, whilst there is some negative effect of higher levels of immigration on support for redistribution, a societal level value, the opposite is found for the situational level value ‘concern for immigrants’. This finding is then related to the lack of critical discussion and exploration of what measurement of immigration and ethnic diversity studies use. This is another benefit of synthesising evidence by use of systematic review tools. As in the previous chapter then, it is argued that there is a need for further critical discussion of operationalization in studies in this area. This is further supported by differences in effect by measure. Theoretically, contact theory is supported at the situational level, through concern, whilst self-interest is supported when looking at effects on the individual level when looking at gender and macro-level when analysing effects of GDP and unemployment rates. Education is consistently found to have a socialising effect within this pressure, something that is different in other pressures as seen in the previous chapter. It has also been argued and shown that these findings imply the importance of, and need to further explore the relationship between independent variables emphasising moderation, mediation and confounding factors*.* Overall, as in the previous chapter, the evidence goes in favour of a dynamic theoretical approach emphasising the need to take into account the interplay between institutional context and individuals’ attitudes supporting theories such as Larsen’s (2006) ‘political man’.

# Chapter 8. Conclusion.

*“It is always possible to bind together a considerable number of people in love, so long as there are other people left over to receive the manifestations of their aggression”. (Sigmund Freud, Civilization and its Discontent, 1930, pp. 58-63)*

What binds people together in their support for the welfare state, what kind of welfare state do they support and how has this changed if at all? Is it based on a shared solidarity between citizens or is self-interest the driver for supporting an entity of collective insurance such as the welfare state? This thesis set out to carry out a review of what we know about support for the welfare state and welfare legitimacy in light of societal changes at local, national, regional and global levels. By applying tools from both systematic review and realist synthesis I have highlighted problematic issues with the use of systematic review in the Social Sciences and have shown how systematic review tools can help identify issues within the field of support for the welfare state. Systematic review tools can be of use in the Social Sciences, if one takes into account the characteristics of the area that make it difficult to carry out a traditional systematic review and acts appropriately.

The endeavour to use systematic review tools in the area can best be described as a bumpy ride, and along the way a range of practical and methodological issues with using the method in the Social Sciences were identified. As described in the findings chapters there is a range of issues related to the disciplines within the Social Sciences. This means that it is problematic to apply the methodological assumptions of a systematic review uncritically. There are also practical issues related to the use and set up of databases and software that further complicate the process. Therefore, this thesis has argued for the importance of inclusiveness, heterogeneity, iteration and judgment if one is to carry out a successful review in the Social Sciences. This is because the Social Sciences have a diversity of methods and ways in which a vast amount of areas are being studied, which means that an emphasis on homogeneity could mean that one misses out on important knowledge and understanding. During the process of the thesis project an approach making use of some of the principles of realist synthesis was developed as this theory enables and values iteration. The latter has been argued to be needed to appreciate and value the heterogeneity found in the field as well as a drive to understand the explanatory mechanisms at play.

The thesis has thus approached the synthesis of findings through use of a theoretical framework to which studies’ findings have been added, creating a roadmap with patterns outlining which roads are wider and better paved,. In other words which explanations have been found to be better suited to explain tendencies in welfare state support. The framework has been built around a focus on what attitudes are, emphasising the need to differentiate between values and attitudes, what they consist of and how they are measured. It has been argued that measuring attitudes or deeper seated values will make a difference and impact upon findings, and that greater attention should be given to the operationalization and approaches to the content of attitudes and values. The latter is also argued to be a way in which the use of systematic review may help further knowledge in the Social Sciences.

**Starting point**

The thesis’ methodological and theoretical approach was designed to answer three main research aims:

1. *Gauge knowledge (what we know and don’t know) and identify the explanatory power of different theories found in the area of support for the welfare state related to the pressures developed welfare states in Europe, USA, Canada, Australia and New Zealand are facing.*
2. *Identify and develop hypotheses and potential new approaches produced through the use of an adapted systematic review methodology (include knowledge produced by the quality appraisal of current studies)*
3. *Analyse and provide new explanations of the relations between immigration and support for the welfare state as well as trends in attitudes towards redistribution as a measure of support for the welfare state, by using new approaches and hypotheses from the findings from research objectives 1 and 2 and carrying out in depth meta-analysis****.***

The first and third research aim was answered through analysis of findings by use of adapted tools from systematic review and realist synthesis, as well as building a theoretical framework to which findings and the explanatory models could be confirmed or refuted. The following sections outline trends in support for the welfare state and discuss how tools from the systematic review tradition were adapted and applied in the project. The next section will summarise the findings and is followed by a discussion of the limitations and future research need.

**Theoretical framework – building a framework for an adapted synthesis approach**

The thesis outlined a theoretical framework to be used in analysis rather than the typical full overview of literature in an area. This choice was made due to the nature of the study, a review, as a discussion of literature and findings in an area also take place when discussing the findings of a review. In addition the theoretical chapter of the thesis argued that there is a need to take into account and discuss what we are measuring when we measure support for the welfare state. This does not only mean a focus on operationalizing a concept such as equality, but also a greater attention is also needed to understand and analyse differences between attitudes, values and beliefs. To address this the chapter outlined a framework building on Haller’s (2002) approach using levels of generality differentiating between universal, societal and situational values. This framework was then used in the findings’ chapter to analyse whether or not findings differ depending on levels of generality of a dependent variable. As has been shown, they do differ, and there are different trends depending on levels of generality. Thus, there are different trends when we measure societal level values such as redistribution compared to trends identified with concern for needy groups.

**Methodological argument – an alternative approach to systematic review**

In the methodology chapter I discussed the approach taken in the thesis to answer the research question. An approach adapting and making use of systematic review tools, with the aim to achieve a comprehensive review of the evidence in the area. However, it was also argued that due to issues pertaining to the research conducted in the Social Sciences such as a diversity of methods, theoretical approaches as well as the complexity of the social world and the process of using databases, we needed to adapt the approach in this study. Furthermore, it was argued that falsification should be inherent within a review. Thus, principles and tools from realist synthesis were included in the methods used in the project. This enabled an iterative approach valuing patterns of explanations as values that may help achieve a comprehensive and knowledge enhancing review.

**Quality issues - using an inclusive procedure**

An important part of a traditionally structured systematic review is the quality appraisal of studies. As discussed in the methods section of the thesis I used an adapted list of quality criteria building on Wallace et al. (2006) to assess studies in the area, and also emphasised relevance and rigour following the realist synthesis approach. This is an approach that adapts to and assesses a range of methodological approaches. Furthermore, no hierarchy of evidence was used as it was argued that there is no single method that has all the advantages compared to others. In line with an explanation driven approach, the study has given importance to the patterns of explanations found in the studies to emphasise the value of their findings, and whether or not the methods used help answer the research question at hand rather than rating their findings based on a simple hierarchy of evidence. The quality appraisal found that the studies overall had a high level of quality and no study was excluded based on the quality appraisal. By using the tools the project did however highlight some issues that should be further discussed and emphasized in future studies. These include a greater need to have further critical discussion of choices of countries, the limitation of survey data and methods in addition to the issues already mentioned related to operationalization.

The finding that all studies were acceptable for inclusion is not surprising given the dominance of peer reviewed studies, which entail a pre-selection quality check. It was argued however, that three studies making use of only bivariate analysis, although useful to explore and suggest areas for further in-depth studies could have been more critical and highlights the limitations to this approach further. The combination of operationalization issues and the difficulties that may be related with measuring concepts cross-nationally, as they may have different meanings to citizens in different countries (as seen in Taylor-Gooby and Rose, 2010), calls for caution and further critical discussion in studies in the area. The finding that there is little discussion of choices and number of countries is problematic. As Svallfors (2010) underlines, we need to be conscious of the impact of the choice of countries included on findings. This aspect is particularly important when we seek to understand the impact of societal and institutional effects.

In terms of assessing the systematic review and realist synthesis tools used to assess quality, it was found that, in line with Pawson et al. (2004), the long list of quality criteria makes the exercise a time consuming one where a researcher’s judgement influences choices made during the research project. Thus, one cannot assume that exact replication can be carried out as is assumed in traditional systematic review approaches. As a result, what can be argued to be a weakness of this study, the lack of inter-rater reliability tests, is made very difficult in this type of review due to the diversity and need for iteration when carrying out a review in the area. The approach taken to quality appraisal and iteration in this study as well as an explanatory driven approach moves away from replication and typical systematic review tools such as inter-rater reliability and emphasises transparency, explanation and judgement in line with Pawson et al. (e.g. 2004). Using inter-rater reliability tests assumes that replication is possible; however, the diversity and complications related with carrying out a traditional systematic review approach in the Social Sciences is argued here to make these tests of little value. As Pawson et al. (2004) argue “standards are prone to complexity, abstraction, contradiction, imbalance and fragmentation” (Pawson et al., 2004, p.12). As a result the thesis relies on the quality assurance of supervision as well as use of scholars from evidence networks (e.g. <http://www.kcl.ac.uk/schools/sspp/interdisciplinary/evidence/database/>) to ensure the quality of the tools as well as judgement used at every step of the process. The latter is argued to be of greater value as it appreciates the complexity and heterogeneity of the studies in question.

**Trends in support for the welfare state – research aim 1**

In terms of overall trends in supportfindings can be separated into practical issues related to the process of making use of systematic review, and issues and trends identified through synthesis of studies’ findings. Practical issues were identified in terms of time consumed due to technical issues related to software, high numbers of hits when using databases, import/export issues related to the high number of hits, as well as issues pertaining to geographical coverage and bias in large databases. As a result of these issues the project made the decision to draw on approaches used in realist synthesis, and also to put greater emphasis on iteration and explore alternative adaptations of systematic review tools. I would argue that anyone intending to carry out a systematic review in the Social Sciences should be aware of the issues raised here as one could go so far as to claim that a fully comprehensive review including all relevant studies is near impossible based on the experiences had in this project. This does not mean that using tools from the systematic review toolbox is not useful; it can give an overview of knowledge, and highlight issues such as operationalization and help give weight and strength to explanatory approaches. It does mean however, that those claiming to carry out an all-inclusive comprehensive review should be very critically assessed.

In terms of the synthesis of trends in support of the welfare state the project identified a complex network of explanations and aspects that are important to explain trends in support for the welfare state. One theory that seems to be able to encompass and explain some of this complexity is that of a ‘political man’ (Larsen, 2006; 2008) “where policy attitudes is open to different perceptions of reality. Such a position fits nicely with studies that have shown that attitudes towards concrete policy proposals are highly dependent on the framing of the political issues” (page 3 <http://www.northwestern.edu/rc19/Larsen.pdf>). This theory was strengthened through the synthesis as there was evidence in favour of impact of contexts as well as self-interest. Thus, a combination of socialisation, self-interest and context is important and points towards an existence of reflective individuals who respond to and change attitudes according to contextual factors such as policy changes.

In general I found a high level of support for general concepts about support for government intervention and responsibility in the area of social welfare. I furthermore found that there are variations within the groups depending on measurements, in line with the focus on measurement and operationalization found in the thesis overall. In other words, overall, there was little support for those claiming that support for the welfare state is disappearing. Furthermore, we have seen that even though we have an ageing population there is high level of support for pensions, whilst, in line with the ranking of deserving groups (e.g. Van Oorschot, 2008), support for unemployment benefits is lower than support for pensions. Further to evidence of an impact of context and self-interest, class is found to have continued influence on support for the welfare state, and Scandinavian countries are the countries where we find this to be a significant this factor. The latter goes against what one may expect based on Esping-Andersen’s (1990) regime typology. There was little agreement across studies, and where most find an influence of self-interest in some way, others place an emphasis on normative orientations and values. Thus, values that could be seen as deeper-seated, such as views on social equality are found to impact attitudes here measured through support for the welfare state. The latter again highlights the need to further study the relationship and variations found when studying values versus those found when studying attitudes.

The arguments related to operationalization and levels of generality were further explored by an in-depth analysis of redistribution, and it was found that measurement of redistribution impacts findings. In addition, issues were highlighted exploring issues related to operationalizing redistribution, and questioned the assumption that redistribution as a goal necessarily was seen as such by citizens. In other words it was again argued that greater emphasis and critical discussion of operationalization is needed. The focus on redistribution also explored some adapted ways of synthesising evidence, showing ways in which systematic review tools may help enhance our knowledge. Furthermore, it was shown that findings also vary by welfare pressure. Thus, unemployment rates create increased demands by citizens at risk of unemployment whilst we see different impact of levels of inequality. Different effects are furthermore found depending on the level of generality of the measure used.

**Trends in support for the welfare state – research aim 3**

When synthesising studies focusing on the impact of higher ethnic diversity and immigration, the expectation, based on the American experience (e.g. Alesina & Glaeser, 2004), that increased immigration and ethnic diversity lead to lower support for the welfare state was not confirmed. This is because the effects were not consistent across welfare support measures. The chapter shows that the levels of generality matters and whilst weak negative effects were found with higher fragmentation on redistribution the opposite was the case when synthesizing findings from studies measuring concern for immigrants. It also showed that specific to immigration, education as an individual level variable has a stronger and more consistent positive effect than when we analyse other pressures and measurements of support for the welfare state. In addition negative attitudes towards immigrants were found to have negative impact on support for the welfare state. Furthermore, again, a beneficial outcome of using tools from systematic review was that we gained a greater understanding of the fact that different measures of immigration and ethnic diversity matters and should be further critically discussed. Thus, studies should put greater emphasis on what measure they use, whether or not it is relative to the size of the greater population, distance to majority identities, types of immigrants and take into consideration time. The latter is argued to be important to gain greater understanding of whether ethnic and racial fragmentations established over time have similar or different effect compared to new inflows of immigrants of different types.

**Future research needs**

Through this thesis a range of issues and weaknesses with current studies have been highlighted, and these have already been argued to be areas where studies can improve and which should be addressed in future studies. These include further focus and understanding of what we are measuring and how we operationalize our concepts. Furthermore, a greater focus on the difference between values, attitudes and beliefs has been argued to be needed in future studies. Further studies on this through use of innovative methods, combinations of theories with new and existing data could help address these issues. The next paragraphs will discuss future research needs and place these relative to the findings of Svallfors (2010) in the latest issue of the Oxford Handbook of the Welfare State. There, Svallfors (2010) embarks on an overview of knowledge in the field of welfare attitudes.

A result of carrying out an adapted systematic review is that we get a better sense of unmet needs, uncovered areas as well as the typical methodological and theoretical weaknesses of current studies. Svallfors (2010) does so without making use of systematic review tools, but by use of his considerable expertise in the area, and it is important here to comment on how my findings relate to his observations and show how this thesis has contributed to knowledge going beyond his review. As I have discussed earlier there is a lack of data on support for the welfare state over time, a lack of longitudinal data. The latter is also an observation made by Svallfors (2010). Svallfors (2010) further highlights the need for data on a larger number of countries. Here, I have limited myself to a smaller number of countries but there is still a finding of this project that it would be useful to have a greater number of countries so as to further explore the impact of differences and similarities for example when it comes to institutional arrangements.

Furthermore, like Svallfors (2010) I have found that there are only a limited set of methods used, and combinations of methods may help address some of the issues found in this thesis. In addition, the lack of qualitative studies found in this thesis, not highlighted by Svallfors (2010), could help address some of the issues raised here in relation to operationalization and measurements. Svallfors calls for more studies combining approaches to increase understanding of dynamics and relations between public and elite discourses, media and citizen’s attitudes. Here, it was found that in addition to that observation, there is a need to analyse existing data further in terms of endogenous factors to understand the interplay between different levels of independent variables. He furthermore criticises the area for a lack of explanation, and this study hopes to have added to and addressed this need in identifying what explanations have been found to be confirmed across studies. The analysis here also indicates a further need for theory building and development in the area. Above all further critical theoretical discussion of the meaning of concepts, the process of operationalization as well as explanations is needed. In this study it has been found that self-interest plays an important role in explaining support for the welfare state; however, further exploration of the role of norms and values is important also to understand differences across different levels of generality. Further to norms and different actors’ influence on attitude shaping and re-shaping, it was found, as does Svallfors (2010) a lack of studies analysing individual’s biographies, in addition to personal experience and future outlook. Thus, overall there are a range of areas that can be explored further to enhance our understanding of support for the welfare state. In the final section of the thesis policy implications of the findings will be explored and discussed

**Policy implications, or the lack thereof**

In this review a key finding is that that even though the included studies relate to policies through studying people’s attitudes towards policies and goals of the welfare state, very little is written about what findings may mean for policies. These aspects are rather dealt with through an emphasis on how institutional frameworks may impact citizens’ attitudes, and political scientists’ focus on reported voting behaviour. In other words studies in the area do not tend to take their findings the step further and inform policies. So, a question is why this may be the case? Is it due to the hesitation of claiming that there is a direct impact of attitudes on behaviour? Ajzen and Fishbein (1975) were among the first scholars to focus on this aspect in psychology and although we do not often write or say it there is an underlying assumption in our work that even if it may not be voting behaviour, attitudes do have some impact in how we interact with other people. Thus, attitudes are amongst others related to stigma (Baumberg et al., 2012) of claiming benefits. A very real and important aspect that one could be argued should make scholars in the area engage actively with policy.

Based on the findings in this study I can make some suggestive claims related to the main findings that could be important for policy and policymakers. First of all, the decisions made, re-shaping the context within which citizens live will have an impact on people’s attitudes. I found support for the ‘political man’ theories where individuals are shaped by their institutions but where they are also reflective citizens who react in their own interest within these frameworks. Thus, policy makers should go further than creating policies that may incentivise certain behaviour through nudge economics and consider how it may impact how people relate to each other. As a result the implications of the increase or decreases of certain sets of attitudes towards issues such as benefit claimant stigma may have a longer standing impact on the overall sustainability of welfare states as new sets of attitudes may not support the type of arrangements found in a particular country.

In terms of a specific policy implication based on this study, the finding that the relationship between support for the welfare state and welfare pressures vary between the different pressures is important. Thus, policy makers should know that contact theory and socialisation through education can be important aspects to keep in mind when it comes to rising immigration and concern for immigrants. As a result, policies aiming to increase contact between different ethnic groups could be advisable based on these findings. Furthermore, it is clear that scarcity, through higher unemployment rates and economic difficulties may increase the demand for state intervention by groups who are at risks due to this. This may be an aspect that should be addressed in policies, if not through assisting these groups in difficult situation, at least through addressing their concerns in places providing support for these groups. Based on the findings here there are in other words some suggestions about factors that wise policymakers should consider. However, as in most studies in the area it is difficult to give specific recommendations for policies as these do not tend to be studied. Even though this is the case a finding in this study and a final recommendation for future studies, is that more work should be done linking policies and support for the welfare state so as to further our understanding of the dynamics at play.

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# Appendices

Order of appendices:

1: Databases searched

2: Search strategies

3: Author & Year, survey and method

4: Author & Year, outcome and research question

5: Author & Year, findings

**Appendix 1 Databases searched**

* Hand search
* Particularly relevant journals from the following publishers:
* Cambridge journals
* Oxford journals
* Sage journals
* Reference lists of a random sample of included studies
* Trial searches of the following databases to check coverage and avoid bias:
* [OAIster](http://oaister.umdl.umich.edu/o/oaister/)
* [Open J-Gate](http://openj-gate.com/)
* Databases to be searched:
* ASSIA
* Social Policy & Practice
* EBSCOHost
* [International Bibliography of the Social Sciences](javascript:__doPostBack('ctl00$ctl00$_mainContentArea$MainContentArea$SelectDbControl$dbList$ctl11$ctl00$titleLink',''))
* [International Political Science Abstracts](javascript:__doPostBack('ctl00$ctl00$_mainContentArea$MainContentArea$SelectDbControl$dbList$ctl13$ctl00$titleLink',''))
* [PsycARTICLES](javascript:__doPostBack('ctl00$ctl00$_mainContentArea$MainContentArea$SelectDbControl$dbList$ctl15$ctl00$titleLink',''))
* [PsycINFO](javascript:__doPostBack('ctl00$ctl00$_mainContentArea$MainContentArea$SelectDbControl$dbList$ctl16$ctl00$titleLink',''))
* SIGLE
* Google Scholar-
* JSTOR
* ERIC
* HMIC
* Labordoc
* Scopus
* Communitywise
* [Web of knowledge](http://library.kent.ac.uk/cgi-bin/resources.cgi?url=http://isiknowledge.com/)
* Science Citation Index Expanded (1970-present)
* Social Sciences Citation Index (1970-present)
* Arts & Humanities Citation Index (1975-present)
* Conference Proceedings Citation Index- Science (1990-present)
* Medline
* Journal Citation Reports
* OvidSP select database page

**Appendix 2 Search strategies**

((Attitudes or beliefs or values or perceptions or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes) AND (welfare or welfare state or social security or social protection or social insurance or social policy or welfare states or welfare related topics or social services or public policy or social programmes or social programs or welfare state regimes or welfare typology or welfare regime or welfare system or regime or production regime))

((Welfare or welfare state or social security or social protection or social insurance or social policy or welfare states or welfare state regime or welfare regime or production regime or public policy or social services or social programmes or social programs) AND (ambivalent policy attitudes or ambivalent attitudes or social representations or interest or orientation or value orientation or financial concerns or concern whether able to maintain standard of living or ability to afford household necessities or satisfaction with current financial situation or confidence in the economy and))

(Welfare support or support for welfare or support for welfare state or public support for welfare or welfare evaluation or welfare consequences or moral welfare consequences or social welfare consequences or economic social consequences or market values or welfare values or conditionality of welfare support or welfare demand or insurance attitudes or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or welfare backlash or welfare performance and welfare provision and welfare providers or future of welfare or perceptions of the future of welfare or future of the welfare state or perceptions of the future of the welfare state or future of social security or perceptions of the future of social security or future of social protection or perceptions of the future of social protection or future of social insurance or perceptions of the future of social insurance or affordability of welfare state or affordability of welfare or can afford welfare or social benefits and services place to great a strain on the economy or future of public sector or pressures on the welfare state or welfare demands or social demands)

(Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social services or social programs welfare state regime or welfare regime or production regime) AND (religion or religiosity or ffrequency of church attendance or church attendance or participation in religious services or service to others or meaning to one's life or belonging or self-knowledge or worshipping God or holism or social transformation or preserving identity or leaving a legacy or inner peace or spirituality or human fellowship or religion as a manual for how to live ones' life ethics or ethics or rreligious or religious denomination or religious community or secularization or atheism or atheist or agnostics- or fear of Islam or fear of Christianity or fear of Judaism or fear of Hinduism or fear of Buddhism or attitudes to Islam or attitudes to Christianity or attitudes to Judaism or attitudes to Hinduism or attitudes to Buddhism or praying or frequency of praying or importance of god or strength of religion or comfort from religion or traditional belief or superstition or churches giving adequate answer to today’s problems or commitment to the church or commitment to a religious institution or religious feelings or connection to a church or connection to a religious institution or free market in religious ideas or religious economy or church providing social services or religious institutions providing social services)

((Welfare or social protection or social security or social insurance or social policy or public policy or social services or social programmes or social programs or welfare state regime or welfare regime or production regime) AND (trust or confidence) AND (public or political or social or in the government or in system efficacy or in the justice system or in regional institutions or in politicians or in political parties or in public institutions or in private institutions or in other people or in church or in religious institutions or in democratic institutions or in parliament or in president or in political system or in EU institutions or in EU or in European parliament or in European Commission or in political decisions or in political processes or in trust in education system or in health care system or in social services or in welfare state or in social security system or in social insurance institutions or in social insurance system or in civil services or in the press or in the UN or in Nato or in others or in institutions or in neighbors or in neighbours or in immigrants or in foreigners or in refugees or in democracy or in federal state or federal system or federal institutions))

((Welfare or social protection or social security or social services or social insurance or social policy or public policy or social programmes or social programs welfare state regime or welfare regime or production regime) AND (social trust or political trust or institutional trust or perceived trust or trust in manager or interpersonal trust or interpersonal confidence or institutional trust))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social services or social programs welfare state regime or welfare regime or (production regime and welfare)) AND (social capital or contact with family or contact with friends or spending time with other people or community work or community activities or voluntary work or voluntary activities or membership of social group or membership of association or membership of social group or membership of charity or membership of organization or membership of organisation or membership of social network or who would you like to have as neighbours or who would you like to have as neighbors or dissonance or cognitive dissonance or sociological man or economical man or political man or homo economicus or homo sociologicus or socio-economical man or reference groups))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social services or social programs or welfare state regime or welfare regime or (production regime and welfare) or attitudes or perceptions or values or beliefs or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes) AND (pension or pensioners or pension attitudes or attitudes to pension or pension scheme or attitudes to pension scheme or perceptions of standard of living of pensioners or perceptions of pensioners’ living conditions or perceptions of standard of living of elderly or perceptions of living conditions of the elderly or perceptions of standard of living of older people or perceptions of living conditions of older people or care for the elderly or ageing or old people or older people or elderly or integration of older workers or reforming retirement system or older wage earners or old wage earners or ageing wage earners or active ageing or active old people or active elderly or ageing unemployed or elderly unemployed or old age pensions or preferred real retirement age or preferred relative retirement age or eligibility age or early exit or early retirement or exit age or preferred exit age or retirement age))

(health or healthcare or priority or healthcare's basic levels or vulnerable groups or allocation of resources or political government of healthcare or professional responsibilities or over-treatment or under-treatment or unequal access to health care or discrimination or discrimination due to age or social discrimination or discrimination due to other patient characteristics or cost-containment or adverse effects as a result of scarcity or resource availability or pressure to ration or under-insurance or health benefits or health insurance or health financing or cost constraints or uninsured or insured or insurance package or insurance or low income uninsured or healthplans or health plans or choosing healthplans or choosing health plans or patient preferences or distribution of limited resources or rationing healthcare or insurance based on reimbursement or insurance based on fairness or insurance based on catastrophic coverage or perceived scarcity or pressure to ration or experience regarding scarcity or perceived equity or perceived discrimination or physicians attitudes towards cost-containment policies or healthcare professionals’ attitudes towards cost-containment policies or officials attitudes towards cost-containment policies or social worker’s attitudes towards cost-containment policies or care workers attitudes towards cost-containment policies or civil servant’s attitudes towards cost-containment policies or affordability of health care services or affordability of pensions in the future or will you get the level of care needed if you fall ill or attitudes to disabled or attitudes to disability or attitudes to the handicapped or attitudes to the incapacitated or disability pensions or incapacity benefit or self-care or independent living or social services for disabled or social services for handicapped or social services for incapacitated or social benefits for disabled or social benefits for handicapped or social benefits for incapacitated or social care or adult social care or care for the elderly or care or care for the disabled or care for the handicapped or care for the incapacitated or childcare or mental care or care for children or attitudes to care or attitudes to social care or attitudes to care for elderly or attitudes to care for old people or attitudes to care for the aged or attitudes to care for pensioners or attitudes to childcare or attitudes to mental care or attitudes to care for children or work-care reconciliation or attitudes to work-care reconciliation or national care systems or attitudes to national care systems or care systems or care institutions or attitudes to care systems or attitudes to care institutions)

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social services or social programs welfare state regime or welfare regime or (production regime and welfare)) AND (family or unequal labour market or unequal labor market or new forms of family life or traditional forms of family life or need of both a father and a mother or maternity leave or parental leave or attitudes on gender roles or attitudes to gender roles or attitudes to mother's employment or mother’s employment or reproductive rights or duty of women or when jobs are scarce, men should have more right to a job than women or duty of men or duty of parents or children or children’s welfare or child care provision or childcare or youth welfare or teenage pregnancy or teenage mothers or provision of benefits for youth or perceptions of affordability of child care services or perceptions of opportunities for young people to find first full time job or value of care or universal breadwinner model or the caregiver-parity model or equality between women and men or paid parental leave or dual breadwinner model or equitable division of domestic labour or equitable division of domestic labor or male-breadwinner or male-breadwinner model or married-with children or female housekeeper or housewife or individualization or dual-income families or lone parent or one-parent family or single parents or divorce or marriage or fall of traditional families or traditional family or classic family or couples living together or co-habiting couples or gay couples or gay parents or reconstituted families or redistribution of household tasks or redistribution of domestic responsibilities or redistribution of caring responsibilities or sharing of household tasks or redistribution of domestic responsibilities or redistribution of caring responsibilities or female responsibility or new gender order or new father role or father role or father’s role or importance of family children need both a father and a mother or ideal family or approval of a single mother or father-centered family or children-centered family or marriage is outdated or justifiability of divorce or approval of divorce or parent-child relationship or parenting or parenting style or working mother or opinions on working mother fulfillment- role of women or do women prefer a home and children or is the child likely to suffer if a mother is working or role of family or responsibility of parents or responsibility of mother or responsibility of father or tie family to care and equality or gender policy or family policy or gender arrangements or gender or women’s rights or women should be prepared to cut down on her paid work for the sake of her family or role of women or role of men))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs welfare state regime or welfare regime or social services or (production regime and welfare)) AND (class or social class or social stratification or social strata or middle class or white collar or blue collar or low-paid workers or skilled workers or manual workers or semi-manual worker or semi-skilled worker or subjective social class or under class or political class or bourgeois or working class or middle class or upper class or conflict between class or class orientation or class values or class perceptions or class differences or class cleavages or class interest or class morality or class ethics or class identity or class-conscious or class-consciousness or class struggle or class struggles or attitudes to class or class attitudes))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs welfare state regime or welfare regime or social services or (welfare and production regime)) AND (immigration or migration or emigration or ethnic minority foreigners or resentment towards immigrants or risk of new immigration waves or relative concern for immigrants relative to other needy groups or attitudes towards immigration or attitudes towards migration or attitudes towards emigration or perceptions of consequences of immigration or economic self-interest or economic threat or ethnic homogeneity or ethnic fractionalization or ethnic heterogeneity or ethnic intolerance or how immigration it affects welfare or how migration affects welfare or how emigration affects welfare or immigrants’ use of welfare benefits or migrants’ use of welfare or emigrants’ use of welfare or immigrants steal jobs or migrants steal jobs or emigrants steal jobs or immigrants take away jobs or migrants take away jobs or emigrants take away jobs or immigrants’ entitlement to benefit or migrants; entitlement to benefits or emigrants’ entitlement to benefits or immigrants’ right to benefits or migrants’ right to benefits or emigrants’ right to benefit or immigrants’ contribution to the welfare state or migrants’ contribution to the welfare state or emigrants’ contribution to the welfare state or perceptions of amount of immigrants or perception of amount of migrants or perception of amount of emigrants or perception of amount of foreigners or perception of amount of non-white immigrants or perception of non-European immigrants or immigrant families or immigrants coming to live in their country or social benefits and services encourage people from other countries to come and live here or what the government should do about people from less developed countries coming here to work or diversity or tolerance or intolerance or cultural integration or integration or segregation or assimilation or race or prejudice or overt prejudice or covert prejudice or solidarity towards immigrants or solidarity towards emigrants or solidarity towards foreigners or desired action of government on immigration or concern for migrants or concern for immigrants or concern for foreigners or concern for emigrants or asylum seekers or refugees))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare) AND (perception of institutional efficacy or perception of institutional efficiency or quality of service or effectiveness of government and public service providers or effectiveness of government or effectiveness of public service providers or efficacy of health care provision or efficacy of tax authorities or political efficacy or efficiency of government and public service providers or efficiency of government or efficiency of public service providers or efficiency of health care provision or efficiency of tax authorities or political efficacy or political efficiency or quality of public services or quality of pension schemes or quality of private pension or quality of public pension or quality of occupational pension or quality of pension system or quality of pension provision or quality of education system or quality of educational institutions or quality of public education or quality of private education or quality of transport system or quality of healthcare or quality of health services or quality of public health system or health system or quality of private health system or quality of health provision or quality of social services or quality of social care or quality of care provision or quality of social care provision or quality of housing institution or quality of housing policy or quality of childcare or quality of childcare provision or quality of social assistance or quality of social assistance provision or quality of social assistance institution or quality of care for children or quality of care for the disabled or right to participate in decision-making or quality of information or user-involvement in public services or policy implementation or aattitudes to public officials or attitudes to social workers, or attitudes to healthcare professionals or attitudes to nurses or attitudes to physicians or attitudes to medical doctors or attitudes to bureaucrats or attitudes to civil servants))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare)) AND (citizenship or full citizenship or equal citizenship or decline of citizenship or non-citizens or outsiders or in-group or out-groups or in-groups or out-group or insiders or outsiders or civic duty or civic responsibility or civic obligations or civic rights or duty or responsibility or obligations or rights or civic virtue or civil liberties or freedom of speech or political freedom or freedom of press or personal freedom or civicness or the good citizen or good citizen or civic engagement or civic participation or membership of civil society or engagement in civil society or civil society or voluntary sector or third sector or private sector or government or independent sector or social economy or civil rights or civic rights or social rights or political rights or social harmony or fundamental rights or basic rights or human rights or volunteers or volunteering or volunteer or volunteer in social welfare and community action or volunteer in cultural and sports activities or volunteer in unions and professional organization or membership in voluntary organization or strength of civic society or strength of civil society or strength of community or strength of social economy or strength of voluntary sector or strength of independent sector or community or role of civil society or role of third sector or role of community or role of civil society in welfare provision or role of third sector in service provision or role of community in welfare provision or role of voluntary sector in welfare provision or role of independent sector in welfare provision or role of social economy in welfare provision or service delivery by private companies or service delivery by civil society or service delivery by third sector or service delivery by voluntary sector or service delivery by independent sector or service delivery by social economy))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare)) AND (permissiveness or tolerance or acceptance or civic permissiveness) AND (homosexuality or euthanasia or divorce or suicide or cheating on taxes or accepting a bribe or corruption or bribe or casual sex or acceptance of others; lifestyle or of others or cheating or criminal activities))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare)) AND (deviance and rights to benefit or right to social services or abuse of benefits or abuse of social services or attitudes towards deviance from civic norms or attitudes towards cheating on taxes or attitudes to bribery or attitudes to claiming state benefits without being entitled to pr attitudes towards speeding or attitudes towards drunk driving or respect for authority or belief in authority or emphasis on the development of the individual or emphasis on money/material possessions or welfare states hollows out important social structures and family networks or the evil welfare state or evil welfare state or welfare state erode social structure or people who break the law should be given much harsher sentences than they are these days or harsh sentence or too soft sentences or extent to which people obey laws or perception of sentences or abuse of welfare or too many people abuse social systems or abuse social system or abuse social systems or many unemployed don’t really want a job or social benefits make people lazy or less willing to care for one another or welfare state make people less willing to look after themselves and their family or perceptions of those using welfare benefits or perceptions of those receiving welfare benefits or social security make people lazy or social benefits make people lazy or benefit claimants or recipients or benefit recipients or claimants or corruption or welfare state is malfunctioning))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare) or attitudes or perceptions or values or beliefs or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes) AND (employment or job or work or labour or labor or job insecurity or employment insecurity or work insecurity or labor insecurity or labour insecurity or labor market policies or labour market policies or economic change or vulnerable segments of the workforce or structural unemployment or labour market position or labor market position or workforce or ability of finding a job or labour market integration or labor market integration or labour market participation or labor market participation or part-time work or temporary employment or self-employment or full-time employment or paid work or unpaid work or wage earners or flexicurity or flexibility job security or flexible wages or flexible working time or flexible employment protection or labor market or job market or labour market or changing labour market or changing labor market or changing job market or inflexible labour market or inflexible labor market or inflexible job market or job creation model or activation strategy or passive labour market policies or passive labor market policies or active labour market policies or active labor market policies or ALMP or youth employment or low employment protection or high protection during unemployment or employment insecurity or employment strategies or employment conditions unemployment rate or work as an economic necessity or people who don’t work are lazy or work is a duty towards society or job satisfaction or work satisfaction or labour satisfaction or labor satisfaction or work orientation or expressive work orientation or instrumental work orientation or post-modern work orientation or modern work orientation or importance of work or importance of leisure time or importance of work qualities or work qualities or expressive work qualities or instrumental work qualities or job security or work security or labour security or labor security or importance of an interesting job or important job aspects or post-modern worker values or modern worker values or perception of difficulty of finding an acceptable job or flexible working hours or feelings of pressure or feelings of control over ones work or freedom of decision making or locus control or work ethos or work ethic or duty towards society or obedience to ones superior or fear based management style or management leadership or modern management or women’s participation in the workforce or female employment or participation of married women in labour market or participation of married women in labor market or wife’s participation in workforce or wife’s participation in labour market or wife’s participation in labor market or employment benefit packages or low-income employees or unemployment expenditure or perceptions of standard of living of unemployed or perception of living conditions of unemployed or attitudes to the unemployed or perceptions of unemployed or attitudes towards work or balance of work and domestic life or social benefits and services make it easier for people to combine work and family life or perception of current employment situation or concern for the unemployed or solidarity with the unemployed))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare) or attitudes or perceptions or values or beliefs or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes) AND (poverty or attitudes to the poor or poverty policy or sympathy to the poor or sympathy with the poor or sympathy with the needy or sympathy with those in need or perceptions of poverty or perception of amount of poverty or perceptions of need or perceptions of amount of needy or perceptions of the frequency of need or perceptions of the frequency of poverty or social benefits prevent widespread poverty or deprivation or material deprivation or material need or attitudes to alleviate poverty or deservingness or poverty traps or perceived deservingness or reciprocity or welfare deservingness or causes of poverty or reasons for neediness or need or needy or poor or undeserving or concern or concern for elderly or concern for the aged or concern for pensioners or concern for old people or concern for older people or concern for the disabled or insurance for the poor or concern for the living conditions of the poor or concern for the living conditions of the unemployed or solidarity to the needy or solidarity to the poor or solidarity with the needy or solidarity with the poor or control or blame or stigma or pity or fate or laziness and lack of will power or injustice in our society or inevitable part of modern progress or they are unlucky or dependency culture or welfare dependency or dependency or social exclusion or social integration or political integration or stigmatisiation or marginalization or marginalisation or social marginalization or social marginalisation or labour market marginalization or labor market marginalization or labour market marginalisation or labor market marginalisation or economic marginalization or economic marginalisation or political marginalization or political marginalisation -or social participation or labour market participation or labor market participation or economic participation or political participation or entitlements or entitlement or entitlement to benefit or entitlement to benefits or entitlement rules of benefits or determination of benefit level or duration of benefits or duration of entitlements to benefits or willingness to improve living conditions for the elderly or willingness to improve living conditions for the aged or willingness to improve living conditions for older people or willingness to improve living conditions for the sick or willingness to improve living conditions for the unemployed or willingness to improve living conditions of the disabled willingness to improve living conditions of homeless willingness to improve living conditions of pensioners))

((Attitudes or beliefs or values or perceptions or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes) AND (children or child poverty or poverty in elderly or poverty in old people or poverty in pensioners or old people in poverty of elderly in poverty or pensioners in poverty or unemployment poverty or health or healthcare or housing or homeless or unemployment or unemployed or employment or pensions or pensioners or disabled or handicapped or sickness benefit or accidents or families or refugees or immigrants or migrants or foreigners or emigrants or education or work or job or social policy or health policy or housing policy or employment policy or unemployment policy or child policy or alcohol policy or education policy or family policy or social security policy or welfare policy or welfare provision or social services or social insurance policy or social insurance or benefit policy or pension policy of accident policy or unemployment policy or immigrant policy or migrant policy or refugee policy or gender policy or mental health or mental health policy or mental illness or mentally ill or mental health services or long-term sick or long-term sick benefits or housing benefits or satisfaction with accommodation or responsibility of government for housing or responsibility of individual for housing or living standards or living conditions or community-based social services or third sector social services or social economy social services or voluntary sector social services or tax or taxation or social benefits and services cost too much in taxes and charges or progressive taxation or progressive tax or tax resistance or support for progressive tax or perceived tax burden or justice of taxation or tax fairness or prefer tax relief before improved public service or distributive tax or redistributive tax or distributive taxation or redistributive taxation or (media and welfare) or (mass media and welfare perceptions))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare) attitudes or perceptions or values or beliefs or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes) AND (social justice or distributive justice or redistributive justice or justice beliefs or anti-egalitarian values or anti-egalitarianism or economic justice beliefs or political justice beliefs or egalitarianism or egalitarian values or redistribution or income redistribution or should high income earners have higher pensions as they have paid in more or should higher earners get more in unemployment benefit as they have paid in more or support for welfare redistribution or endorsement of market inequalities or whether government should reduce inequalities or income difference is necessary or it is just that people with higher income can buy better health care or it is just that people with higher income can buy better education or it is unjust that people with higher income can buy better health care or it is unjust that people with higher income can buy better education or inequality or leveling off incomes or guaranteed minimum income or national minima or basic income or minimum wage or perceived inequality or earning inequality or social inequality or economic inequality or perceived ideal of inequality or perceived reality of inequality or income inequality or class inequality or gender inequality or social benefits and services lead to a more equal society or equality or equity or economic equality or social equality or gender equality or gender role equality or income equality or class equality or vertical equality or horizontal equality or poor rich divide or poor-rich divide or differences between poor and rich or opportunity or equal opportunity or equality of result or equality of outcome or equality of opportunity or equality of treatment or socio-economic security or socio-economic equality or fairness or fair treatment by officials or judged by differences in people’s standard of living or whether it is just to eliminate big inequalities in income between citizens and guaranteeing basic income for all or solidarity or welfare state solidarity or welfare solidarity or enlightened self-interest or concern or general solidarity attitudes or beliefs on welfare redistribution or welfare states end informal solidarity or welfare states end civic morality or concern or solidarity with elderly or solidarity with sick or solidarity with unemployed or solidarity with disabled or solidarity with immigrants or solidarity with fellow countrymen or solidarity fellow Europeans or human solidarity or global solidarity or social legitimacy or legitimacy or legitimacy crisis or welfare state legitimacy or social inclusion or welfare legitimacy or social cohesion or cohesion or weakening values or weakening morality or decline of values of decline of morality or loss of values or loss of morality or anomie or anomia or risk or risk society or individualisation or material vulnerability or protection against poverty due to sickness or protection against poverty due to unemployment or protection against poverty due to old age or threat or economic threat or perceived risk or identity or religious identity or social identity or national identity or European identity or regional identity or global identity or pride or national pride or regional pride or national attitudes or national attitude))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or welfare state regime or welfare regime or (production regime and welfare)) AND (attitudes to political authorities or attitudes to political actors or attitudes to political agents or attitudes to political parties or political system or political regime or majoritarian democracy or federal system or support for federal system or support for federal institutions or support for federal welfare provision or support for federal welfare institutions or role of federal government or role of federal institutions or consensus democracy or state institutions or role of state institutions or ideology or conservatism or liberalism or reformism or socialism or social-democrats or libertarianism or neo-liberalism or environmentalism or popularism or leftist or rightist or centre-right or centre-left or right or left or satisfaction with democracy or satisfaction with political actors or satisfaction with politics or satisfaction with political regime or satisfaction with politicians or satisfaction with parliament or satisfaction with politics or satisfaction with institutions or satisfaction with political institutions or satisfaction with social institution or satisfaction with regional institutions or satisfaction with national institutions or satisfaction with EU or satisfaction with international institutions or satisfaction with the European Union or satisfaction with Nato or satisfaction with the UN or satisfaction with international organisations or support for democracy or weakness of democracy or belief in democracy or strong leadership or strong leader or weak leadership or weak leader or beliefs in functioning of political system or attitudes to political system or identification with political party or political interest or partisanship or entrenched interest or retrenchment or restructuring or recalibration or reforming or reforms or sense of civic duty to vote or voting or duty to vote or membership of a political party or membership of a social movement or membership of a organization or membership of a group or membership of a social group or membership of a political party or activist or activism or network or networks or social networks or social network or voluntary work or community work or frequency of discussions of political matters or importance of politics or politics in daily life or willingness to join political actions or willingness to occupy building or factories or political activity or regular political activity or irregular political activity or formal political activity or informal political activity or protest or demonstration or manifestation or political views or political involvement or political orientation or political affiliation or party preference or political participation or deliberation or political culture or formal political participation or informal political participation or most important policy issue or perception of ideological differences between parties or self-placement on left- right ideological scale or placement of parties on left-right ideological scale or left-right scale or respondent's subjective understanding of politics or distance to government or attitudes to electoral system or attitude to trade unions or the difference trade unions make or trade unions or organised workers or relative importance of life domains or political ideology or political satisfaction or left-right political orientation or political value or ideology or ideological values or subjective left-right placement or electoral participation or religious participation or individuals beliefs or personal beliefs or postmaterialism or post-materialism or materialism or postmaterial beliefs or material belifs or basic rights or human rights or moral economy or moral sentiments or human capabilities or respect of others or attitudes to political opponents))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social services or social programs (tax and (distribution or redistribution or justice or welfare) or) or attitudes or perceptions or values or beliefs or public attitudes or popular attitudes or social attitudes or public perceptions or popular perceptions or public preferences or popular preferences or public values or popular values or public perceptions or popular perceptions or public beliefs or popular beliefs or public norms or popular norms or social norms or individual norms or norms or mass attitudes or stereotypes or attitude persistence or attitude strength or attitude change or attitude structure support or demand or attitude resistance or modification of attitudes)) AND (state responsibility or responsibility of government or extensity of government responsibility or intensity of government responsibility or range of government responsibility or degree of government responsibility or government responsibility or range of government policy responsibility or degree of government policy responsibility or scope of government or role of government or collective responsibility or public responsibility or individual responsibility or personal responsibility or choice or individual choice or personal choice or range of government action or degree of government action or intensity of government action or extensity of government action or reduce income differences or provide jobs for all or basic income for all or attitudes to the size of government or size of government or attitudes to the power of government or state care or welfare state responsibility of government expenditure or government spending or range of activities for which the government is held responsible or degree of government activity within each policy area or perception of social problems or perception of political problems or perception of public problems or perception of popular problems or importance of problems or importance of social problems or importance of political problems or importance of public problems or importance of popular problems or social policy goals or goals of social policy or public policy goals or goals of public policy or welfare policy goals or goals of welfare policy or welfare state policy or welfare policy goals or socio-economic security or socio-economic equality or security or protection or social programs or social services or support for more public ownership or support for more economic management or support for privatization or support for outsourcing or support for deregulation or attitudes to privatization or attitudes to deregulation or attitudes to outsourcing or attitudes to public ownership or attitudes to economic management or economic intervention or economic liberation or free market or laissez-faire or state ownership or equality policies or demand for regulation or support for regulation or attitudes to regulation or personal initiative or citizenship responsibility or universal responsibility of government or universalism or universal rights or universal access or de-universalisation of social security or de-universalisation of welfare or de-universalisation of welfare state or residualisation of social rights or residualisation of welfare state or residualisation of welfare or targeted benefits or targeted services or means-tested benefits or means-tested services or means-tested or targeting or social assistance system or AFDC or insurance benefits or unemployment benefit system or pension system or accident insurance or decommodification or de-commodification or re-commodification or recommodification or residual welfare state or minimal welfare state or generous welfare state or encompassing welfare state or comprehensive welfare state or safety net or welfare performance or welfare state performance or welfare outcomes or welfare state outcomes or generous social security provision or residual social security provision or progressive social policy or regressive social policy or government intervention))

((Welfare or social protection or social security or social insurance or social policy or public policy or social programmes or social programs or social services or (tax and (distribution or redistribution or justice or welfare) AND (attitudes to government ownership or support for reduction or support for expansion or support for increase or support for decline of social services or decline of social services or decline of social benefits or attitudes towards unemployment policy or attitudes to government spending or support for increased spending on social security or support for increased spending on old age pension or support for increased spending on health care or support for increased spending on unemployment benefits or guarantee a minimum level of support or private provision or active welfare state or passive welfare state or subsidiary or subsidarity or welfare capitalism or varieties of capitalism or social capitalism or moral economy of welfare or public attitudes towards government provision or perceived adequacy of the running health care system or attitudes to social spending or wish to see more government spending or wish to see less government spending or whether the respondent favors government spending on declining industries for the purpose of protecting jobs or whether the respondent favours government spending on declining industries for the purpose of protecting jobs or postmaterialist spending or materialist spending or beneficial involvement or self-interest or socialization or economic self-interest or support for more welfare spending or attitudes to expansion or attitudes to contraction or more government spend or less government spend or less government regulation or more government regulation or social reforms have gone too far or attitude to welfare regime’s generosity or cuts in public services or reductions in public services or welfare provision by the state or financing welfare or how should services be financed or responsibilities of EU or responsibilities or the European Union or attitudes to the European Union’s role in welfare or attitudes to the European Union’s role in social policy or Euroscepticism or preferences regarding the range of governmental action o or preferences regarding the degree of governmental action or satisfaction with welfare benefits or satisfaction with welfare outcomes))

**Appendix 3- Author & year, Survey and Method used**

|  |  |  |
| --- | --- | --- |
| Author & Year | Survey | Method |
| Concern |  |  |
| Van Oorschot & Uunk, 2007 (bookchr) | EVS 1999-2000 | MLM |
| Van Oorschot, Arts & loek (2005) | EVS 1999/2000 | OLS |
| Van Oorschot & Uunk, 2007 | EVS 1999-2000 | MLM |
| Van Oorschot (2008) | EVS 1999-2000 | Bivariate analysis of aggregate and country level values |
| Van Oorschot (2006) | EVS 1999/2000 | Bivariate and logit |
| Van Oorschot (2008) (bookchr) | EVS 1999/2000 | Bivariate and logit |
| Areas |  |  |
| Berg 2007 | Eurobarometer 2004; National Swedish survey- SOM 2004 AND Swedish European Parliament election study 2004 | Logit |
| Burgoon 2009 | Eurobarometer 2002 | MLM |
| Taylor-Gooby & Rose (2010) | Focus groups in UK and Germany | Focus groups in UK and Germany |
| Bolzendahl & Olafsdottir 2008 | ISSP 1994 AND 2002 | Logit |
| Saxonberg et al. (2006) | ISSP 1994 AND 2002 | SEM |
| Gevers J; Gelissen J; Arts W; Muffels R | Eurobarometer 44.3 | MLM |
| Pfeifer (2009) | Eurobarometer 56.1 2001 | OLS |
| Velladics & Henkens (2006) | Population Policy Acceptance Survey early 1990s amd 2000-2003 | Multinominal logit regression |
| Lynch & Myrskyla (2009) | Eurobarometer 37.1 1992 and 56.1 2001 | OLS |
| Gelissen (2001) | Eurobarometer 37.1 and 44 | Multinominal logit regression |
| Taylor-Gooby (2004) | Eurobarometer 56.1 2001 | Logit |
| Duman (2010) | ISSP (2007) | Probit |
| Petterson (2007) | ESS 2002 | OLS regression |
| Mixed studies |  |  |
| Smith & Polyani (2003) | WVS 19951997 | Logit |
| Larsen (2006) | WVS: 1990-93;1995-1997;1999-2001; Eurobarometer: number 5 from 1976, number 31a from 1989, number 40 from 1993 and number 56.1 from 2001;ISSP:1992,1999; The Nordic Citizenship, Marginalisation and Unemployment Data:1998/99;The national sample- an additional module to the Danish ISSP 2004 | Descriptive statistics; OLS regression analysis; logistic regression analysis |
| Svallfors (2004) | ISSP 1996 | OLS |
| Taylor-Gooby (1999) | ISSP | Logit |
| Roller, E (1995) | ISSP 1985, 1987 AND 1990; Political Action 1973 and 1976; Eurobarometer number 11 from 1979, number 16 from 1981 and number 19 from 1983 | OLS |
| Borre (2003) | ISSP Role of Government 1990-1998 and Danish National Election Surveys 1990-1998 | Factor and bivariate analysis |
| Saxonberg (2005) | ISSP 1996 | SEM |
| Larsen (2008) | wvs 1990 and ISSP | OLS |
| Edlund (2007) | ISSP Role of Government 2 1996 | LCA |
| Nordlund (1997) | Four surveys conducted in Norway and Denmark in 1990 and Sweden in 1992 | Bivariate and chi-square |
| Bean & Papadakis 1998 | ISSP 1985/6 AND 1990 | OLS regression |
| Pettersen, P.A (1995) | ISSP 1985 and 1990; Cultural change in the Netherlands 1970/75/80/85/86/87; British Social attitudes study 1985; British election study 1974/79/83/87; National election studies in Sweden 1960/64/68/70/73/76/79/80/85/88/91, Norway 1965/69/73/77/81/85/89/93, Finland 1975/80/85 and Denmark 1964/69/73/74/78/79/84/87/88/90 | OLS |
| Government responsibility | |  |
| Jaeger (2007b) | ISSP Role of Government 2 1996 | Probit - CHOPIT |
| Luo (1998) | ISSP 1985 Role of Government | SEM |
| Kalenthaler & Ceccoli (2008) | WVS | Probit |
| Forma& Kangas (1999) | International survey of economic attitudes 1994/5 | OLS |
| Peillon (1996) | ISSP 1990 | QCA |
| Andersson (2010) | ISSP 2006 Role of government Government IV | IRT Mokken Scaling and regression (blockwise) |
| Taylor-Gooby (1998) | ISSP 1985, 1990, 1996 | Bivariate descriptive |
| Koster (2009) | EVS/WVS 1992 and 2002 | MLM |
| Kumlin (2007) | ESS 2002 | OLS regression |
| Gelissen (2000) | Eurobarometer 37.1 (1992) | MLM |
| Svallfors (2003) | ISSP 1996 | Factor analysis and OLS |
| Tworzecki (2000) | Party Systems and Electoral survey conducted by Central European University in Budapest, asked in 1992, 1993, 1994 | OLS |
| Breznau 2010 | International survey of economic attitudes; | SEM |
| Goerres & Tepe (2010) | ISSP 2001 only including 55+ population! | Logit |
| Inequality |  |  |
| Laczko (2005) | ISSP 1992 AND 1999 | OLS |
| Aalberg (2003) | wvs 1981/1990/1996; ISSP 1987/1992 | Only means and descriptive. Creation of scale but no factor analysis. |
| Sachweh & Olafsdottir (2010) | ISSP 1999 | Multinominal logit regression |
| Taylor-Gooby (2008) | ISSP 1999 | Descriptive statistics; Logistic regression |
| Kalenthaler, Ceccoli, Gelleny (2008) | EVS 200-1 | Probit |
| Redistribution |  |  |
| Svallfors (2006) | Chapter 4 ISSP Social Inequality 1992 AND 1999; Chapter 5 ISSP Role of Government 1996 and Swedish data from mid 1980s | Bivariate and OLS |
| Kumlin & Svallfors (2007) | ESS 2002 | MLM |
| Coreneo 2000 | ISSP Social Inequality II 992 | Logit |
| Sabbagh & Vanhuysse (2006) | International research project on justice perceptions and welfare attitudes amongt 2,075 university students in 8 countries (USA, Canada, Norway, Sweden, the Netherlands,France, Australia and New Zealand; ISSP and ISJP | Factor analysis |
| Svallfors (1997) | ISSP Social Inequality II 992 | OLS |
| Verneby & Finseraas, 2010 | Comparative Manifesto Project, WVS 1990-2000 | MLM |
| Crutchfield & Pettinicchio, 2009 | WVS | Bivariate |
| Edlund (1999) | ISSP 1991 | MCA |
| Edlund (2003) | ISSP 1996 Sample restricted to famiies in which both adults have an assigned class position includes bouth married couples and cohabiting couples | Logit |
| Mau, S in Glatzer (2002)chapter 15 | ISSP 1990 AND 1996 | Bivariate and regression |
| Matheson & Wearing (1999) | ISSP Role of Government 1990 and 1992 Social Inequality | OLS regression |
| Kenworthy & McCall (2007) | OECD 2006; LIS 1985, 1990, 1995, 2000; issp 1987, 1992, 1999 and ISSP 1985, 1990 and 1996 for some countries | Regressions |
| Edlund (1999) | ISSP 1992 | MCA |
| Corneo 2000 | ISSP Social Inequality II 992 | Logit |
| Cusack et al. (2006) | accumlated ISSP waves for opinion data, labour-force survey data, ILO | Logit |
| Dancygier & Saunders, 2006 | 1996 German Social Sruvey, ZUMA 1997, 1997 British General Election Cross-Section Survey | Logit |
| Linos & West (2003) | ISSP 2 | OLS |
| Crepaz (2008) | WVS 2000 | OLS; Logit; MLM (logit) |
| Rehm (2007) | ESS 2002/2003 | Probit |
| Crepaz chapter 3 in Kymlicka & Banting, 2006 | WVS 1990,1995-7, 1999-2001 | OLS; Logit; MLM (logit) |
| Mau & Burkhardt, 2009 | ESS 2002/2003 | MLM |
| Senik et al., 2008 | ESS 2002/2003 | Probit |
| Andreβ H.-J; Heien. T 2001 | ISSP 1992 | SEM |
| Jaeger (2006) | ESS round 1 and 2 | Probit |
| Jaeger (2007) | ESS round 1 and 2 | Probit |
| Rehm (2009) | ESS round 1 and 2 | Probit |
| Finseraas (2008) | ESS round 1 | Logit |
| Finseraas (2009) | ESS round 1 | MLM (Multinominal) |

**Appendix 4 – Author & Year, outcome variable, research question**

|  |  |  |  |
| --- | --- | --- | --- |
| **Author & Year** | **Outcome variable** | | **Research question** |
| **Concern** |  | |  |
| Van Oorschot & Uunk, 2007 (bookchr) | Concern for immigrants compared to their concern for the elderly, sick and disabled people and unemployed people; dependent variable the difference in concern with immigrants and concern with the elderly | | "This chapter investigates these central questions by exploring the effects of a nation's welfare spending and immigration levels on its residents' relative informal solidarity towards immigrants, that is their (informal) solidarity towards immigrants compared to their (informal) solidarity towards other needy groups in society" (p.217) |
| Van Oorschot, Arts & loek (2005) | Concern for the elderly, sick and disabled people and unemployed people | | "This article tests whether state-organised solidarity substitutes social capital and informal solidarity" (abstract) |
| Van Oorschot & Uunk, 2007 | Concern for the elderly, sick and disabled people and unemployed people; dependent variable is the difference in concern with immigrants and concern with the elderly | | Relationship between generosity of welfare systems and populations concern for immigrants compared to their concern for the elderly, sick and disabled people and unemployed people; dependent variable is the difference in concern with immigrants and concern with the elderly |
| Van Oorschot (2008) | Concern- Informal solidarity the difference in concern with immigrants and concern with the elderly | | What influences national levels of informal solidarity towards immigrants in Europe- dependent variable is the difference in concern with immigrants and concern with the elderly |
| Van Oorschot (2006) | Concern- informal solidarity towards four groups of needy people (To what extent do you feel concerned about the living conditions of: – elderly people in your country – unemployed people in your country – immigrants in your country – sick and disabled people in your country? ) When used as a dependent variable for conditionality People equally concerned about the living conditions for all groups = 0 in other words the higher score in the logit means that respondents differentiated more among needy groups | | "This article aims at contributing to a theoretical and empirical understanding of the popular cultural context of welfare rationing. It examines European public perceptions of the relative deservingness of four needy groups (elderly people, sick and disabled people, unemployed people, and immigrants)." (abstract) |
| Van Oorschot (2008) (bookchr) | Concern- informal solidarity towards four groups of needy people (To what extent do you feel concerned about the living conditions of: – elderly people in your country – unemployed people in your country – immigrants in your country – sick and disabled people in your country? ) When used as a dependent variable for conditionality People equally concerned about the living conditions for all groups = 0 in other words the higher score in the logit means that respondents differentiated more among needy groups | | "Here we aim at contributing to an understanding of the popular cultural context of welfare rationing by examining European public perceptions of the relative deservingness of needy groups and variations in conditionality among Europeans" (p.268) |
| **Areas** |  | |  |
| Berg (2007) | EU- preferences for public or private management of public services; EU preferred decision level for social policy (index)- national level 0 EU level 1 | | "The specific aim of this study is to theoretically develop, and empirically investigate, how individuals' territorial attachments influence their political trust and welfare attitudes in various institutional settings" (p.8)"how the level dimension affects the following attitudes: general welfare attitudes, preference for public or private management of welfare services, preferred decision level for welfare issues, and solidarity with other EU citizens" (p.116) "The second question concerns the dimension form of attachment and how it relates to the preferred decision level for welfare issues and to solidarity with other EU citizens" (p.116) "The third question concerns the role of the strength of territorial attachment dimension. As stated earlier, the mechanism of the deservingness criterion of identity only affects the perception of who is worthy of support, not necessarily to what degree" (p.116); The fourth and final question concerns the combined effects of these three dimensions, when investigated as the effect of a combined variable, measuring the level or levels to which a person feels the strongest attachment" (p.116). |
| Burgoon (2009) | EU responsibility - 'whether the fight against poverty and social exclusion..ought to be a priority objective of the European Union from 1- strongly disagree to 5 strongly agree AND should a country's government provide a decent standard of living for the unemployed scale from 1 strongly disagree to 5 strongly agree | | The article investigate 'how national social policy affects public support for EU-level welfare assistance and how EU-level transfers affect support for national welfare assistance' (p.428); 'the focus is on: (1) how the generosity of national-level welfare policies directly affects individual support for EU-level social policy and mediates how economic insecurities affect that support; and (2) how receipts of EU-level social-related or total Structural Funds affect individual support for national social policy and mediate the way economic insecurities affect that support' (p.429). |
| Taylor-Gooby & Rose (2010) | Fairness in social provision | | "We seek to contribute through cross-national comparative work that explores the meanings associated with particular ideas about welfare in different national contexts" (p.88) "The objective is to investigate whether popular ideas meet the legitimization needs of welfare states, in settings representing two different regimes" (p.100) |
| Bolzendahl & Olafsdottir (2008) | Family/gender- Paid maternity leave; to what extent do you agree or disagree: working women should receive paid maternity leave when they have a baby? 2 Financial benefits: And to what extent do you agree or disagree: Families should receive financial benefits for childcare when both parents work? Both answers measured on a five point scale from strongly disagree to strongly agree | | study public support for paid maternity leave and financial childcare benefits in the USA compared to two other liberal welfare regimes. "Specifically we ask the following: (1) how do the levels of support for family policy in the US compare to those in other liberal welfare states? (2) how do gender and gender attitudes matter as a source of policy support in the US compared to other liberal welfare states? and (3) have levels and sources of support changed over time? |
| Saxonberg et al. (2006) | Family/gender- state support to families (working women should receive paid maternity leave when they have a baby; families should receive financial benefits for child-care when both parents work | | "This article discusses the relationship between gender attitudes and gender policy in Central Europe and the latest changes in both" (abstract) |
| Gevers et al. (2000) | Healthcare- level of support for the welfare state with respect to the provision of health care services (measured using 3 items 5 point scale of agreement to the government should provide everyone with only the essential services such as care for serious diseases, and it should encourage people to provide for themselves in other respects, it is impossible for any government or public or private health insurance scheme to pay for all new medical treatments and technologies and here are 3 opinions please tell me which one comes closest to your own? 1 the government has to ensure that health care is provided to all people residing legally here, irrespective of their income 2 the government has to ensure that health care is provided only to those people residing legally where with low income, the government does not have to ensure that health care is provided to people residing legally here not even those with lower income) | | Which factors explain intra- and inter-country variations in levels of public support for national health care systems within the European Union and why? |
| Pfeifer (2009) | Minimum income protection Index of 3 items (the government should provide everyone with a guaranteed basic income, the government should provide decent housing for those who cannot afford it, the government should provide a decent standard of living for the unemployed) | | "In this article I investigate attitudes towards a subfield of European welfare states in comparative perspective: minimum income protection" (abstract) |
| Velladics & Henkens (2006) | Pension - Ageing anxiety (‘What is your opinion about the rising number of people aged 65 and over?’ The five response categories were ‘ 1 ’ excellent, ‘2’ good, ‘3’ neither good nor bad, ‘4’ bad and ‘5’ very bad); preferred pension reforms (‘How would you like retirement benefits to be ensured in the future ? ’ and to select one of six policy options: ‘ 1’ raise the retirement age, ‘2’ raise monthly taxes, ‘3’ lower monthly benefit payments to pensioners, ‘4’ require that children support their parents, ‘5’ abolish early retirement schemes, and ‘6’ make old-age benefits dependent on the number of children. In Germany, an additional option was offered: ‘7’ other); retirement age (‘When do you expect to retire ?’ and ‘ If you were able to decide, at which age would you like to retire ? ’) | | "This article examines whether the different welfare states of the European Union member states engender different policy preferences and attitudes among the population. More specifically, it investigates variations in attitudes towards population ageing and pension reforms, and variations in people's retirement age preferences and expectations" (abstract) |
| Lynch & Myrskyla (2009) | Pension- pension policy support - 3 measures- desired level of public pensions' whether the current PAYGO structure, in which taxes on current workers pay for the benefits of current pensioners, should be maintained; whether the current retirement age should be raised and whether other social spending should be cut to maintain pension benefits at their current levels (last 2 only in 2001 survey) | | "Does receiving more benefits really make an individual more likely to oppose retrenchment or restructuring? In this article we draw data from two European survey programs to test empirically which of three hypothesized sources of opposition to retrenchment or reform of public pension systems is the most important determinant of public attitudes among the population aged 45 and older" (p.1069) |
| Gelissen (2001) | Pensions- attitudes towards pension provision/responsibility - Level of solidarity of pensions measured as a multi-item measure based on 3 items (the net replacement ratio-the percentage of the original income that is replaced by the pension; the private pension fund assets as a percentage of GDP; the relative share which)/who should be responsible for pensions: the state only or the individual only (Eurobarometer 44.0 answer categories state only, individual only or both)/How should pensions be provided (from Eurobarometer 37.1; mainly by the authorities, financed from contributions or taxes; mainly by employers, financed from their own and their employees' contributions; mainly by private contracts between individual workers and pension companies); | | Whether and to what extent is there an association on the country level between the public attitudes on the one hand and the operating type of welfare state regime and more specific characteristics of the pension system on the other. |
| Taylor-Gooby (2004) | Unemployed- Old social risk measures: The government should provide a job for everyone who wants one; the government should provide a decent standard of living for unemployed people; New social risk measures: Unemployed people should be forced to take a job quickly, even if it is not as good as their previous job; unemployed people should be given the time and opportunity to improve their education and skills. | | "This paper examines attitudes to new social risk labour market policies in four contrasting European countries." (abstract) |
| Duman (2010) | Unemployment- Spending on unemployment benefits - do respondents want to see higher,lower or the same level of government spending on unemployment benefits | | To attempt to look at the link between labor market risks and social insurance demands by taking occupational unemployment rates, and specificity of skills into account' (from abstract) |
| Petterson (2007) | Welfare dissatisfaction - Evaluation of Welfare State related outcomes (the state of health services in [country] and the state of the education in [country] - placed from 0 extremely bad to 1- extremely good | | "We are interested in how welfare state dissatisfaction might be related to other forms of political action than voting, which takes place only within certain intervals, but we exclude political consumerism and illegal activities" (P.151) |
| **Mixed studies** |  | |  |
| Smith & Polyani (2003) | Governments responsibility- poverty- Socially oriented norms (government response to poverty- is the government doing too much, too little or about the right amount for people in poverty) | | "To explore a model of social capital, specifically the association between socially oriented norms and behaviours and the effect that these factors have on the gradient between income and self-rated health across three different welfare states" (abstract) |
| Larsen (2006) | The author uses a range of measures of support for the welfare state in the book. These are:  Public support for welfare; attitudes to the poor and unemployed; deservingness; attitudes to the living conditions of the poor and unemployed; Times high status occupations ought to earn more than a skilled factory worker; times skilled factory worker ought to earn more than the unskilled factory worker; perception of control of neediness; public support for welfare policy; perceptions of job opportunities; level of generosity; public support for social assistance; attitudes towards spending; living standard that should be provided; connection between perception of the share of immigrants on social assistance and spending on social assistance ; connection between perception of share of immigrants among social assistance claimants and provided living standard; relative and absolute support for social assistance in a social democratic regime; general perception of work ethic among claimants of social assistance; work ethic among immigrants on social assistance; public support for welfare policy in Britain from 1983-2002 measured as: share in favour of increased spending on health education, and social benefits; share in favour of increased spending on welfare benefits for the poor; public support for welfare policy in Sweden from 1986 to 2002 measured as: share that finds reduction in public sector a bad proposal, share in favour of maintaining or increasing public spending on social assistance; public support for welfare policy in Denmark from 1973- 2001 measured as: proportion of voters that 1) want to maintain or increase spending on social assistance 2) want to maintain social reforms at least at present level and 3) who disagree that too many receive social benefits without needing them; share explaining poverty with 'laziness and lack of will power in selected Western countries in the period from 1976 to 2001. Regression model in table 5.2- have 4 models with the same dependent variable: proportion answering in poverty caused by 'laziness and lack of will power' ; table 5.3: share answering 'in control, ; table 5.4: poor being in control of poverty ( where 1= laziness and 0=one of the three other answers); table 5.6: show cross-national differences in perceptions of control of neediness by share that explains poverty with 'laziness' which is used as independent variable, regression run for different dependent variables 1) share that agrees with 'redistribution; 2) share that agrees with provide jobs to all 3) share that agrees with 'provide basic income', 4) index 0-6 (created by Svallfors 1997)?; share explaining poverty with 'laziness and lack of will power' (use data from WVS 1990-1993 and Eurobarometer 1976/89/93/2001 and compare over public support for welfare; attitudes to the poor and unemployed; deservingness; attitudes to the living conditions of the poor and unemployed; time) ; Correlations between perceptions of control of neediness and public support for welfare policy- correlations at individual level within each country and overall correlation at individual level; judgement of how often people tend to look down on recipients of different social benefits (show percentage answering 'very often' or 'often' and percentage difference - 'very often' and 'often' minus 'quite rarely' and 'very rarely' for each of the Nordic countries on old-age basic pensions, child allowances, housing allowances, disability pension, unemployment benefit, social assistance, early retirement); the experience of being 'looked down on' among long-term unemployed due to receiving unemployment or social assistance in Finland and Denmark (measured as very often, quite often, quite rarely, hardly ever, percentage difference); personal feeling of being looked down on as a problem of being unemployed ( for Finland and Denmark, reported as 10 point scale); Relationship between financial hardship and feeling of stigmatisation as a problem of being unemployed; distributions of perception of job opportunities, level of generosity and work ethic ( Denmark 2004, reported as per cent); attitudes towards immigrants' entitlement to social support during unemployment in a social democratic regime; spending on social assistance; public support for social assistance; the living standard that should be provided; legitimate income differences in Sweden, Germany and the USA in 1992; judgement of how often people tend to look down on recipients of different social benefits experience of financial hardship among Danish and Finnish long-term unemployed (measured as often or sometimes difficulties in paying current expenses; rarely or never difficulties in paying current expenses, would be able to pay unexpected bill, would not be able to pay unexpected bill, very or rather confident in economic situation the next 3-5 years, very or somewhat insecure in the economic situation the next 3-5 years, also include hardship index); table 7.5: feeling of stigmatisation as a problem of unemployment measures of public support for social assistance- spending on social assistance ( too little money, the right amount of money, too much money), a public responsibility to provide decent living standard for recipients of social assistance (fully agree, partly agree, partly disagree, fully disagree, don’t know), how high a living standard should the public provide recipients of social assistance (7 is the public should provide a living standard that equals that of an ordinary wage earner to 1 which is the public should provide a living standard that just enables one to get by, don’t know) | | To search for the mechanisms that link the macro-structure of welfare regimes to the microstructures of public opinion towards welfare policy- call it a search for the missing link or the intervening variables. The author borrows insights from the institutional line of reasoning and questions two other popular explanations of cross-national differences in welfare attitudes. Firstly the claim that low support for welfare policy primarily has to do with the presence of ethnic heterogeneity. The second popular explanation of cross-national differences is the 'culture thesis’, which claims that lower support in the USA and other liberal regimes is caused by a 'passion for freedom over inequality'. Chapter 2 discusses welfare regime theory. Chapter 3: review of studies looking for a connection between the distinction between social democratic, conservative and liberal welfare regimes and public support for welfare policy. Chapter 4: presents the theoretical framework Chapter 5:analyse how the three regime dimensions: job opportunities, degree of selectivism and degree of generosity and ethic fractionalisation influence public explanations of causes of poverty Chapter 6 and 7: supplement the empirical analysis of chapter 5 thus chapter 6 look at degree of selectivism and chapter 7 degree of generosity. Chapter 8:applies the theoretical framework on a national sample. Chapter 9: summarises the theoretical argument and the main findings and discuss the implications for the welfare regime theory, to what extent regime-dependent public support for welfare policy actually influences the pursued welfare policy, the notion of path-dependency in relation to public support for welfare support and lastly the future public support for welfare policy in the light of recent trends in welfare state development and immigration |
| Svallfors (2004) | Government responsibility- Support for government intervention index- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; keep prices under control; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor?; give financial help to university students from low-income families; provide decent housing for those who can’t afford it?/ Welfare spending index (listed below are various areas of government spending. Please show whether you would like to see more or less government spending in each area. Remember that if you say 'much more', it might require a tax increase to pay for it. Health, old-age pensions and unemployment. Swedish data: Spending index (rates are used for different purposes. Do you think that the amount of tax money used for the following purposes should be increased, remain unaltered, or decreased? Medical and health care/support for the elderly/support for families with children/housing allowances/social assistance/employment policies) Finance index (how do you think the following services should be financed? health services/childcare/care for the elderly as well as primarily through taxes and employer contributions (1) to a larger extent through special fees from those who use the service- sickness insurance/unemployment insurance/pensions); Service index (Who do you in general consider to be best suited to deliver the following services? education/health services/childcare/care for the elderly/social work | | "In this article, attitudes towards welfare policies among different classes in Sweden are compared with other Western countries and over time" (abstract) |
| Taylor-Gooby (1999) | Inequality- support for market provision - redistribution - level of agreement with 3 variables government should reduce inequalities, progressive tax and income differences are necessary; perceived reality and aspiration of 5 types of images of inequality across countries; perceived and ideal pay for unskilled worker, factory owner, shop assistant, lawyer; support for market provision- shown as should higher incomes buy better services in education and health care (measured as whether it is just or unjust that people with higher income can buy better health care/education than people with lower incomes); support for a redistributive state by older people ( 54+), working women, working in sheltered sector, working in private sector, endorsement of market inequalities by older people ( 54+), working women, working in sheltered sector, working in private sector | | How the shift to the Silver age of welfare, often distinguished with market values such as inequality, incentives, competition and indifference to social justice, affect welfare values, concerned with fairness, redistribution and greater equality, and how well regime types applies to values etc of citizens |
| Roller (1995) | Equality of opportunity- Redistribution - Government responsibility; Support for different socio-economic equality policies measured as: equality of opportunity (measured as 'the government should provide more chances for children from poor families to go to university) and equality of result which is divided into two dimensions 1) national minimum again divided into two items 1.1 the government should provide a job for everyone who wants one 1.2 the government should provide everyone with a guaranteed basic income. 2) Redistribution measured by two items 2.1 the government should reduce the differences in income between people with high incomes and those with low incomes- this variable is called reduction of differences in income 2.2 People with high incomes should pay a larger proportion of their earnings in taxes than those with low incomes this variable is called 'progressive taxation' | | Examining expectations about the welfare state in Western Europe, specifically support for policies to achieve socio-economic quality. Socio-economic equality defined as equality of opportunity, equality of result. Hyp 1: declining support for socio-economic equality because members of the middle mass are dissatisfied with the redistributive effects of taxation because they consider themselves to be the financiers of poverty, a situation from which they have happily escaped. Alternative Hyp 1: expectations/support for socio-economical equality increase as new inequalities are continuously identified. Hyp 2: expectations about materialist equality policies should decline while, at the same time, expectations about postmaterialist policies should increase. Alternative Hyp 2: expansion of expectations about all socio-economic equality policies as old and new politics emerge and old agendas too incorporate aspects of the new politics. |
| Borre (2003) | Government spending- extent and area (should expenditure on an item be increased lot or a little, stay the same as they are at present or whether they should be decreased a little or a lot: environment, health, law enforcement, education, defence, retirement, unemployment benefits and culture and arts) | | "The purpose of this paper is to explore these attitudes, which we shall term 'budget demands', in other surveys in Denmark, Norway and Sweden" (p.169) |
| Saxonberg (2005) | Government responsibility- Redistribution Big Public sector (government responsibility for providing housing, healthcare and providing jobs; attitudes towards increased spending on unemployment benefits, pensions, education, healthcare and job creation); Equality (support for income redistribution, wage control and price control, and supporting higher taxes for those with high and medium incomes) | | "This article compares the socio-economic determinants of welfare attitudes in the Czech Republic to those in Sweden" (abstract) |
| Larsen (2008) | Redistribution - Cause of poverty- Why are there people in this country who live in need (unlucky/laziness/injustice in society/inevitable part of modern progress); attitude to redistribution, provide jobs to all and provide basic income to all | | "This article aims to establish a new theory that explains how characteristics of the three welfare regimes influence attitudes toward welfare policies that concern the living conditions of the poor and unemployed" (p.148) |
| Edlund (2007) | Redistribution - Government responsibility- It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes; Listed below are various areas of government spending. Please show whether you would like to see more or less government spending in each area. Remember that if you say 'much more' it might require a tax increase to pay for it [B] Health, [C] Education, [D] Old age pensions, [E] Unemployment benefits; On the whole, do you think it should be or should not be the government's responsibility to [F] provide a job for everyone who wants one, [G] Provide health care for the sick, [H] Provide a decent standard of living for the old, [I] Provide a decent standard of living for the unemployed, [J] Reduce income differences between the rick and poor, [K] Give financial help to university students from low-income families, [L] Provide decent housing for those who can't afford it; Generally, how would you describe taxes in (country) today? [M] for those with high incomes, are taxes .... | | "In this chapter, the phase II argument [different types of welfare state institutions, employment structures, and, thus, social stratification patterns tend to cluster into specific configurations, each promoting a distinct conflict scenario related to welfare policy] is confronted with an alternative hypothesis in which the path dependency of the institutionally embedded organized interests' strategies and rhetoric is central. Moreover, it is argued that the institutional feedback effect specified by the phase II argument is of minor importance compared to the feedback effects propelled by the welfare state in terms of size, risk profile and redistributive capacity" (p.?) |
| Nordlund (1997) | Government spending- Government responsibility- misuse- Variables can be structured into 4 aspects of Social Policy: Public expenditure (medical and health care/support for the elderly/support for families with children/employment policies/housing allowances/social assistance/public administration); financing (health care/child care); service delivery (health care/child care/care for elderly) and misuse (health service/sick leave insurance/unemployment insurance/social assistance/housing allowances). | | "Each population is examined as an entity, the empirical findings give no signs of weak popular support for traditional Scandinavian social policy, with the possible exception of the state and municipalities as service providers. The general conclusion at the highest aggregate level is, therefore, that the Scandinavian welfare states continued to enjoy strong support in the early 1990s. However, the data have signs of ambivalence among Scandinavians that should be addressed. Solid support for welfare spending, financing and to some extent the state and municipalities as service providers were combined with relatively weak support for public administration and considerable suspicion of misuse and fraud regarding social programs" (p.244) "Moving to the second purpose, institutional characteristics provide a good guidance for an understanding of attitudes toward social policy in the Scandinavian countries. There is reason to believe that Esping-Andersen (1990) is right when he argues that the welfare states in the Social Democratic regime not only enjoys solid support among workers but also among the middle class. Furthermore, Esping-Andersen's regime theory seems to contain some truths concerning sector cleavages in countries belonging to the Social Democratic regime. The data also suggest that support for specific social programs follows a pattern in the Scandinavian countries.`' (p.245) |
| Bean & Papadakis (1998) | Government spending- spending on specific welfare programmes- More or less government spending on health, education, old age pensions and unemployment benefits. Support for government intervention- Should it be the government's responsibility to provide jobs for everyone who wants one; provide health care for the sick; provide a decent standard of living for the old; provide a decent standard of living for the unemployed | | "Our paper presents evidence from a period when there was great concern about the retrenchment of the welfare state, on the relationships between: the character of institutional regimes of social policy and the level of support for the welfare state, and attitudes to welfare and political and social cleavages" (p. 213) |
| Pettersen, (1995) | Government spending- support for expansion or reduction of social services and benefits (from British national election study and cultural change study in the Netherlands categories: expansion, as now, reduction, don't know); attitudes to social security, social reforms and old age pensions in the Nordic countries (from national election studies, different questions translated into categories expansion, no opinion, no expansion and don't know for Denmark and Sweden and Expansion, as now, reduction and don't know for Finland and Norway); support for increased spending on old age pensions, health services and unemployment benefits (reported % support for each of the policy areas for both 1985 and 1990 version of ISSP, categories: more, as now, less); Regression model 1 run separately for each country using data from national surveys: in Norway and Sweden dependent variable: support for expanding old age pensions (based on the variables mentioned above) in Denmark and Great Britain dependent variable: support for increased social benefits in the Netherlands dependent variable: support for an increase in old age pensions | | Whether people prefer to see state pension schemes, public health services, and unemployment benefits expand, continue as they are or reduced. Is spending to be increased or are services, pensions and benefits considered adequate? Who opposes or supports welfare state expansion. |
| **Government responsibility** | | |  |
| Jaeger (2007b) | | Government responsibility for the old and the sick- on the whole, do you think it should be or should not be the government's responsibility to.. 1 provide a decent standard of living for the old, 2 provide healthcare for the sick | "The objective of this chapter is to address the role of cross-cultural heterogeneity with respect to support for the deserving needy. More specifically, the research question to be examined is how robust the empirical finding of cross-nationally similar levels of support for government responsibility for two social groups of deserving needy, the old and the sick, is, considering citizens' potentially heterogeneous perceptions of the 'deservingness' of these groups" (p.74) |
| Luo (1998) | | Government responsibility - Redistribution- Government's role in solving unemployment (measured by the question the government should provide a job for everyone who wants on; Government should finance projects to create more jobs; Government should provide a decent standard of living for the unemployed); Government's responsibility in reducing income inequality (It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes; On the whole, do you think it should be or should not be the government's responsibility to reduce income differences between the rich and poor); perceptions of intergenerational mobility (a person whose parents are rich has a better chance of earning a lot of money than a person whose parents are poor; in respondent's country, what you achieve in life depends largely on your family background; a person whose father is a professional person has a better chance of getting ahead in life than a person whose father is a factory worker) | "This study proposes a path model to examine the formation of public attitudes towards government's role in solving unemployment, comparing Great Britain and the United States" (abstract) |
| Kalenthaler & Ceccoli (2008) | | Government responsibility - the government should take more responsibility to ensure that everyone is provided for to people should take more responsibility for themselves | "This study seeks to explain individual level variation in support for state responsibility for public welfare by comprehensively testing a range of individual level hypotheses" (p.1042). |
| Forma& Kangas (1999) | | Government responsibility for pensions - What do you think of these government policies for providing income for retired people: a) no government old age pensions, people save for themselves, b) a government old age pension paid from taxes given only to poor people, c) a government old age pension paid from taxes given to everyone over 65 | "The aim of this chapter was to analyse old issues of the support base of different social policy models by utilising a new kind of comparative data on public opinion toward the welfare state in Australia, Finland and Poland" (p.181) |
| Peillon (1996) | | Government responsibility- On the whole, do you think it should be or should not be government's responsibility to: provide health care for the sick; provide a decent standard of living for the unemployed; provide decent housing for those who can't afford it? | "Investigate the factors associated with the legitimacy of selected social programmes in five different countries (Germany, Great Britain, Ireland, Italy, Norway)" (abstract) |
| Andersson (2010) | | Government responsibility- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor?; provide decent housing for those who can’t afford it? | "The aim of this paper was to explore and assess the common propositions regarding welfare regime type and welfare attitudes set out in literature" (p.12). |
| Taylor-Gooby (1998) | | Government responsibility- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor? | "This chapter looks at developments in public attitudes towards the welfare state in four countries (Britain, Germany, Italy and Sweden) and considers how governments might deal with the challenges they face. It asks whether public attitudes may press European welfare states to converge on lower levels of state provision, targeting only certain closely-defined 'needy' groups, or whether welfare systems in different countries ws will instead begin to diverge, each nation adopting its own distinctive solutions" (p.57-58) |
| Koster (2009) | | Government responsibility- should individuals take more responsibility for providing for themselves or should the state take more responsibility to ensure that everyone is provided for; redistribution- should incomes be made more equal or do we need larger income differences as incentives for individual effort | "Examining the relationship between the welfare state attitudes of citizens and the economic dimension of European integration" (abstract) |
| Kumlin (2007) | | Government responsibility- State intervention (two indices: the government should take measures to reduce differences in income levels and employees need strong trade unions to protect their working conditions and wages 2nd:important that government ensures safety against all threats, that the state is strong so it can defend its citizen, important that every person in the world is treated equally, and that everyone should have equal opportunity in life; Voting; political trust; Evaluation of Welfare State related outcomes (the state of health services in [country] and the state of the education in [country] - placed from 0 extremely bad to 1- extremely good | "First, what are the effects of dissatisfaction with welfare state policy outputs on political orientations and behavior? More specifically, I investigate how dissatisfaction affects three types of dependent variables: (1) general ideological variables related to the left-right conflict, (2) support for the incumbent government as expressed through voting, and (3) general trust in politicians and political institutions. A second aim is to analyse how such effects vary across institutional contexts. |
| Gelissen (2000) | | Government responsibility- Support for extensiveness of social policy (index based on social security is a major achievement of modern society. The government should make sure that nobody is left deprived when unemployed, poor, ill or disabled/the government must continue to provide everyone with a broad range of social security benefits even if this means increasing taxes or contributions/some people cannot earn enough income to live on, because of disability, old age etc. to what extent do you agree or disagree that the right to claim assistance from the authorities should be guaranteed; support for intensiveness of social policy (index based on social security is too costly for society. Benefits should be reduced and contributions should be lowered/the government should provide everyone with only a limited number of essential benefits (such as health care and minimum income) and encourage people to provide for themselves in other respects/the government should provide everyone only with essential services such as care for serious diseases, and encourage people to provide for themselves in other respects. | "We investigate how, and to what extent, both kinds of support for the welfare state are related to position in the stratification structure, demographic characteristics, and social-political beliefs, as well as to features of European welfare state regimes". (abstract) |
| Svallfors (2003) | | Government responsibility- Support for government intervention index- On the whole, do you think it should or should not be the government’s responsibility to: provide a job for everyone who wants one?; keep prices under control; provide health care for the sick?; provide a decent standard of living for the old?; provide a decent standard of living for the unemployed?; reduce income differences between the rich and the poor?; give financial help to university students from low-income families; provide decent housing for those who can’t afford it? | "To what extent the different institutional configurations which have been explored in previous chapters correspond to patterns of public support for welfare state intervention" (p.171) |
| Tworzecki (2000) | | Government responsibility- Welfare support index based on: It should be government's responsibility to provide a job for everyone who wants one; unprofitable factories and mines should be closed, even if this leads to unemployment; Guarantee that less economic burden is put on the shoulder during the transformation of our economy; increase pensions and social benefits | "This article looks at the question of just how widespread support for such policies was among Hungarian and Polish Survey respondents at the time of the left's electoral successes" (p.18) |
| Breznau 2010 | | Government responsibility- What part should the government play in running companies in these industries…hospitals/doctors and dentists/schools/universities/day-care centres for children/old age homes; Should the government regulate prices or should they be set by the free market…electricity/basic foods/rents for houses and flats/doctor's fee and hospital charges; To keep prices low, should the government subsidize the production of…electricity/basic foods/construction of houses and flats/doctors and hospitals | Hypotheses: "If the public are purely self-interested, those who have greater access to resources and more education should be less supportive of welfare policies. This is because they stand to lose the most from redistribution of their wealth or interference in their earning potentials. If public opinions are a product of institutional context then preferences for welfare policies should follow the norms and values instilled by policy regimes..if the public are instead ideologically motivated, and for example, they are more egalitarian; then they should support social welfare policies" (p.459) Thus self-interest hypothesis is that those who have more to gain will be more supportive; institutionalist hypothesis those from former communist nations more supportive; egalitarian hypothesis that those with greater economic egalitarian values more supportive |
| Goerres & Tepe (2010) | | Government responsibility-On the whole, do you think it should or should not be the government's responsibility to provide childcare for everyone who wants it? Definitely should be to definitely should not be | "Explore the micro-foundation of welfare preferences, arguing that, depending on the societal context, age-based self-interest is restricted and complemented by intergenerational solidarity" (p.819). Ask: "Does the experience of intergenerational solidarity within the family matter for older people's attitudes towards public childcare?" (p.819). |
| **Inequality** | |  |  |
| Laczko (2005) | | Inequality index -a summary measure related to concerns about social inequality and support for state intervention to reduce it- perceived inequality, agree with the statement that income inequalities are too large, types of state intervention; government has a responsibility to reduce inequality, that the government should find a job for everyone who wants one, and that the government should provide a guaranteed income for all | This chapter will explore the connection between minority nationalism and welfare state attitudes in Canada and in Great Britain, focusing specifically on differences between Québec and the rest of Canada and Scotland and the rest of Great Britain. |
| Aalberg (2003) | | Inequality- IDEAL OF EQUALITY INDEX based on two questions 1) imagine two secretaries of the same age doing practically the same job. One finds out that the other earns considerably more than she does. The better-paid secretary, however, is quicker, more efficient and more reliable at her job. In your opinion is it fair or not fair that one secretary is paid more than the other 2) incomes should be made more equal versus we need larger income differences as incentives for individual effort. **Egalitarian policy** support based on questions 1) there is a lot of discussion about how business and industry should be managed. Which of these four statements comes closest to your opinion? i) the owners should run their business of appointing the managers, ii)the owners and employees should participate in the selection of managers iii)the government should be the over and appoint the manager iv) the employees should own the business and should elect the managers 2) private ownership of business and industry should be increased vs government ownership of business and industry should be increased 3) the government should take more responsibility to ensure that everyone is provided for vs people should take more responsibility for themselves. ISSP ideal of equality based on 3 variables- what do you think that people in these jobs ought to be paid- how much do you think they should earn each year before taxes, regardless of how much they actually get? i) first how much do you think a skilled worker in a factory should earn? ii) how much do you think a doctor in a general practice ought to earn each year? and iii)how much do you think a chairman of a large national company ought to earn each year? | Aim to rank countries according to their support for egalitarian ideals and policies over time. "Want to i) see if there is more than one dimension to the value of equality and ii) investigate two competing hypotheses on the relationship between real economic development and the public's preferences for equality" (p.121). Hypotheses 1 claims that citizens will get used to the increased levels of inequality within osicety and weaken their preferences for economic equality 2 states that the public will react against the increased inequalities within society and strengthen their preferences for economic inequality |
| Sachweh & Olafsdottir (2010) | | Inequality- Perceptions of a country's stratification order 'perceived stratification reality'/ preferences for a stratification order 'stratification aspirations' for both the alternatives were: i) a society with a small elite at the top, very few people in the middle and the great mass of people at the bottom ii)a pyramid with a small elite at the top, more people in the middle, and most the bottom, iii) a pyramid except that just a few people are at the very bottom, iv) most people located in the middle and v)many people near the top, and only a few near the bottom | "In this article, we evaluate how citizens assess the structure of social inequality and what shape of stratification they would prefer" (p. 149) |
| Taylor-Gooby (2008) | | Inequality- Redistribution- level of agreement with 3 variables government should reduce inequalities, progressive tax and income differences are necessary; perceived reality and aspiration of 5 types of images of inequality across countries; perceived and ideal pay for unskilled worker, factory owner, shop assistant, lawyer; support for market provision- shown as should higher incomes buy better services in education and health care (measured as whether it is just or unjust that people with higher income can buy better health care/education than people with lower incomes); support for a redistributive state by older people ( 54+), working women, working in sheltered sector, working in private sector, endorsement of market inequalities by older people ( 54+), working women, working in sheltered sector, working in private sector | How the shift to the Silver age of welfare, often distinguished with market values such as inequality, incentives, competition and indifference to social justice, affect welfare values, concerned with fairness, redistribution and greater equality, and how well regime types applies to values etc of citizens |
| Kalenthaler, Ceccoli, & Gelleny (2008) | | Inequality/redistribution- in order to be considered just, what should a society provide?: eliminating big inequalities in income between citizens | "In this paper we seek to understand why attitudes vary among individuals regarding the issue of income distribution in European Union member states" (p. 218) |
| **Redistribution** | |  |  |
| Svallfors (2006) | | Redistribution - differences in income in [country] are too large and it is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes; Conflict index (inequality continues to exist because it benefits the rick and powerful; no one would study for years to become a lawyer or doctor unless they expected to earn a lot more than ordinary workers; inequality continues to exist because ordinary people don't join together to get rid of it); Incentive index (People would not want to take extra responsibility at work unless they were paid for it; workers would not bother to get skills and qualifications unless they were paid extra for having them); Welfare purchase (is it just or unjust- right or wrong- that people with higher incomes can: buy better health care than people with lower incomes? and buy better education for their children than people with lower incomes?) Government Intervention index (should it be the government's responsibility to: provide a job for everyone who wants one?; keep prices under control? provide health care for the sick? provide a decent standard of living for the old? Provide a decent standard of living for the unemployed? reduce the income differences between the rich and the poor? give financial help to university students from low-income families? provide decent housing for those who can't afford it?; Welfare spending index (Listed below are various areas of government spending. Please show whether you would like to see more or less government spending in each area. Remember that if you say 'much more', it might require a tax increase to pay for it. Health/Old age pensions/ unemployment benefits. 3 indices based on Swedish data: Spending; Financing and Service - measuring support for higher public spending, support for collective financing of welfare policies and support for the public organisation of welfare policies (p.87) | "This is a book about classes. Its main focus is not how different classes live but on how classes differ in how they look at society." (p.1). Chapter 4 "Any attempt to understand class differences in attitudes must include the relationship of class to the market" (p.56) "The first issue we will be examining is how wide a pay or income disparity is considered reasonable in all four countries. To do this, we will be constructing indexes of legitimate income differentials on the basis of responses to questions concerning what specific occupation should earn, which we will then compare by country and class over time. The second area of inquiry concerns attitudes toward income distribution. To what extent do people consider income differentials excessive and redistribution necessary? Are there any national and class differences in this regard, and do these opinions change over time? The third issue concerns the perceived causes of inequality. is it primarily the outcome of distributive conflicts or of the need to create incentives for personal development and hard work? And to what extent are these explanations mutually exclusive: can who ever sees inequality as the results of distributional conflict also consider it motivating? Fourth, we will be examining one or two points relating to people's views on the ideal compass of the market" (pp 56-57). Chapter 5 Analyses the relationship between class and attitudes to welfare policies |
| Kumlin & Svallfors (2007) | | Redistribution - index of the government should take measures to reduce differences in income levels and employees need strong trade unions to protect their working conditions and wages | "Why do find small class differences in attitudes towards redistribution in some countries and large in other countries?" (p. 19) |
| Coreneo (2000) | | Redistribution - It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes | The current paper aims at exploring the distinctive forces that drive citizens' preferences for political redistribution in the U.S. and Germany, distinguishing within the latter between West Germany and East Germany' (p.1); Test whether 'homo economicus', 'public values' or social rivalry' best explain these preferences |
| Sabbagh & Vanhuysse (2006) | | Redistribution (in a fair economic system, people with more ability would earn higher income/taxing those with high incomes to help the poor only punishes those who have worked the hardest/in this society I would prefer to see more freedom/The private enterprise system is generally a fair system for working people/The government should work to reduce the income gap between the poor and the rich/there should be a law limiting the amount of money an individual is allowed to earn in a year; Internal attribution (thinking of persons who are unsuccessful in supporting themselves financially, how important would you say each of the following causes in holding them back? Failed to take advantage of educational and training opportunities available to them/laziness, little or no ambition/lack of native intelligence, ability and talent/lack of character and will power); Broad scope of welfare (below is a list of things people typically need at different stages of their life. For each item indicate whether our government should provide it to all as a basic citizen benefit, or individual citizens should be responsible for providing it for themselves (adequate health and medical care/an adequate retirement income in old age/financial assistance during periods of unemployment/financial assistance to poor families/financial assistance to people with a disability); External attribution of inequality (thinking of persons who are unsuccessful in supporting themselves financially, how important would you say each of the following causes in holding them back? prejudice and discrimination against persons because of their race, age or religion/limited opportunities given by society/failure of society to provide good schools for many citizens/being taken advantage of by persons who are better off than themselves) | "We explore the dimensionality of attitudes towards the welfare state among university students in eight countries representing four worlds of welfare: liberal, radical, conservative and social democratic" (abstract) |
| Svallfors (1997) | | Redistribution index to measure redistribution based on 3 questions: It is the government’s responsibility to reduce differences between people with high incomes and those with low incomes; The government should provide a job for everyone who wants one; The government should provide everyone with a basic income | “This paper attempts to link these two research fields in an analysis of how attitudes to redistribution are structured in various welfare state regimes” (p. 284). “Attitudes among the populations of these countries are analysed to detect a) the overall support for state intervention and redistribution in the various countries; b) the range of income differences that are considered legitimate in various countries, and c) what social cleavages are dominant in structuring attitudes” (p.284) |
| Verneby & Finseraas, 2010 | | Redistribution is an IV- egalitarianism as an additive index with the following components; incomes should be made more equal, the government should take more responsibility to ensure that everyone is provided for and competition is harmful it brings out the worst in people | Assess impact of the anti-solidarity (if citizens are xenophobic their support for the welfare state will diminish) means that xenophobia affects egalitarianism which then impacts left voting and policy-bundling effects which would mean that xenophobia has a direct effect on left vote (the right is more conservative on issues of multiculturalism thus voters who on economic issues would have voted left are willing to trade off redistribution views against their negative views of immigrants). Dependent variable is left vote where 1 = respondent would vote for a left party as his or her first choice |
| Crutchfield & Pettinicchio, 2009 | | Redistribution- call it inequality index should incomes be made more equal, should income differences sere as incentives; attitudes about the government's responsibility to ensure that everyone is provided for | Exploring cultures of inequality and comparing countries that are more or less homogenous and the impact on desire to invest in social welfare |
| Edlund (1999) | | Redistribution- Do you think it should or should not be the government's responsibility to reduce income differences between the rich and the poor? Definitely should be to definitely should not be//added to an index with do you think it should or should not be the government's responsibility to provide a job for everyone that wants one? definitely should be to definitely should not be | "This article analyses attitudes to redistribution and financial cheating in Norway and the USA" (abstract) |
| Edlund (2003) | | Redistribution- Government should provide jobs; Government should reduce income differences; government should increase taxes on high incomes; Government reduce differences rich/poor. Have 4 models 1) assuming that neither your own class nor that of your spouse is associated with class identity 2) class identity is related to your own class situation 3) class identity related to your spouse's class identity 4) class identity related to both your own and that of your spouse | "The purpose is to analyse the extent to which these institutional differences have left their imprint on the ways men and women in conjugal families define their identities and political attitudes in class terms. Attitudes are examined across three relevant areas: class identity, political party preferences and attitudes towards state redistribution" (p. 196) |
| Mau in Glatzer (2002)chapter 15 | | Redistribution- Government should reduce income differences, 1 definitely, 2 probably, 3 probably not, 4 definitely not dependent variable in table 3 | "This paper will concentrate on the way the public perceives and frames the principle of redistribution in Britain and Germany." (p.218) |
| Matheson & Wearing (1999) | | Redistribution- Government should reduce income differences, income differences are necessary for prosperity, government should provide jobs for all, government should provide a basic income, taxes on high incomes are too low | "The claim is made from time to time that as industrial society gives way to post-industrial society, one consequence is going to be a fundamental reorientation of how people conceive of social differentiation and inequality, both in theory and in practice. In particular, a variety of theories of the post-industrial contend over the respective significance to be attached to paid work and state processes in understanding both who gets what and does what in life, and how people think, talk and write about such things" (p. 135) "The main purpose of our comparative argument is to see how far conclusions drawn from country-specific evidence can be generalised beyond the specificity of national settings and located in the decommodofying processes of regime types. What then is the empirical relationship between labour force status and political attitudes?" (p.137) |
| Kenworthy & McCall (2007) | | Redistribution- how much do you agree or disagree with the statement: it is the responsibility of the government to reduce the differences between people with high incomes and those with low incomes? From strongly disagree to strongly agree | "What happens when market inequality is high or increases. Does government compensate with high redistribution in order to secure a relatively egalitarian distribution of posttax-posttransfer income?." (p.35) “Study demand for redistribution to explore these mechanisms are "more market inequality thus leads to political demand for more generous redistributive policy" (ibid) |
| Edlund (1999) | | Redistribution- income differences too large; government reduce income differences; taxes on high incomes too low; taxes on middle incomes too low; taxes on low incomes too low; high incomes should pay a larger share in taxes | "The first objective of this chapter is to examine to what extent redistributive tax policies receive public support in Sweden, Great Britain and the United States" (p.107) "These suggestions lead us into the second objective of this chapter. Acknowledging that the countries under study differ in important respects regarding their institutional characteristics, and that these distinctive ways of organising state activities are supposed significantly to affect popular beliefs concerning the role of the state in society, it is expected that attitudes to income redistribution and taxation will vary both cross-nationally and between different strata within each nation" (p.108) |
| Corneo (2000) | | Redistribution- It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes | “The current paper aims at exploring the distinctive forces that drive citizens' preferences for political redistribution in the U.S. and Germany, distinguishing within the latter between West Germany and East Germany'” (p.1); Test whether 'homo economicus', 'public values' or social rivalry' best explain these preferences |
| Cusack et al. (2006) | | Redistribution- it is the responsibility of the government to reduce the differences in income between people with high incomes and those with lower incomes and on the whole, do you think it should be or should not be the government's responsibility to: reduce income differences between the rich and poor? | Provides a systematic account of the interaction between exogenous shocks, popular demand for compensation and government responsiveness to such demand (p.366) |
| Dancygier & Saunders (2006) | | Redistribution- it is the state's job to reduce the income gap between those with high and those with low incomes 1-5 (Germany) income and wealth should be redistributed towards ordinary working people? 1-5 UK | Study immigrant political behaviour in two European countries hosting large migrant populations: Germany and GB. Ask whether immigrants have the same distribution of preferences on key issues such as the welfare state (spending and redistribution) as comparably situated natives and secondly exploring determinants of immigrant partisan identification in GB. |
| Linos & West (2003) | | Redistribution- Levels of agreement with the following three statements: 1) it is the responsibility of the government to reduce the differences between people with high incomes and those with low incomes 2)the government should provide a job for everyone who want one, and 3)the government should provide everyone with a basic income- all measure from 1 strong agreement to strong disagreement 5 | "How do different people in different countries want welfare states to function? Do public opinion data match our theories of welfare state, and can such data help us develop our thinking?" (p.393) "In this paper, we critique and extend Svallfors' analysis, arguing that his overall conclusion of similarity in the structure of public opinion across welfare state regimes rests upon a problematic treatment of missing data and a poor operationalization of the theoretical determinants of public opinion" (p. 394) |
| Crepaz (2008) | | Redistribution- Operationalizes what he calls 'support for the welfare state' People/government should take more responsibility/society should eliminate inequalities/government should ensure that everyone is provided for/ society provide basic needs for all | "The purpose of this book is to examine the validity of this extrapolation from the American to the European context and to probe whether such an 'Americanisation of the European welfare state' is indeed occurring as a result of immigration-induced diversity" (p.3) |
| Rehm (2007) | | Redistribution- Please say to what extent you agree or disagree with the following statement: The government should take measures to reduce differences in income levels. Five answer categories: agree strongly, agree, neither agree or disagree, disagree and disagree strongly | What determines individual level support for income redistribution by the government? |
| Crepaz chapter 3 in Kymlicka & Banting, (2006) | | Redistribution- Scale from 1 to 10 where 1 is people should take more responsibility to provide for themselves and 10 the government should take more responsibility to ensure that everybody is provided for | "How widespread is public support for multiculturalism policies? And what is the impact of the adoption of MCPs on public support for the welfare state?" (abstract) |
| Mau & Burkhardt, (2009) | | Redistribution- scale from 1 to 5 on agreement with question 'the government should take measures to reduce differences in income levels' | How do migration and ethnic heterogeneity affect welfare state solidarity |
| Senik et al., (2008) | | Redistribution- scale from 1 to 5 on agreement with question 'the government should take measures to reduce differences in income levels' | "We want to find out (1) how the perceived presence of immigrants is related to natives 'support for the welfare state, and how this relationship varies (2) with natives' attitudes toward immigrants, and (3) across countries" (p.346) |
| Andreβ & Heien (2001) | | Redistribution- support for government intervention -Constructed by 5 point scale questions on Attitudes to the function of the welfare state measured as opinion of it is the responsibility of the government to reduce the differences in income between people with high incomes and those with lower incomes, the government should provide a job for everyone who wants one, the government should provide everyone with a guaranteed basic income | is it possible to find 4 worlds of welfare attitudes? If there exist patterns do they correspond to Esping-Andersen’s typology? |
| Jaeger (2006) | | Redistribution- the government should take measures to reduce differences in income levels from agree strongly to disagree strongly | The article explores whether or not "welfare institutions, policies and legacies are not systematically related to levels of support for redistribution in the Western, industrialised world?" (p.158). The emphasis is put on explaining why there has been a disagreement amongst scholars as to whether or not this is true. |
| Jaeger (2007) | | Redistribution- the government should take measures to reduce differences in income levels from agree strongly to disagree strongly | "Are subjective measures such as left-right position really causally related to welfare attitudes? This problem of causal inference has gone largely unnoticed in the literature but is of fundamental importance to the growing body of studies treating different types of subjective measures as causal determinants of welfare support. In this paper I address the theoretical, interpretational, and empirical problems that arise when treating subjective measures as causal predictors of welfare support and propose a new analytical approach" (p.4) |
| Rehm (2009) | | Redistribution- the government should take measures to reduce differences in income levels from agree strongly to disagree strongly | "This article aims at making three contributions. First, it draws attention to the necessity of testing the assumed micro assumptions of our macro theories…Second, the article argues that many of the existing theories about the formation of redistributional preferences rely on a logic of preference formation that is not entirely convincing. Almost all political economy contributions conjecture that developments within and individual's industry are shaping her or her redistributional demand. In what may seem to be a small contrast-but it is argued to make important differences-this article proposes that an individual's occupation, especially risk exposure related to someone's occupation, shapes redistributional preferences. Third, this article subjects some competing arguments within the political economy literature on the determinants of redistributional demand to empirical tests and thereby combines the all to often disjoint literatures of comparative political economy and political behaviour" (p.856) |
| Finseraas (2008) | | Redistribution- the government should take measures to reduce differences in income levels from agree strongly to disagree strongly | Explore relationship between perceptions of immigrants and redistribution support |
| Finseraas (2009) | | Redistribution-the government should take measures to reduce differences in income levels from agree strongly to disagree strongly | "This article returns to preferences and explores how people's preferences for redistribution-the demand for redistribution-is related to inequality" (p.95) |

**Appendix 5 – Author &Year, findings**

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| --- | --- | --- | --- |
| **Author & Year** | **Finding** | | |
| **Concern** |  | | |
| Van Oorschot & Uunk, 2007 (bookchr) | Positive effect of immigration on concern for immigrants show socialising effect, higher concern for immigrants in higher spending countries, individual level characteristics confirm self-interest theories and cultural theory is confirmed as ideology and values (ethnic intolerance) impact as expected. "More welfare spending is associated with a greater share of immigrants, and more immigration makes people more solidaristic with immigrants compared to the elderly" (p.234) | | |
| Van Oorschot, Arts & loek (2005) | "At country level we found strikingly little variation in average levels of informal solidarity between countries. The rank ordering of informal solidarities towards unabled and unemployed people and immigrants was the same in all countries, reflecting commonly applied deservingness criteria of control, reciprocity and identity. And there was little variation in absolute levels. The grouping together of countries in regime types did not explain this variation satisfactorily."(pp 48-49). "However, welfare state effort, in terms of social expenditure as a percentage of GDP, showed a negative correlation with informal solidarity regarding the unabled and the unemployed, which fits the substitution hypothesis. Also a variation in social capital between countries was better explained by welfare state effort than by welfare state type. There is a high positive correlation between a country's level of expenditure on social protection and the amount of social capital, which fits the reinforcement hypothesis." (p.49)"Our findings seem to suggest that welfare state development, upwards and downwards, involves a trade-off between solidaristic feelings among the population on the one hand and voluntary activity and social trust on the other. Our findings refute the claim by welfare pessimists about the negative effect of welfare on both informal solidarity and on social capital, and the optimists' claim about positive effects on both matters. It seems to be a matter of 'either/or', of having one or the other. The fact that informal solidarity and social capital are not statistically correlated when holding constant for welfare state efforts supports our trade-off interpretation. What were the results of the individual level analyses? The individual characteristics that have a positive influence on informal solidarity with needy groups are people's social capital, being a woman, being older, and being more leftist and attending church more frequently. We also found that informal solidarity depends on the type of national society people live in. A country-level variable that increases people's informal solidarity with all groups of needy people is the average level of education. All other country variables differ in their influence on the solidarity towards the three needy groups, either by the degree of their influence, or their direction. However, specific patterns of relations suggest evidence for a substitution effect, whereby formal, state-organised solidarity crowds out informal solidarity. We found, for instance, that informal solidarity tends to be weaker among people who live in countries that spend more on social protection. We also found evidence for a 'national burden' effect. Feelings of informal solidarity towards specific groups of needy people are weaker where the groups concerned are relatively larger. Perhaps the most intriguing finding pertains to the relations between welfare state effort, social capital and informal solidarity. At the country level there appeared to be no significant correlation between social capital and informal solidarity controlled for welfare effort. At the individual level, again controlled for welfare effort, we found, however, that individual people with more social capital feel more informal solidarity towards all needy groups, while informal solidarity towards unabled and unemployed people tends to be lower on average among all people living in countries with higher aggregate levels of social capital. One could argue that this finding is an indication of the Janus-faced character of social capital. At the individual level people with a high amount of social capital, who cherish norms of generalised reciprocity and social responsibility, are also high on informal solidarity. People living in a country with a high level of aggregate social capital can, however, rely on the reassuring realisation that there are others who will be concerned with needy groups. Therefore, a substitution effect is discernible in the guise of an 'after you' attitude."(pp. 49-50). | | |
| Van Oorschot & Uunk, 2007 | Positive effect of immigration on concern for immigrants show socialising effect, higher concern for immigrants in higher spending countries, individual level characteristics confirm self-interest theories and cultural theory is confirmed as ideology and values (ethnic intolerance) impact as expected | | |
| Van Oorschot (2008) | Deservingness school of thought, little relation between w.s characteristics and solidarity, higher solidarity in more diverse societies, lower solidarity in countries with more negative opinion towards immigrants and poorer countries- socialisation and cultural theory but also scarcity theory confirmed. Pearson's r Eth frac 0.0221; ling frac 0.531\*; rel frac 0.034 ; immigration as no of non-national immigrants per 1000 inhabitants 0.275; no of foreign-born citizens as % of all citizens in a country 0.521\* | | |
| Van Oorschot (2006) | "Based on data from the 1999/2000 European Values Study survey we found as a common pattern for all 23 European countries involved that informal solidarity is highest towards elderly people, closely followed by sick and disabled people, next there is the solidarity towards unemployed people, and solidarity towards immigrants is lowest. This pattern is exactly what was expected from earlier empirical studies on popular support for types of welfare schemes, on popular images of target groups, and on popular deservingness criteria. Between countries we found some variation in the relative positions of the groups of needy people. We speculated that in countries where national resources for social protection are low, as is the case in the Central and Eastern European countries, people tend to differentiate more strongly along the deservingness criterion of identity in terms of ‘us’ versus ‘them’ (in order to preserve the little there is for ‘ourselves’), while in a context of affluence, such as in the Netherlands and in the Scandinavian countries, people tend to differentiate more along lines of incapacity, that is, the deservingness criterion of control. The fact that the solidarity rank order is basically the same for all European countries indicates that the underlying logic of deservingness has deep roots in popular welfare culture. This was supported by our finding that the deservingness rank order is the same among men and women, among different categories of age, educational level and income, among people with different social positions, and among people from different religious denominations. Clearly, regarding the rank ordering, the results of our study confirm those of other studies. However, our study is among the very first to pay explicit attention to the conditionality of solidarity, that is, the degree to which people make a distinction in other solidarity towards different groups of needy people. We explored conditionality and its covariates at the aggregate and at the individual level. At the aggregate level there is variation in national levels of conditionality, which is associated bi-variately with various factors. Average conditionality is higher, for instance, in the poorer countries of Europe (reflecting perhaps a ‘national burden’ effect); in countries with lower unemployment (possibly reflecting a more negative image of unemployed people); where people put less trust in. other people, and in (welfare) state institutions (perhaps reflecting worries about overuse and overexpenditure); and where immigrants are looked upon more negatively. The two important welfare state characteristics of regime type and degree of social spending are not significantly related to national levels of conditionality. However, the number of 23 countries is too small to carry out any deeper multi-variate analyses at the aggregate level. At the individual level, where we analysed the factors which influence why some people are more conditional in their solidarity towards needy groups than others, we found that the directions and sizes of the effects do not essentially differ between countries and regions of Europe. In other words, the pattern of explanatory personal variables is to a large extent equal all over Europe. This is another indication that popular deservingness thinking has deep roots. For socio-demographic and socioeconomic variables we found that conditionality is a bit higher among women, higher among older people, and among people with lesser education. There is no difference between employed or unemployed people, or between people with higher or lower income. Except for gender, these results are the same as those of an earlier study on conditionality with Dutch opinion data. Regarding ideological characteristics, it showed that, as in the Dutch study, right-wing people are more conditional, while people’s work ethic makes no difference. Additionally, it was found that people who are more in favour of social equality are less conditional, regardless of whether they are more left-wing or right-wing. Regarding attitudinal characteristics, it showed that people with more negative attitudes towards state welfare, welfare dependency and welfare dependants are more conditional. The same is found for people with less trust in others, in (welfare) state institutions, and in democracy. Particularly strong are the negative effects of attitudes towards immigrants. Finally, as in studies on solidarity and donation behaviour, religion played a role. The issue is not whether people say they are religious or not, or what denomination they belong to, but it is church attendance which makes a difference: people who attend church more frequently are less conditional in their solidarity towards needy groups." (p.37) "People living in the Southern, Central and Eastern European welfare states tend to be less conditional, which is further supported by these countries’ lower social spending, but which is counteracted by the fact that these countries are less wealthy than their Western and Northern counterparts, and that the proportion of Protestants among their populations is (very) low. In addition, people living in countries with higher unemployment tend to be less conditional."(P.38) | | |
| Van Oorschot (2008) (bookchr) | "..we found a common pattern for all 23 European countries involved that informal solidarity with elderly people is highest, closely followed by sick and disabled people; next is solidarity with unemployed people, and solidarity with immigrants is lowest. ..That the solidarity rank order is basically the same for all European countries indicates that the underlying logic of deservingness has deep roots in popular welfare culture. This was supported by our finding that the deservingness rank order is the same among men and women, among different categories of age, educational level, and income, among people with different social positions, and among people from different religious denominations. "(p.283). "Our study is among the first, however, in which explicit attention was paid to the conditionality of solidarity, that is, the degree to which people differentiate in their solidarity with different groups of needy people. We explored conditionality and its determinants at the individual level. We found that the directions and sizes of the determining effects do not essentially differ between regions in Europe; the pattern of explanatory personal variables is to a large extent equal all over Europe. This is another indication that popular deservingness thinking has deep roots. We found that conditionality is slightly higher among women, among older people, and among people with less education. No difference exists between people with higher or lower income." (p.283) "Regarding ideological characteristics it was found that, as in the Dutch study, rightist people are more conditional, while people's work ethic makes no difference. Additionally, it was found that people who are more in favour of social equality are less conditional, regardless of whether they are more leftist or rightist. Regarding attitudinal characteristics, it was found that people with more negative attitudes towards state welfare, welfare dependency and welfare dependants are more conditional. The same was found for people with less trust in others, in (welfare) state institutions, and in democracy. Particularly strong were the negative effects of attitudes towards immigrants. Finally, as in studies on giving to charity, religion played a role. Whether people claim to be religious or not, or what denomination they belong to, is irrelevant; it is church attendance that makes a difference: people who attend church more frequently are less conditional in their solidarity with needy groups." (p.283-284) | | |
| **Areas** |  | | |
| Berg (2007) | "Neither the existence of multi-level territorial attachments, nor their impact on political trust, seems to challenge either state legitimacy or the whole multi-level system as such; however, the relationship with solidarity can be argued to be stronger and more exclusive." (p.136) "It is supra-national attachment that supports the preference for the decision level for welfare issues, and that fosters extended solidarity that includes other EU citizens; national attachment, in contrast, has a negative impact."(p.137-8). "people with a multiple form of attachment prefer the national level as the decision level. In other words, people who possess a nested form of attachment trust political institutions at all territorial levels, but that does not mean that they prefer welfare issues to be determined at the EU level"(p.138). "In all the EU countries the pattern is for mixed and very strong attachment strengths to have significantly negative effects on the preference for the EU as the decision level for welfare issues, lending further support to the idea that 'thickness' corresponds to attachment strength."(p.138). "the Eurobarometer data indicate the anticipated pattern: people with strongest domestic attachment are unsupportive, whereas people who include the supra-national level among their strongest attachments are more supportive" (p.139). | | |
| Burgoon (2009) | Citizens appear to treat the national and EU levels as imperfect substitutes, but with diverging implications for how existing welfare-related provisions at one level affect support for provisions at the other. On the one hand, the evidence suggests that more generous national welfare provision tends to diminish individual support for EU-level assistance and tends also to dampen how much individual job insecurity spurs such support...On the other hand, the relatively low level of EU-level transfers appears not to have much constraining influence on support for national welfare' (p. 430). | | |
| Taylor-Gooby & Rose (2010) | "The main findings are that the participants in both countries tend to endorse the theme of equality of opportunity as a major normative goal of welfare states. Does this imply a simple convergence of ideas across regimes in the face of pressures to move away from state and more towards individual responsibility for outcomes, suggesting to some extent an erosion of regime differences in attitudes? In fact, the qualitative analysis of discourse shows that people in the two countries typically set this conception within rather different frameworks of ideas. For those in Germany, equality of opportunity is much more likely to be associated with support for state commitment to provide a common basic standard of services. Many UK participants endorse this idea, but much mroe weakly. There was a strong current in the UK groups that interprets equality of opportunity in terms of the availability of a common baseline of education, training, health and other services, but acknowledges the responsibility of the individual to grasp the opportunities that are available. This emphasis on individual agency, and on desert through proactivity and effort, contrasts with the dominant viewpoint among German participants. In Germany there is also sometimes (and particularly among routine workers) concern that insurance contributions should be taken into account" (p.100) | | |
| Bolzendahl & Olafsdottir (2008) | "Only British citizens are more supportive than Americans" (p.291) in terms of paid maternity leave and their support has increased more rapidly over time than in the other countries furthermore "all nations are less supportive of financial benefits for childcare than the US without controls, but introducing controls removes significant differences between Americans and the British" (p. 292). "Our analysis has shown that gender and work/family attitudes influence family policy support differently in the US than in other liberal welfare states" (p.294). "illustrates that the gender cleavage in US support is not only significantly different from the other liberal states but also substantially larger" (p. 295). "it appears that American support for family policies is largely based on the location of 'female' and not on an ideological commitment to gender equality" (p. 296). "many Americans may simply not see family policy and gender egalitarianism as being connected" (p. 297). | | |
| Saxonberg et al. (2006) | "Post-communist family policies are coming increasingly into contradiction with the needs and aspirations of the population. The Polish and Czech governments have basically followed re-familization strategies because of the anti-feminist communist ideological legacy, which have prevented them from seriously considering de-familization policies that would promote gender equality. Economic pressures have also played a role, as these governments thought that re-familiaztion policies would save them money. In addition, our analysis of gender attitudes indicates that de-familization policies that promote gender equality would be more likely to meet the needs and rising aspirations of post-communist women than today's policies. Such policies could encourage women to have more children, since they would make it easier for them to balance work and family. Today's policies, in contrast, have encouraged women to leave the reproduction market in order to be able to remain in the labor market." (p.308) | | |
| Gevers et al. (2000) | Overwhelming support for public health care services across countries in Europe with little cross-country variation; evidence found for relationship between different types of welfare types and support for public health care- support is particularly linked to social-democratic type of regime and in the Mediterranean welfare states; support for public health care associated with wider coverage and public funding- only in countries with less consolidated national health care services is the preference for public health care higher than in countries where health care is financed by means of social security payments; especially in countries with lack of social care services for the elderly are there high levels of public support with the same effect for those countries with few services for young children; little evidence for self-interest oriented motives when controlling for individual characteristics; some effects were found on the individual level- preference for public health care was stronger for people in the highest income group than those in lower, unemployed appear more in favour than working people, leftist political orientation was associated with higher support and women were more supportive than men | | |
| Pfeifer (2009) | "This article set out to demonstrate that attitudes towards a specific subfield of the welfare state -MIP policies- may follow a logic of their own, diverging from expected regime patterns. Aggregated levels of support were shown to be negatively related to total social expenditure and positively to unemployment levels. A generous welfare state with high expenditure levels provides comprehensive protection and leaves few people in the situation of having to rely on MIP schemes, leading to 'saturation' in the population: There is no strong demand for further state involvement. High unemployment levels in turn, are connected with stronger preferences for state involvement, as the market is seen as unable to provide an income for an increasing share of the population. Regarding the degree of societal polarization and differences between socio-economic groups, it was assumed that the uneven distribution of poverty risks in the population may highlight roles of net payer and net beneficiary MIP schemes. This is in turn facilitates the calculation whether the policies in question serve one's interests. Individual socio-economic position should thus have a measurable impact on the support of state responsibility for policies targeted at the poor. People close to the labour market, i.e. men, well-educated people, high-income earners and upper social classes, should demand less state responsibility for MIP schemes than women, people with primary education, low-income earners, working classes and, strongest of all, the unemployed. Country-wise OLS regressions have confirmed these hypotheses: Some socio-economic traits were important in almost all contexts, e.g. income and being unemployed. The degree to which these individual characteristics mattered, however, differed across countries. Moreover, not only the overall polarization but also pattern of group differences varied. Being unemployed led to significantly stronger preferences for state responsibility compared to the working classes in Germany and Belgium, whereas in The Netherlands the unemployed did not differ significantly from the working classes in their attitudes. Thus, it seems that not only aggregate levels of attitudes but also degrees of polarization and its patterns are influenced by national-specific structures and contexts: Respondents can be assumed to calculate self-interest within these frameworks. High levels of unemployment in welfare states with patchy safety nets may produce rather high degrees of support with little societal polarization" (pp128-129). | | |
| Velladics & Henkens (2006) | " The findings show that, despite their different social, economic and political backgrounds, among the old and the new member states there are commonalities in people’s value orientations and attitudes towards population ageing. Most people are pessimistic about the consequences of population ageing, irrespective of their sex, age, level-of-education and nationality. The most frequently favoured policy responses to population ageing of both Eastern and Western Europeans are to raise taxes and to extend working life. Neither in the old nor in the new member states did people support the option of lowering pension benefits. These results support Kohl’s (2004) findings regarding pension reform preferences in the old EU member states. Despite these similarities, there were marked differences in the reform preferences of Eastern and Western Europeans. Eastern European respondents were much more in favour of a pension structure in which benefits depend on the number of their children. This attitude reflects the greater reliance on children for old-age support in Eastern than Western Europe and a stronger adherence to ‘ traditional values’, as promoted during the communist era and manifested in gender differentials in the retirement age and intergenerational solidarity (Lohkamp-Himmighofen and Dienel 2000; Wolchik 1998). Turning to people’s personal expectations and preferences about their own retirement, it was found that both Eastern and Western Europeans expected to retire at an older age than the current actual retirement age. This may be interpreted as a sign that people are aware of the imminence of pension reforms. The preferred retirement age was lower, however, than the average age of exit from the labour force. This may be an attitudinal legacy: in Eastern Europe people are used to low statutory retirement ages, while Western Europeans have become accustomed to universal and generous early-retirement schemes. Thus, in both the old and new member states, while the respondents expressed some willingness to work longer, they intended to retire earlier than the actual current retirement age. Population ageing in Europe will inevitably put solidarity between the generations to the test. While people’s policy preferences in most countries appear to indicate a willingness to pay higher taxes and retire later (rather than approve a reduction in benefits), few would choose to retire later. In this, the differences between the old and new member states were slight. There was, however, a marked contrast in the expressions of inter-generational solidarity. Whereas Eastern Europeans were much more inclined to expect and support inter-generational solidarity in their own households, Western European solidarity between generations has been formalised and embedded in the social security system." (291-292) | | |
| Lynch & Myrskyla (2009) | "Taken as a whole, the results presented in this article bring into question a key micro-foundational presumption of many current theories of welfare state reform: that receiving social benefits will lead individuals to political attitudes and eventually behaviour in defence of 'their' programs. Even recipients of the most generous welfare state programs appear to be motivated in their policy preferences less by their status as beneficiaries than by pro-welfare values, partisan attachments, or particular features of the domestic political and policy environment. This resonates with the literature suggesting that self-interest does not determine support for most public policies." (p. 1093)"At the individual level, support for a robust and multifunctional welfare state is strongly associated with support for the PAYGO pension model and for prioritizing pension spending over other areas. The effects of the other individual-level factors related to partisanship, political mobilization, or position in the labour market vary substantially in significance, size and sign across countries, issue areas, and over time. The clearest predictor of pension reform attitudes, however, is the country of residence."(p.1094) | | |
| Gelissen (2001) | "The citizens of most European welfare states widely endorse provision of pensions by the state" (p.516). Find partial support for Esping-Andersen's thesis "Citizens of corporatist welfare states showed- compared to citizens of liberal welfare states- more frequent preferences for a shared responsibility for the provision of pensions between employers and employees. However, in the less mature Mediterranean welfare states, the general public expects relatively more from the state, despite- or perhaps because of- the rather limited role of the state in social security in these countries" (p.517). "Moreover, preferences of the citizens of social democratic welfare states were not, as we expected, in comparison to the preferences of the citizens of liberal welfare states, more supportive of pension provision by the state"(ibid). The article also finds that the Netherlands is a mixed case, confirmed by the finding that "the Dutch endorse individual responsibility relatively strongly" (ibid). Also discovered the effects of a combined measurement "consisting of the level of generosity of the pension system, the importance of private pension arrangements in a country and employers' share of contributions to financing social security" (p.518) and also show how one needs to take the maturity of the welfare states into account thus "social democratic welfare states have reached a high level of maturity, and therefore their citizens may endorse support for state pension less strongly" (ibid)..also "citizens of social democratic welfare states are more likely to opt for private pension contracts" (ibid) Lastly "the results pointed to enlightened self-interest-rather than moral considerations- as a more important determinant of opinions concerning responsibility for pensions. People are more likely to opt for either individual or shared collective responsibility for pension provision as the duration of education increases. Furthermore, members of the petty bourgeoisie-as well as those who consider themselves to be middle class and upper-middle class- show a stronger preference for private pension arrangements. On the other hand, old-age pensioners, women and union members more often prefer state pension provision. Furthermore, the above results suggest that both contextual level variables and individual level variables significantly enhance the fit of the models" (ibid) | | |
| Taylor-Gooby (2004) | "The pattern of attitudes to labour market policies, as to most areas of public policy, is complex. Simple hypotheses, derived from the discussion of the development of NSR in welfare states, are either weakly or partially supported. In general it is difficult to identify consistent OSR or NSR constituencies, but patterns of attitudes can only really be interpreted within particular national contexts. Thus, the broad directions of national policy are supported in France and Sweden, while the area of compulsion, which is now beginning to emerge at a time of labour market stress, especially in policies for young unemployed people, provokes considerable conflict. Conversely, in western Germany, OSR policies are beginning to experience substantial pressures, while in the United Kingdom there is an indication of consensus on a more interventionist stance by a government which has hitherto relied on targeted policies within a liberal market framework." (p.61) "In all cases, the underlying structure of attitudes resolves into two factors, one of which accounts for about a third and the other about a fifth of overall variance. One factor concerns state intervention in the interests of vulnerable groups, reducing in come differences, pursuing OSR support policies and also positive activation. The other centres on a more liberal market-oriented approach and includes a distinctive high weighting of negative activation through compulsion in all four countries, and in most cases constraint on spending on the poor. In the case of Germany this is expressed through a negative loading in relation to the interventionism factor, rather than a simple positive loading on the liberal factor, and for Sweden there is a loading on both factors, negative for interventionism. This indicates a different structuring of attitudes about compulsion, not linked to state minimalism in the German case and ambivalent on this issue in the Swedish, possibly reflecting assumptions about work ethic. However, the overall similarities in pattern support the view that attitudes to labour market issues are best understood not as a simple OSR/ NSR division, but as aspects of a wider structure of attitudes about state welfare.(p.62-63) "The pattern of attitudes indicates that it is more appropriate to think in terms of values about state interventionism and the role of government, rather than the specificities of OSR and NSR policies.(p.63) | | |
| Duman (2010) | Occupational unemployment rate is explanatory for the demands for social insurance along with income' (from abstract)- "occupational unemployment rate and individual income are the key factors determining public support for social insurance" (p.152)"My main finding contradict the thrust of the recent literature, which states that skill profiles-measured by human capital investment- and the type of welfare regime in a country will be interrelated" (ibid) | | |
| Petterson (2007) | "…the difference in political action between a satisfied and a dissatisfied citizen is small in all countries, and the predicted level of political action for a very dissatisfied citizen does not exceed the threshold 1, indicating that one type of action has been taken. Of the included control variables, education proves to be an important explanatory factor in all 14 countries. Left-right placement has a significant effect in all countries but Portugal. The more to the right, the lower is the level of political action. Turning to the question on regime differences, no real tendency can be discovered" (p.159) "Since the relationship between dissatisfaction and political action is insignificant in 6 of the 14 countries, and weak in 8 of the chosen countries, no coherent conclusions can be drawn on the usability of the regime typology in understanding cross-national differences in welfare-state related attitudes and behavior" (p.160). "The overall conclusion in this chapter gives us something to think about when discussing the impact of institutional design. We can say that institutional design evidently matters, for we have traced the pattern that different dimensions of empowerment work in different directions. (p.179). | | |
| **Mixed studies** |  | | |
| Smith & Polyani (2003) | "We found variation in the level of social capital measures across the three different welfare state. Socially oriented norms are not strongly correlated with each other, or with socially oriented behaviours. The presence of socially oriented norms or behaviour did not reduce the likelihood of lower income groups reporting poor self-rated health, relative to the highest income groups" (abstract) | | |
| Larsen (2006) | The main contribution from the book is to develop a theoretical framework that enables us to explain how the institutional structure of the different welfare regimes influence public support for welfare policy. The theory is established by combining the welfare regime theory with the theory of deservingness criteria. The theoretical framework is inspired by the classic thesis that means testing in contrast to universalism gives the public a negative perception of recipients. But the combination of welfare regime theory and deservingness theory enables us to specify this classic argument and open a broader theoretical perspective that includes the influence from the generosity of the welfare state and the job opportunities provided by the regime specific labour market. In the case of policy that improves the living conditions of poor and unemployed it seems promising to replace the 'economic man' and the 'sociological man' found behind many previous studies with a 'political man' , whose policy attitudes are influenced by the experienced regime-dependent reality. Naturally, attitudes might also be influenced by societal norms and values, self-interest and class interest, but in order to explain the cross-national differences it seems promising to equip the electorate with a more reflective mind. We have showed how three characteristics of Esping-Andersen's welfare regimes are likely to influence the public perceptions of poor and unemployed. This led to a number of testable theses that specified the intervening variables between the welfare regimes and support for welfare policy. It could be a future framework for analyzing cross-national differences in welfare attitudes that avoid the simple 'is Esping -Andersen right or wrong discussion'. Conclude that the influence of public opinion is most observable in situations where governments pursue a policy that contradicts the ideological positions of the parties included in the goverment. In contrast to USA, the politicians’' cuts in unemployment benefits and social assistance in social democratic regimes have clearly been a matter of blame avoidance. Hence, in the cases of 'extreme' public opinions about poor and unemployment we have evidence that seems to confirm the influence of regime-dependent attitudes on welfare policy. Following the logic of path-dependency one could argue that the findings of this book might help uncover some of the pieces in the big puzzle of regime-dependent transition process. Esping-Andersen argued in 1996 that the welfare regimes tended to follow a Scandinavian route, a neo liberal route and a labour reduction route in this transition process. Thus, instead of a static reproduction, we have a dynamic development, which could lead to the prediction that meeting the challenges of the post-industrial era the future support for welfare policy would decrease in the liberal regimes and increase in the social democratic regimes. In the former case, the argument would be that the neo-liberal labour market trajectory tends to produce more and more negative perceptions of poor and unemployed, which leads to more and more targeted, tight fisted policies and more and more unregulated labour markets. This again leads to a deeper cultural gap between the majorities and poor and unemployed, which altogether make it more and more difficult for the latter to fulfil the five deservingness criteria. By looking at data the author find data supporting this development. There are three concrete trends in most Western welfare states that are likely to influence future public support for welfare policy. Firstly the fiscal limitation of the welfare state is likely to become a permanent condition for welfare state development in the foreseeable future. It seems reasonable to expect that 'political men' of the future will have both the degree of deservingness and the limited capacity of the state in mind when they form their preferences for welfare policy. Secondly, the tendency to target public benefits at those in need might make it harder for recipients to fulfil the deservingness criteria, which then tends to erode future public support. Thus, what in the short run seems to be an effective and socially acceptable way to save money could in the long run erode future public support for welfare policy. Finally the increased immigration poses a threat to public support for welfare policy in the future. The recent increases in the stock of immigrants in European countries combined with high unemployment rates and discrimination on the European labour markets could potentially generate the perception of a culturally distinct underclass, which is believed to play such a prominent role for support for welfare policy in the US. | | |
| Svallfors (2004) | "The first part of this article raised the issue of whether different types of welfare states tend to differ in how they structure class conflicts about welfare policies. Do the most market oriented 'liberal' welfare states tend to produce the sharpest class differences in attitudes, or is it the most 'social democratic' universalistic welfare states? Results in this article suggest that none of these alternatives receives clear-cut support. Neither do Esping-Andersen's conflict scenarios get support from data. Of the four countries compared here, class differences in attitudes were clearly largest in Sweden followed by Britain. Class differences were smallest in Germany when views about government responsibility were analysed and smallest in the USA when attitudes to welfare spending were in focus. "(p.130) "In the second part of the paper Sweden was focused on in order to study changes in the class structuring of attitudes. A basic stability in class differences in attitudes was found to co-exist with changes among non-manual employees in their views about welfare policy spending, financing and provision." (pp132-133). "Returning to the perspectives from which this paper departed, it seems we find neither an erosion nor a sharpening of class differences in attitudes."(p.133)/ | | |
| Taylor-Gooby (1999) | Welfare values in relation to state redistribution and the role and significance of the market do not follow divisions of regime theory nor do they conform to the free market premises. most people endorse interventionist welfare state committed to the improvement of social equality, they do not concede market principles that inequalities are essential to improve national prosperity, they do not accept that those with higher incomes should be able to buy better health care and education and even more so in liberal regimes, conflicts between different groups found with working women endorsing ws and private sector workers endorsing the market inequality model of society. suggestion and conclusion as for implications of these findings: increased reliance on market principles is likely to collide with citizen's enthusiasm for interventionist state welfare, as welfare changes proceed the market itself is likely to produce conflicts about the role of the welfare state between those who identify their interest with market freedom and those who feel a need for supportive collective services | | |
| Roller (1995) | As surveys include few indicators on socio-economic equality policies the chapter could only answer some of the theoretically relevant questions on beliefs about socio-economical equality policies. The data show that there is considerable support for some types of equality policies. This might be because many scholars think of equality as a radical equality of result. instead we have examined policies aiming at moderate equality of result, and thus, those types of equality policies which are common among the West European welfare states. Overall, Western European citizens show strong support for these moderate socio-economic equality policies, but the data also indicate the limits of support for such moderate policies. Provision of a guaranteed income - a policy aiming at establishing national minima- which gets the weakest support among Western European policies. However, the related policy of providing jobs gets more support. Macro-level analysis hint that differences in standards of living explain differences between Western European countries. Surveys from 1980s show significant negative relationship between levels of support for socio-economical equality policies and level of income equality, another survey, also for the 1980s reveals a negative relationship with the wealth of a country. These relationships indicate that, with increasing equality of income and increasing wealth of a country, support for socio-economical equality policies declines. The comparative data for the mid 1970s show no systematic relationship between standards of living and support for socio-economical equality policies. We suggested that the absence of such a link is due to the emergence of socio-economical equality at the top of the political agenda during the 1970s whereas it disappeared during the 1980s. Poor data did not allow authors to provide a definitive answer to the central question of how support for socio-economical equality policies have developed over time. When looking at political cleavages the consensus on socio-economical policies declined between the 1970s and 1980s. Finally the analysis reveal that support for socio-economical equality policies is stronger than one might have expected. However, the analysis of socio-economical policies reveal significantly stronger support for this other dimension of the welfare state. | | |
| Borre (2003) | Create 3 factors; welfare (demands for spending on health services, retirement, unemployment benefits), humanitarian (education, environment, culture and arts) and Authoritarian (defence and law enforcement). "People's demand for higher or lower expenditures on the public budgets may not constitute a sound basis for the financial policy of a country. Still, when these demands are treated as attitudes towards the goals of government, they form quite consistent belief structures that seem to be embedded in a broader political culture such as the one characterising modern Western Europe. We have utilised these data to identify three goals of government, which we have labelled the authoritarian state, the welfare state, and the humanitarian state. Each of these goals has an agenda of specific budget items that is supporters seek to promote, though not always at the cost of other items. Consistent with most theory about the value change and political agendas, we find the humanitarian agenda to be prominent in the younger generations, whereas we find the authoritarian agenda to be supported especially by older voters. However, in spite of the generation effect, the aggregated support for the humanitarian agenda declined in the Western European countries during the 1990s" (p. 190-191). "As in the case of the temporal data, we find that forces affecting the opinion climate tend to work across the whole electorate of a country, leaving the structure of budget demands in the electorate unchanged. Thus, budget demand data are more volatile than data concerning political values and ideologies. But they are structured in much the same fashion, and the picture they give of party systems and issue conflicts is sometimes clearer than that given by other attitudinal data" (p.191). | | |
| Saxonberg (2005) | "The Czech republic represents a critical case, since many social scientists have singled out the country as the one post-communist case where class is important and party competition centers on socio-economic issues. However, the results of this study refute the claim of Czech exceptionalism and support Ost's hypothesis that classes are in flux during the transition, which hinders workers from understanding their class interests. Class cannot significantly explain pro-welfare attitudes in the Czech republic. Meanwhile, in a comparable West European country, Sweden, class actually provides the strongest explanation of welfare attitudes and this difference in the explanatory value of class is statistically significant. Moreover, the hypothesis that citizens in post-communist countries are not aware of their class interests gains support from the fact that Czechs are generally much mroe positive toward welfare programs and increased welfare spending than Swedes, but less willing to increase taxes in order to finance such measures" (p.312)."This study also refutes Zagorski's (1994) hypothesis about understanding complexity. He claims that educational level is especially important for post-communist countries, because of the nature of the complicated economic and socioeconomic reforms, which post-communist regimes must carry out during the transition to a market economy. According to this logic, those with higher education are more able to understand the need for reforms that will lower living standards in the short-run in order to raise them in the long run. It turns out, however, that educational level explains much more variance in Pro-welfare attitudes in Sweden than in the Czech republic and that this difference is statistically significant. The most ambivalent result is the relationship between pro-welfare attitudes and voting. On the one hand, in Sweden pro-welfare-attitudes explain a much greater portion of the variance in voting than in the Czech republic. On the other hand, the unstandardized coefficient is actually stronger for the Czech republic. A reasonable interpretation is that welfare attitudes influence the voting of average Czechs more than average Swedes, although this difference is not statistically significant." (pp. 312-313) | | |
| Larsen (2008) | "The combination of welfare regime theory and deservingness literature allowed us to specify the link between the macro level of welfare regimes and the micro level of public attitudes. This combination also allowed us to operate with a 'political man' whose formation of attitudes was less ''mechanical' and more open to perceptions of reality. To heroically put it, it has been an attempt to provide the grand theories of welfare state development with a better micro foundation. It is clear that more empirical research must be done in this field. By using the World Value Survey from 1990 , we were able to verify a connection between welfare regimes and perceptions of the poor and unemployed. We were also able to verify the presence of a strong connection between perception of control and identity and support for welfare policy." (p.163) | | |
| Edlund (2007) | "The short version of the story told in this chapter is a refutation of the claim that countries facing severe material inequality and social insecurity provide an environment that is likely to propel class-based conflict over state-organized welfare policy. If factual differences in material equality would drive class conflict, it would be puzzling that class conflict on the terrain of the welfare state is more salient in Sweden and Norway- countries in which material inequality and social security, regardless of measurement applied is far less significant than in countries travelling on the liberal welfare regime path. The answer provided to this puzzle is that organized interests in the role of translators of welfare state institutions have a lot to do with the political cleavages that exist in a society. That does not mean, however, that organized interests can dictate to the public and create cleavages at their own will. The point is that inertia, not change, is the most likely outcome as far as the contemporary development of political cleavages is concerned .The mutual interactions between the public and institutional translators impose constraints on the actors-a process that facilitates path dependency. Let us return to the opening statements by Esping-Andersen. Yes, it might be true that the welfare state shapes patterns of stratification. However, whether emerging patterns of stratification - mirrored in material inequality-translate into political mobilization is less than certain" "The findings suggest that in countries where classes are heavily differentiated along the economic dimension, corresponding divisions in the social dimension-understood here as attitudes toward the welfare state- do not measure up". | | |
| Nordlund (1997) | "Each population is examined as an entity, the empirical findings give no signs of weak popular support for traditional Scandinavian social policy, with the possible exception of the state and municipalities as service providers. The general conclusion at the highest aggregate level is, therefore, that the Scandinavian welfare states continued to enjoy strong support in the early 1990s. However, the data have signs of ambivalence among Scandinavians that should be addressed. Solid support for welfare spending, financing and to some extent the state and municipalities as service providers were combined with relatively weak support for public administration and considerable suspicion of misuse and fraud regarding social programs" (p.244) "Moving to the second purpose, institutional characteristics provide a good guidance for an understanding of attitudes toward social policy in the Scandinavian countries. There is reason to believe that Esping-Andersen (1990) is right when he argues that the welfare states in the Social Democratic regime not only enjoys solid support among workers but also among the middle class. Furthermore, Esping-Andersen's regime theory seems to contain some truths concerning sector cleavages in countries belonging to the Social Democratic regime. The data also suggest that support for specific social programs follows a pattern in the Scandinavian countries.`' (p.245) | | |
| Bean & Papadakis (1998) | "Norway scores higher than the other countries on providing jobs for everyone who wants one. Norway is also ahead on support for the unemployed. However, the margin between Norway and Italy is not great in terms of providing jobs. Norway is among the leaders (with Italy and Britain) in terms of strong support for health care and provision for the old. Despite these important findings regarding Norway, the most striking impression is one of strong support for the welfare state in all countries, including liberal, conservative and universal social democratic regimes" (p.219) "In every country, except the US there is more overall support for statutory intervention measures than for government spending. In particular, Norway, our representative of the 'social democratic' welfare regime, ranks high on statutory intervention, but relatively low on support for government spending, down with 'conservative' West Germany and 'liberal' US." (p.219) "Our analysis demonstrates that the argument about the variation in mass support for services in different types of welfare regime is weak. The time-series and cross-national data show that even in liberal regimes there is not an overwhelming body of opinion against supporting the poor and disadvantaged." (p.230) "The marginal effects of social location and the strong support for welfare services across all countries in both 1985-86 and 1990 lead us to reflect on how the middle classes remain morally committed to the welfare state. This commitment overshadows both many attempts to mobilize self-interest and arguments about the significance of self-interest in determining preferences. "(p.231)"The legitimacy of the welfare state appears to have remained intact, despite the turbulence reported by many writers in 1970s and 1980s" (p. 232). | | |
| Pettersen (1995) | One of the main conclusions is that no single theory alone allowed us to anticipate who are the supporters and the opponents of welfare programmes. We have to be aware of the shifting relevance of different theories as a consequence of national politics and the changing nature of the welfare state. Nonetheless, several conclusions seem indisputable. First there is no evidence that welfare states, or specific welfare programmes, are generally losing support over time, as some theories predict. Rather, there are ups and downs in their popularity. The 'downs' seem to be connected to general changes in the national political mood. Vigorous conservative campaigns, sometimes leading to electoral victories, are accompanied by a decline in the proportion of the public demanding expansion the welfare state, or even an increase in the proportion supporting reduction in spending. Rather, the opposition created by conservative politicians tends to fade away as the novelty of their messages become yesterday's news and the public have direct experience of poorer services. Secondly, to explain which groups promote or contest the welfare state, a complex relationship has to be considered. Several of the theoretical arguments are relevant but each explains only part of the process leading to different attitudes. Certainly, theories predicting a continuous decline in support for the welfare state failed when confronted with the evidence. None the less, the groups which are supposed to be primarily responsible for challenging the welfare state- the well educated and the rich- are indeed among the most sceptical about the expansion of old age pensions, public health services and unemployment benefits. The younger generation is also more sceptical than the older generations about the old age pensions and health services, which accords with generation theories. But this pattern of support is also consonant with an interest interpretation: the older generation is particularly supportive due to their vested interests in old age pensions and 'free' health care. We also noted that the young behaved quite differently over unemployment benefits, where they might be thought to have vested interests. Finally, class identification and party adherence are stronger correlates of attitudes towards social security than any other variables. this indicates that welfare policies continue to be a matter of class politics, suggesting that theories of class formation provide a superior explanation for people's spending preferences on welfare programmes over the entire time period analysed. This conclusion is reinforced by the impact of party adherence. Electors who vote for leftist or working-class parties are more inclined to support spending on welfare programmes than those voting for centrist or conservative parties, even after controlling for class position This relationship, too, is remarkably stable from the 19960s until the early 1990s, and is by far the best predictor of spending preferences. Some differences across countries are found when analysing the different dimensions, however they are not emphasised in conclusion of findings nor in the theoretical argument. National political moods are differences in political context emphasised when these tendencies are observed. | | |
| **Government responsibility** | | | |
| Jaeger (2007b) | | | "My empirical analysis of eight western industrialized countries shows that public support for two groups of deserving needy, the old and the sick, is remarkably high and does not differ across countries. On the other hand, support for government responsibility to provide for the poor and the unemployed is much lower and diverse across countries. When applying the CHOPIT model to correct for cross-national heterogeneity, I find that cross-national similarities in levels of public support for the deserving needy appear even more pronounced. That is, once nationally idiosyncratic perceptions of the response scale is accounted for, respondents in the eight countries under study all seem to agree to an even higher extent that the government should claim responsibility for the well-being of the old and the sick. When examining threshold variability across countries, I find significant variation in the ways in which respondents from different countries interpret the scale of the dependent variables. However, it is difficult to provide any substantive interpretation of why respondents in different countries have different interpretations of the scales." (p.89) |
| Luo (1998) | | | "In studying public attitudes towards government's role in solving unemployment, we have found that in the main, SES affects such attitudes only insofar as it shapes the attitudes towards government's responsibility in reducing income inequality in society. The relationship between the two types of attitudes can be described as that between means and goals, or between specific policy preferences and general values. We demonstrate that in both Great Britain and the USA, the goal attitude (or the general value) has by far the biggest predictive power for the means attitude (or specific government policy). Moreover, the effect of SES on the means attitude is largely eliminated once we control for its effect on the goal attitude. We suspect that this is because SES characteristics tend to expose people more to general values/beliefs than to stances on specific policies. Limited by data availability, this study employs a cross-sectional design. Although some SES characteristics, party affiliation and perception are indeed more stable than the goal and means attitudes and are very likely to exist prior to the latter, a longitudinal study with information about people's attitudes in different time points will further test the causal links suggested in this study....Also largely ignored in opinion research is the effect of people's perceptions of social mobility on their attitudes towards government's role. We find that for both countries, those who perceive less intergenerational mobility in society are more likely to endorse government's responsibility in reducing income inequality. People's perceptions of social reality affect their attitudes...A bit surprise is that despite the many cultural and structural differences in Britain and the USA, we find that the overall process of means attitude formation is very similar in the two countries: the formation of an attitude towards government's responsibility in reducing income inequality is the most important intervening mechanism. Nevertheless, we do see important differences within the process. Education and family income are found to be more important in influencing people's attitudes in the USA, whereas party affiliation is more important in Britain. The link between the goal and means attitudes is stronger in the USA than in Britain." (pp.138-139) |
| Kalenthaler & Ceccoli (2008) | | | "The results showed that citizens are conditioned mainly by their economic self-interest, their attitudes toward risk in life, and the context in which they form their opinions. Our analysis shows that individuals do, in fact, calculate the expected economic cost and benefits of who should be responsible for welfare provision in predictable ways" (p.1059). "This study's most significant contribution, however, has been its assessment of the relative importance of psychological factors in shaping opinion toward welfare provision. We find the empirical significance of the risk acceptance variable to be revealing in the sense that psychological explanations are relatively absent in the welfare support literature..It is also important to stress how important the national context is to the shaping of individual level attitudes toward welfare provision. It is evident that country-specific context creates different effects on the explanatory power of some of the variables. In particular, the risk acceptance variable and the ideology variable show different patterns in the pooled model and the county-specific models." (p. 1060). |
| Forma & Kangas (1999) | | | "The results show that in all three countries there is a substantial scepticism against such a marginal pension policy model where there are no basic pensions at all and where the individuals themselves save for their old age. This kind of marginalism was more popular in 'liberal' Australia than in 'corporatist' Poland, or in 'universal' Finland, and Australia leads in the support for selectivism, while universal benefits are most popular in Finland. However, again it must be pointed out that universal basic pension in all three countries are far more popular than selective benefits or the marginal self-help model. The majority of the Australians and the Finns will complement basic pensions by compulsory superannuation, organised through private insurance companies, while the Poles are in favour of voluntary superannuation administered by the government. When it comes to benefit diversification, pensions diversified according to the claimant's work history and contributions paid rather than income are regarded as more legitimate..Our results display that the national contexts make a difference: country dummies were in most cases highly significant. There seems to be some correspondence between the national welfare state models and popular opinion when it comes to the construction of basic pension security. Countries behave 'as they should': Australians are the most eager proponents of selective benefits whereas Finns lead in the support for universal benefits. The correspondence between opinions and national pension programmes is broken in superannuation schemes. The Finns seem to be hostile to their totally income-graduated pensions, whereas benefit diversification is much more popular among the Australians and the Poles....The overall impression on our regression models basing on the 'traditional' explanatory factors (gender, class and political affiliation) of the welfare state expansion was that they do perform poorly in explaining variation in basic security (pp 181-182) |
| Peillon (1996) | | | Merit does not seem to undermine support for social services, "Merit is at best one factor in a combination which leads to a high level of support" (p. 187) "Evidence indicates that this support is based on values and beliefs, and not predominantly on self-interest. This does not mean that self-interest is not involved, simply that it does not play the dominant role. ...The so-called Titmuss hypothesis receives no strong backing in our analysis; this actually follows from the low relevance we have noted for the factors merit/need/right. The hypothesis loosely derived from Esping-Andersen's classification fares a little better. However, most of these factors are superseded by the significance of the scope (wide) and nature (transfer) of welfare programmes" (p. 189) |
| Andersson (2010) | | | " The Mokken scale analysis indicated that there are differences between welfare regime types and welfare attitudes. Respondents in social democratic and conservative welfare regimes are more likely to have positive attitudes toward welfare policies that are not considered ‘major’ welfare provisions (pensions, healthcare and unemployment). The nested regression models indicated that left party supporters has more pro-welfare attitudes in all countries regardless of welfare regime type. The results indicate that different welfare regime types foster different welfare attitudes in the Mokken scaling but it was not possible to differentiate between welfare attitudes and welfare regime types in the nested regression models." (p.12) |
| Taylor-Gooby (1998) | | | "We have found some differences in the patterns of support for welfare policies between the major European states and in most policy areas a weakening of support over the years. Since that decline is happening in parallel in different countries, there is no evidence of convergence between public attitudes in different countries. Such differences as we do find, do not comply with the assumptions of the dominant strands of the welfare state theory. In particular, contrary to the implications of the model, British opinion does not appear to be strikingly less supportive of welfare in general than that in corporatist countries, and is in fact noticeably more supportive of some of the more integrative aspects of provision. The recent trends in welfare policies towards an emphasis on jobs rather than benefits finds sympathy in German popular attitudes, while benefits are favoured in Sweden." (p.71) |
| Koster (2009) | | | "With regard to the question whether individuals or the government should be responsible for the welfare of the people, the mean levels differ across countries: in Austria, Sweden and France there is a stronger preference for individual responsibility and people in Hungary, Latvia and Slovenia are more in favour of government responsibility" (p.15) "Furthermore, Table 1 shows that, on average, the preference for government responsibility increased slightly between the two waves of the EVS/WVS" (P.15)"The finding that the preference for government responsibility and income equality increases needs further examination. There are two contrasting ways in which to interpret this empirical finding from this study. On the one hand, this may imply that the EU serves as a safeguard against other international developments like globalization. According to this interpretation, the EU forms a buffer against these international threats and increases people's trust in the welfare state and their support for such collective arrangements. On the other hand, the explanation may be found in the opposite direction and be in line with research focusing on the increased insecurity from international trade, stating that people demand more security from their government (p.20) "It turns out that people living in EU member states are more in favour of government responsibility. However, there are no differences between people in member states and non-EU members when it comes to their attitudes towards income equality, as this variable has no significant effect. Moreover, trade with the EU is associated with a lower preference with a lower preference for government responsibility, while it is positively related to the preference for income inequality" (p. 18) |
| Kumlin (2007) | | | "While dissatisfaction has a tendency to undermine support for state intervention, it tends to push citizens to the left in the subjective sense" (p.96) "First, in many countries, dissatisfaction does not have a significant impact at all; there, neither the overloading nor the undermining processes seem to be at work. Second, consistent with our hypohtesis, undermining are to be found in teh three Scandinavian welfare states, though also in some other countries (Germany, Spain, Switzerland). Third, the overall negative effects in Table 3.1 hide the fact that at least on of the dependent variables indicate that dissatisfaction increases support significantly in Portugal and almost significantly in the Netherlands. In other words, it seems that whereas undermining mechanisms are more pronounced overall, overloading processes may well be under way in small subset of countries" (p.97) (this is dissatisfaction on state intervention) "The first column reports the results for state intervention support. They show support for the prediction that dissatisfied Scandinavians are more prone than other dissatisfied Europeans to abandon ideological support for leftist state intervention" (p.101). ..there is more support for the undermined-welfare-state perspective: our data predict that in social democratic welfare states with little political power dispersion, dissatisfied citizens become less supportive of state intervention but more inclined to report rightist ideological left-right self-placements. And although such institutional conditions are not simultaneously present in Europe, the results do suggest that the undermined-welfare-state perspective has an explanatory potential....In the real world, however, the explanatory potential of the undermined-welfare-state is heavily suppressed by existing institutional configurations. Because most existing European political environments tend to be rather power-dispersing, and because most European welfare states can be seen as ideological compromises rather than pure implementations of a single ideology, most Europeans do not dramatically change their ideological orientations, even when they are seriously dismayed with core welfare state outputs. Still, the results are interesting as they tell a different story from past studies reporting positive effects of dissatisfaction on more specific policy and spending preferences. If we add our findings to this research, it seems that overloading and undermining processes occur simultaneously, albeit at different levels of attitude abstraction. Whereas dissatisfaction overloads the welfare state with ever more demands at a concrete attitude level, this chapter suggests that it has at least a potential for undermining support at a more general level (p.110-111) "...the dominant feedback effect of welfare dissatisfaction is that it undermines general support for political institutions, parties and politicians. It is the legitimacy of the democracies of Western Europe- rather than its welfare states or its incumbent governments- that will really suffer from increasing welfare dissatisfaction" (p.112) |
| Gelissen (2000) | | | "First indicators of moral commitment to the welfare state, as exemplified by higher educational attainment, trade union membership, a leftist political stance on the political spectrum and a post-materialist value-orientation, perform relatively well when it comes to explaining people's preferences for an extensive and intensive welfare state...An interesting finding is that educational attainment not only independently affects people's supportiveness for the welfare state, but also an interaction with socio-political orientations...Second, self-interest enters the picture mainly through the dependence of transfer classes on the provisions of the welfare state. For the greater part, the data supported the hypothesis that individuals who belong to a transfer class will be more supportive of an extensive and intensive welfare state. However, the attitudes of people with low incomes did show to be very much different from the attitudes of other people. As far as an effect of income on the preference for an extensive welfare state was present, it appeared to be dependent on people's post-materialist value orientation. Third, some indications are found for the presence of class differences, which were mainly reflected in the levels of support for an intensive welfare state. However, the differences were not particularly strong....These findings also show that not only does a structural position in the stratification system amount to a self-interested motivation to support the welfare state, but also that a particular ideological position implies one or more motives to give more support. Fourth and lastly, no evidence was found for the thesis of there being a relationship between the type of welfare state, as defined by Esping-Andersen, and levels of popular support for the welfare state" (P.298-299). Highest support found in the liberal regime, whilst social democratic countries do not show expected high levels of support. "The most important conclusion of this article is that the welfare state was still strongly legitimated among its citizens at the beginning of the 90s, even after a period of intensive restructuring" (p.299). |
| Svallfors (2003) | | | "..there is no support for the notion that conflict patterns, as mirrored by attitude differences between different groups should vary in any systematic manner between different welfare regimes. Differences in attitudinal patterns do exist, but they rarely follow the borders between different welfare regimes. Patterns are furthermore quite similar between different welfare regimes. Groups with weaker market position, such as workers, women, and the unemployed are more supportive of welfare state intervention than groups with a stronger market position are" (p.189). "Expectations that attitudes towards welfare policies should differ systematically between different welfare regimes receive little support. At an aggregate level large differences are certainly found between the countries. Between the citizens of Norway and those of the US there are considerable differences in the role they want government to play. The rank order between countries is also as could be expected, with 'social democratic' countries being the most supportive of state intervention, and 'liberal' countries the least with the 'conservative' and 'radical' countries in between. However, differences within the 'regime pairs' are sometimes just as large as between them. The latter is also the case when we compare group differences across welfare regimes. On the whole, such differences are rather similar in all countries. When interesting differences occur, they rarely follow the demarcation lines between different welfare regimes. Furthermore, such differences hardly ever follow the fault lines suggested by Esping-Andersen and others. Class differences, for example, are larger in Sweden and France than in the 'liberal' countries, attitude differences between 'insiders' and 'outsiders' are smallest in the 'conservative' countries; differences between men and women are not larger in the 'social democratic' countries than elsewhere. The assertion about how conflict patterns should vary between different welfare regimes get support in one single respect: attitudinal differences between private and public sector employees are larger in Sweden and Norway than in other countries. At the same time these two countries are more marked by class differences and by differences between different labour market statuses than by the gender/sector-based conflict that was suggested as the main fault line" (p.513-14). "In conclusion, it seems time to assert that attitudes to welfare policies are only to a very limited extent structured by differences in welfare regimes. A more plausible interpretation is that such differences are structured (a) by general mechanisms, based in the division of labour in capitalist societies, and (b) by nationally specific institutions when it comes to public policies and organised politics. The latter only to a limited extent follow the demarcation lines between different welfare regimes" (p.514). |
| Tworzecki (2000) | | | "This study has shown that in the mid-1990s Polish and Hungarian survey respondents expressed overwhelming support for welfare-state policies of a type often thought dangerous to the electoral fortunes of market reformers. Support for these policies can be interpreted as a commitment to a specific kind of social justice in which redistributive goals are pursued by a state actively involved i the equalization of economic differences." (p.25) "Of at least equal importance are the attitudes of respondents toward the transformation process itself, as well as their ideological commitment to either the left or right side of the political spectrum. Welfare-state attitudes were found, however, to be only weak predictors of voting intentions. There were three likely reasons for this. First, these preferences were widely shared by almost the entire electorate, second the parties' economic policy platforms were poorly differentiated, and finally, the election campaigns were dominated by the symbolic politics of anti-communism "(p.25) |
| Breznau (2010) | | | “Those who favour reducing social inequality are most likely to support welfare-related policies including government control for social services, price controls and subsidies for basic needs of electricity, food, housing and health care" p. 477 "citizens of formerly Communist countries are more likely to support price controls and subsidies than their traditionally capitalistic counterparts" (p.478) "SES and demographic characteristics including family income, education, occupational status, sex, age, and church attendance show little to no importance in explaining support for welfare policies" (ibid)"A side finding emerged in this analysis showing that education in five out of six instances in Bulgaria and Poland proved extremely important in addition to egalitarian ideology in shaping welfare policy opinion" (p. 479) |
| Goerres & Tepe (2010) | | | "Our findings can be condensed into three statements. First, intergenerational solidarity matters for older people's attitudes towards public childcare provisions. The motivation of exchange within the family, or altruism rather than pure self-interest, appears to be important for this policy attitude. Second, even though a welfare state regime typology can only partially help us to understand differences between countries, we find that the relationship between intergenerational solidarity depends on societal context. Whereas, generally speaking, more solidarity leads to higher support, there are some contexts in which this effects shrinks to nil. Third, according to the exploratory analysis of twelve countries, influential contexts are characterised by various dynamics; political (the general level of family spending by the state), economic (the extent to which women are integrated into the labour market) and cultural (the public opinion towards working mothers). Overall, the findings suggest that the demand for welfare state policies by older people can also be influenced by their own family involvement and is not only subject to egocentric consideration" (p.820). |
| **Inequality** | | |  |
| Laczko (2005) | | | "The overall level of perceived income inequality and overall level of support for state activity was higher in Great Britain than in Canada in 1992, but these differences had narrowed by 1999. On the issue of market forces in health care and education, neither Quebeckers nor Scots manifest a significant difference of opinion from the rest of their compatriots in 1999" (abstract). "The downward shift in overall support in Britain can be considered a modest bit of evidence to suggest that public opinion in Britain might indeed be moving in the direction of a somewhat less interventionist welfare state. It remains to be seen whether an extensive analysis of the full 1999 international data set will modify Evans' (1996) classification of Britain as closer to the European pattern based on the 1992 data, or modify Canada's classification as being closer to the United States than to any other country (Laczko 1998). The multivariate analyses reveal that both Québec and Scotland displayed higher than average levels of support for state intervention to reduce inequality in 1992. After statistical controls for other independent variables, the 'minority national' effect is evident in both countries, but somewhat stronger in Canada than in Britain. In 1999, Québec once again shows a significantly higher level of support than the rest of Canada after controls. This time, the minority national effect is visible in Canada but not in Britain, since residence in Scotland does not have a significant effect. On the issue of market forces in health care and education, neither Quebeckers nor Scots manifest a significant difference of opinion from the rest of their compatriots in 1999. With respect to Scottish attitudes, these patterns appear similar to those found in the 1997 British Social Attitude Survey data by Brown, McCrone and Paterson (1998: 164): while there might be a slightly higher level of support for the welfare state in Scotland than in England, there is also variation between English regions and no clear separation on these issues between Scotland and England.3 The battery of standard sociological variables included in the explanatory models explain slightly more of the variance in Britain than in Canada in 1992, as shown by the slightly higher proportion of the variance explained (given by the adjusted R-squared statistic) in Britain. In 1999, the models explain slightly more of the variance in Canada. In both Québec and Scotland, a greater preference for state intervention and redistribution has become associated with minority nationalism. One would expect, then, that those respondents with the most nationalist orientations would be the ones who are the most in favour of a strong welfare state. Indirect evidence of this is provided by the fact that Bloc Québécois and SNP voters are indeed found to be more supportive of state intervention and redistribution. The data sets analysed here do not contain any measures of minority nationalist attitudes that would allow a more direct examination of the nature of this link, although a direct connection has been established elsewhere for Scotland (Paterson 2002: 212). Further indirect evidence for the connection in Québec is suggested by the finding that those with a more Québec-nationalistic orientation are more aware of linguistic inequalities, at least in the 1970s and 1980s (Laczko 1995: chap. 6). " (conclusion) |
| Aalberg (2003) | | | R2 bivariates between support for the ideal of equality and egalitarian policies 0.01 and increases to 0.33 without Poland and Hungary |
| Sachweh and Olafsdottir (2010) | | | "On the aggregate level, we find clear and interpretable differences across regimes. While Americans view their society as highly inegalitarian, their aspirations for a more egalitarian shape of stratification are smaller than those of Swedes or West Germans. Thus, perceptions of high levels of inequality do not automatically seem to translate into stronger egalitarian demands. This can also be observed with regard to the attitudes of East German respondents, which resemble those of Americans. East Germans and Americans display the most inegalitarian perceptions of the stratification reality of their respective society, but at the same time also have the lowest egalitarian aspirations." (P.160) "Conversely, Swedes’ perceptions of their stratification reality are the most equal ones, yet not quite as equal as they would like it. West Germans’ perceptions are in between: while they resemble Swedes in their assessment of the German stratification reality, they do display smaller egalitarian aspirations. This ordering of countries corresponds to expectations that can be derived from welfare regime theory (Esping-Andersen, 1990)" (P.160). "Looking at and comparing these two types of perceptions, we find some evidence of country-specific attitudinal cleavages in line with welfare regime theory. We find socio-economic differences for perceived stratification realities and stratification aspirations in the United States, labour market- Insider/outsidercleavages for perceived stratification realities as well as (to some extent) aspirations in Germany, and a gender/sector cleavage for stratification aspirations in Sweden. However, our results are limited to the extent that the satisfaction- and disappointment-hypotheses for group differences receive only partial support: the hypotheses receive the strongest support in Germany, where we find effects in line with the expectations for both perceived realities and aspirations, and they receive less support in Sweden, where only the satisfaction hypothesis for stratification aspirations could be confirmed, and the United States, where only the satisfaction hypothesis for stratification realities could be confirmed. Overall, more evidence supports the satisfaction- than the disappointmenthypotheses. This indicates that aspirations towards greater equality do not seem to be closely related to the patterns of privilege and disadvantage set up (or induced) by the welfare state." (P.161) |
| Taylor-Gooby (2008) | | | welfare values in relation to state redistribution and the role and significance of the market do not follow divisions of regime theory nor do they conform to the free market premises. Most people endorse interventionist welfare state committed to the improvement of social equality, they do not concede market principles that inequalities are essential to improve national prosperity, they do not accept that those with higher incomes should be able to buy better health care and education and even more so in liberal regimes, conflicts between different groups found with working women endorsing ws and private sector workers endorsing the market inequality model of society. Suggestion and conclusion as for implications of these findings: increased reliance on market principles is likely to collide with citizen's enthusiasm for interventionist state welfare, as welfare changes proceed the market itself is likely to produce conflicts about the role of the welfare state between those who identify their interest with market freedom and those who feel a need for supportive collective services |
| Kalenthaler, Ceccoli, &Gelleny (2008) | | | "Overall, we find that considerations such as social attitudinal factors- especially how one perceives the importance of recognizing merit in society- and several economic utilitarian factors- particularly education, income and being unemployed - are consistent predictors of variations in support for eliminating inequality. In particular, we find persuasive empirical support for the influence of the recognition of merit with regard to the issue of eliminating income inequality. The effects of merit have been demonstrated to be a highly robust predictor of support for eliminating income inequality both at the aggregate level and at the country-specific level. ..one's ideological disposition along the left-right continuum matters greatly in predicting support for eliminating inequality in the aggregate..However, such effects begin to disappear when national context is considered. ..it seems evident that citizens are rational actors who calculate their expected personal benefits from economic competition" (p.234). "Potentially even more important than one's material self-interest seems to be an individual's attitudinal predisposition about the issue of income inequality...The result of this study show that one's attitude toward recognizing the importance of merit is the best predictor of how Europeans think about income inequality"(p.235). |
| **Redistribution** | | |  |
| Svallfors (2006) | | | Chapter 4 findings: "Do class differences on the market al.so create class differences in attitudes toward the market and its distribution? Or is Lane (1986) correct in proclaiming the dominance of market fatalism and in his contention that market distribution generates only a small measure of dissatisfaction?...Lane's argument is substantiated by the findings that class differences are often remarkably small and that groups that can hardly be counted among the market's winners also accept an appreciable spread of income and recognize the legitimacy of market principles. This is particularly the case in the market liberal economies of Britain and the United States, where the working class's acceptance of money's ability to buy health care and education in the former and of large income gaps in the latter is astonishing. Lane is also backed up by the finding that attitudes toward income disparity as a necessary incentive are not only widespread in all four countries but also favoured by the working classes more than any other. ...It is, however, interesting to note that in most respects the coordinated economies of Sweden and Germany evince more distinct class differences than the liberal market economies. This suggests that the greater the politicization of market distribution, the more sharply the class differences tend to differ...The reduced class differences in attitudes toward income distribution that we found in all countries except Germany are also of interest in this context, as they suggest that the only country where wage bargaining institutions have remained unchanged over the past decade is also the one with the most stable class differences...The significance of bringing institutions and political articulation into consideration also becomes obvious when endeavouring to understand the results in the last part of this chapter. Here we showed that attitudinal integration was more apparent in Sweden than in the United States and more distinct among the upper non-manuals than among the workers. Differences between classes regarding the integration of attitudinal patterns were thus larger in the United States, where the working class displays a high degree of attitudinal fragmentation." (pp74-75). Chapter 5: "Of the four countries compared here, class differences in attitudes were clearly largest in Sweden, followed by Britain. Class differences were smallest in Germany when views about government responsibility were analysed but smallest in the United States when the focus was on attitudes toward higher welfare spending...In the Swedish case the historical organization of political parties and interest organizations has been profoundly shaped by class. Both labor and capital have had strong and ideologically articulate organizations, and the political parties have had strong class links....In Britain and the United States class differences in actual living conditions are large and the class conflicts at the micro-level obvious. These class relations have, however, been channelled into politics and policies only to a very limited extent. In the United States, the lack of a clear class base for politics is palable: trade unions are extremely weak and the political parties have a very weak class platform. The British case is more complex. Historically, the links between class and parties have been strong and trade unions comparatively strong and at times militant. However, their militancy has been restricted to articulating immediate issues of work conditions and wages while the connection to wider social and political issues, which typifies Swedish trade unions, has been more or less absent...The similarities between Sweden and Britain in aggregated levels may at first appear puzzling, given the large differences in attitudes toward the market and equality that we observed in chapter 4. However, this need not be that contradictory. What Swedes and Britons agree on is the need for a comprehensive public safety net to ameliorate the unequal market distribution and guarantee basic social rights. However, when it comes to deciding the level of state intervention and judging how much equality is acceptable and fair, they part company" (pp 98-99). ..."In the second part of the chapter, we turned our attention to Sweden in order to study changes over time. Here, a basic stability in class differences in attitudes was found to coexist with changes among non-manual employees in their views about welfare policy spending, financing and organization" (p.99)"Returning to the two perspectives from which this chapter departed, it seems we find neither an erosion nor a sharpening of class differences in the attitudes toward welfare regimes." (p.100). |
| Kumlin & Svallfors (2007) | | | "Class politics greatly affect the extent to which we find attitudinal class differences in different countries. More than this, we have seen that both unions and parties are instrumental in this regard: results suggest that both stronger unions and more attention to class issues by parties independently strengthen the class-attitude link."(p.38) "Unlike research on voting, however, our research on attitudes finds that party polarization in class politics is of little importance...The implication is that researchers trying to explain country differences in the effects of stratification on attitudes are well-advised to focus on the toal amount of arguments available to citizens in the political debate, rather than differences between political actors per se" (p.38). "A second main finding is that a negative correlation between the degree of inequality and the strength of the class attitudes link persists even after controlling for various measures of political articulation. Hence, it is not hte case that this negative correlation is simply a result of political articulation of class being more widespread in comparatively egalitarian societies. In sharp contract with the conflict resolution hypothesis with which we began, our findings show that increased inequality does not strengthen class-attitude links. On the contrary, class differences in attitudes tend to be larger in countries with little inequality." (p.39). |
| Coreneo (2000) | | | “Individuals who claim to derive pecuniary advantages from a reduction of inequality are more likely to support political redistribution of income” (p. 10) “In the US there is a statistically significant negative effect of an individual's income on the probability with which he is going to favor political redistribution. In Germany this is not the case. All in all estimation results show that preferences for political redistribution respond very strongly to the selfish pecuniary incentives put forward by standard economic theory” (p. 10) 'The PVE seems to be at work only in West Germany, and only in its direct version - not in Piketty's (1995) mobility version. This finding suggests that both in the US and East Germany political attitudes are mostly shaped by individualistic concern, whereas collective concerns affect the political attitudes of Westgermans” (p. 11) 'The lack of collective concerns in that country might be due to the particular situation faced by East-germans at the beginning of the nineties' (ibid) As for SRE 'one expects income classes with a high prestige as compared to that of neigbouring classes to be less likely to favor political redistribution. In line with that prediction, in all country regressions the variable SRE displays a negative coefficient. However, the estimated coefficient is not statistically significant in the case of East Germany. With respect to the SRE, in the US and West Germany concerns for the own social standing appear to be a significant factor in shaping individual attitudes towards redistributive politics. On the contrary, the SRE does not pass the empirical test in the case of East Germany.” (p. 11)Germans are found to be more supportive than US citizens. The findings show that 'individual preferences are also driven by social factors, which might sensibly alter the conclusions one should draw from the analysis of any particular redistributive issue' (p17). The paper also argues that it confirms public choice theory in its focus on homo economicus. |
| Sabbagh & Vanhuysse (2006) | | | "Our assumption was that two major sets of welfare frames structure citizen attitudes. The first frame, labelled 'market-based', entails three coexistent facets emphasising (a) individual responsibility, (b) work ethic and individual attribution of inequality. The second frame, labelled 'welfare statist', entails three facts which emphasise (d) egalitarian redistribution, (e) broad welfare scope or governmental delivery of a wide range of benefits and services and (f) external attribution of inequality. We have found support for the hypothesised two-level bi-factorial hierarchical model. The six-correlated factor model and the two-level uni-factorial hierarchical model also provided a good fit, albeit a significantly weaker one. These results regarding the dimensionality of welfare attitudes, which point to the suitability of different alternative models, should be further examined and validated in future research. Our findings also supported the assumption that similar schema are salient for respondents across different welfare regimes" (pp 621-622). The two-level bi-factorial hierarchical model, which suggested distinguishable facets of welfare attitudes, was consistent with the results of the more familiar anlaysis of variance technique which showed that regime types do seem to 'differently' matter across these facets. In other words, response variation across facts and regimes indicated that we are dealing with a multifaceted construct." (p.622) "Two main observations can be highlighted. First, response across welfare regimes are more similar regarding individualism, work ethic and external attributions than regarding egalitarian redistribution, broad scope of welfare and internal attributions. These similarities and differences raise interesting theoretical questions regarding the role of the different facets in forming welfare attitudes. Second, cross-regime variation was relatively consistent. In line with expectations, respondents in liberal and radical regimes appear to be more individualistic, to more strongly support the work ethic and to attribute more internal causes to poverty and inequality than respondents in either conservative or social democratic regimes, where the effect varies across facets. Conversely, respondents in the latter regimes showed higher levels of support for egalitarian redistribution, the broad scope of welfare and external attribution" (p622) "Another interesting finding is that, while the liberal and radical regimes rank similarly across facets (scope of welfare excepted), the conservative regime ranks higher than the social democratic regimes on the three welfare-statist facets and lower on the market-based facets (individualism excepted). "(p.623) |
| Svallfors (1997) | | | “The four regime types appear as four rather clear-cut configurations regarding their aggregated levels of attitudes. The social democratic countries combine strong support for welfare state intervention with egalitarianism regarding income differences. The conservative countries combine strong support for welfare state intervention with inegalitarian views on income distribution. The radical countries combine low support for welfare state intervention with fairly egalitarian views on income distribution. Lastly, the liberal world combines low support for government redistribution with inegalitarian views on income distribution. Two deviations from this general patterns are the less than wholehearted support for government redistribution in Sweden, and the relatively egalitarian views on income redistribution in Canada” (p.295). “The anti-redistributive values found in the United States are by now well known but the distinctiveness of Norwegian egalitarianism is no less clear” (p. 295). Norwegian stronger support for redistribution than Swedes! “When it comes to differences between groups, it is rather the similarities between regime types than the differences that are noteworthy. Both class and gender differences are clear-cut and persistent across various national contexts, and there is very little difference in the way in which attitudes are structured by various background factors (p.295) |
| Verneby & Finseraas (2010) | | | The policy-bundling effect, reduction of left voting directly because right parties are more conservative on immigration issues, is significantly more important than the anti-solidarity effect (left-voting indirectly reduced by lowering popular support for redistribution). |
| Crutchfield & Pettinicchio (2009) | | | Acceptance of inequality are beliefs held by the larger population and increased acceptance leads to harsher treatment of others in the population. Countries with higher than average tastes for inequality also have higher income inequality, more population heterogeneity and higher percentages of others in prison. |
| Edlund (1999) | | | "Americans with low confidence in the state are less in favour of government involvement thatn those with strong to moderate confidence in the state" (p.351) "Comparing attitudes to redistribution and financial cheating in Norway and the United States, data suggest that support for government redistribution is considerably stronger in Norway in comparison with the United States. Interpreting attitudinal differences from a welfare state regime perspective, the results endorse arguments emphasising that the design and scope of welfare policies shapes and determines its own legitimacy. The political trust approach, which argues that the efficiency of political decision-making institutions promotes beliefs about trust in the state and furthermore views on government responsibilities, receives less support. Though Norwegians show higher levels of trust than Americans, relationships between confidence in government and attitudes to redistribution is relatively weak in both countries" (p.360-361). "While overall levels of support differ, conflicts over redistribution are similarly structured. In both nations, the strongest supporters are to be found among workers, those with low incomes, women, and in Norway, public sector employees" (p.361-362) |
| Edlund (2003) | | | "The results indicate that the conventional approach to class assignment generally explains more of the variation in the dependent variables than the individual approach ones" (p.209). "Female employment influences are greatest in Germany, closely followed by Sweden. In the US, influences of female employment on working couples' socio-political orientations are negligible" (abstract) |
| Mau in Glatzer (2002) chapter 15 | | | Attitudes to tax level 'fairly uniform regardless of whether or not the people actually belong to the respective tax group' p226; The majority in Britain judge the level of the middle income tax to be about right, whereas the Germans tend to think it is too high. In Germany, in contrast, many wage earners and the employers' organisation have continuous grievances about the high level of income taxation and social contributions p. 226; In all countries, or both Brits and Germans thing the low income group pay too much tax. Lower support for income redistribution in higher income quartiles in all countries, highest in east Germany (1996 numbers); attitudes towards progressive taxation not very important to explain attitudes to redistribution. "The findings presented do not confirm the assumption that the tax burden causes a general disagreement with the collectivist nature of welfare arrangements. The middle class do not withdraw their support for the principle of redistribution on the grounds of tax dissatisfaction. This finding suggests, that the attitudes are not motivated 'only or even primarily by hard-headed economic interests' and that other considerations such as fairness and social justice interfere. The lower classes, instead, call for more welfare state redistribution when they feel that the taxes are too high. The only group where a translation of tax-discontentment into negative attitudes towards redistribution could be traced was the higher income section, but it is also possible that obvious ideological reasons suggest an intermingling of a dislike of taxes and an opposition to redistribution" (p.232) |
| Matheson & Wearing (1999) | | | "Whether statistically significantly or not, women and younger people tend to favour a larger role for the state, regardless of country. Apart from this, the equations are largely recapitulation. Thus in Australia, for instance, the contrast between the state's popularity among the full-time workers versus among the rest again emerges, while everywhere except Norway sees a difference between the employed and the unemployed. Other results are a little more surprising at this level. For instance, while the contrast between full-timers and the out-of-work in the US sample might have been anticipated from the earlier discussion, would one have expected an effect for the retired, whose only evident difference from the employed in the earlier table was a greater incidence of sympathy for the unemployed in this regard? The point of the exercise, of course, comes with the addition of the controls for social class, past and present. It is only then that it becomes possible to see how far apparently substantial effects of labour force status at a point diminish when the broader social relations of respondents are considered. In other words, we see how far, e.g. unemployment or retirement merely proxies for a history in the working class. In fact, the effect of these labour force dummies does indeed fade to insignificance both in the United States and in Norway when the class controls are introduced. In both countries, the self-employed are more anti-government than the 'proletariat', but the US shows a greater impact on this of a service class or farm job or background than does the Norwegian sample. While the relative sizes of the coefficients on these dummies are certainly interesting, and may well say something about the organisation of political identities in each country it is more important to note the main point here, which is that the effects of the labour force status decline when controlled for class. In the Bundesrepublikk, however, conditioning on class history has such effect. Even net of class, it remains the case that retired, part-time employed and especially unemployed Germans remain more favourable inclined to the extent of the welfare state. Such results support the claim that German society is characterised by a distinct insider/outsider split between workers and arbetislos, at least in so far as patterns of question answering are any guide to broader ideological formation. (p.156) |
| Kenworthy & McCall (2007) | | | Greater market inequality does not create greater redistributive programs or preferences |
| Edlund (1999) | | | "Examining attitudes to taxation on the aggregate level in Sweden, Britain and the Unites States, it is rather the commonalities than the differences between nations, as well as the indications of strong public support for progressive taxation that characterise the data. The sizeable cross-national differences in institutional attributes have not left their imprint in distinctively divergent attitudinal patterns towards taxation. There is thus little empirical evidence for suggestions that support for redistributive policies should be more accentuated in social democratic welfare regimes compared to liberal regimes, at least when it comes to taxation. Emphasising variations among countries, it is in Britain rather than in Sweden that we find the strongest support for redistributive policies. While the principle of tax progression is endorsed by a large majority of citizens in each country, perceptions and desires of the distribution of taxes show more cross-national variation. Public dissatisfaction with the tax distribution is prevalent. Citizens tend to favour increased taxes on those with high incomes, while they desire reduced taxes on those with lower incomes. This pattern is particularly evident in the United States. Swedes and Britons on the other hand appear to be less displeased. " (p.126) "Disagreement over progressive taxation based on different positions within the social stratification system vary in magnitude between the nations, but do not vary in accordance with the presented suggestions. Further, data also suggest that social divisions over the principle of progressive taxation appear to be less significant compared to the distribution of taxes- a pattern which is most clearly marked in Sweden, and to a lesser extent, in Britain. Assumptions that divisions in Sweden, should foremost be structured by other factors, such as gender and sector of employment, rather than social class cannot be corroborated, as demands for augmented progressivity are mainly expressed as distinctive class conflicts. Likewise, expectations that class conflicts should be particularly salient in liberal welfare regimes are not met. In the United States the lack of structural cleavages is perhaps the most significant remark, and in Britain, while some income differences can be noticed, class-based conflicts cannot be regarded as particularly strong. Furthermore, sector and gender divisions seem to be of minor importance, with few exceptions. While there is some indications of divisions between public and private employees in Britain, gender differences appear solely in Sweden. However, as women are less sympathetic than men towards progressive taxations, expectations are not fulfilled. The impact of age differs between countries. Generation theories receive some empirical support as both in Sweden and teh United States older cohorts are more enthusiastic of the principle of progressive taxation than younger cohorts. ..Moreover, there is little support for the claim that links between political party preferences and attitudes to welfare policies tend to be lessened in post-industrial societies. In fact, the relationships between political choice and attitudes to progressive taxation is the only observed pattern that is consistent both between nations and attitudinal items." (p.127) |
| Corneo (2000) | | | individuals who claim to derive pecuniary advantages from a reduction of inequality are more likely to support political redistribution of income' (p10) 'In the US there is a statistically significant negative effect of an individual's income on the probability with which he is going to favor political redistribution. In Germany this is not the case. All in all estimation results show that preferences for political redistribution respond very strongly to the selfish pecuniary incentives put forward by standard economic theory' (p10) 'The PVE seems to be at work only in West Germany, and only in its direct version - not in Piketty's (1995) mobility version. This finding suggests that both in the US and East Germany political attitudes are mostly shaped by individualistic concern, whereas collective concerns affect the political attitudes of Westgermans' (p11) 'The lack of collective concerns in that country might be due to teh particular situation faced by Eastgermans at the beginning of the nineties' (ibid) As for SRE 'one expects income classes with a high prestige as compared to that of neigbouring classes to be less likely to favor political redistribution. In line with that prediction, in all country regressions the variable SRE displays a negative coefficient. However, the estimated coefficient is not statistically significant in the case of East Germany. With respect to the SRE, in the US and West Germany concerns for the own social standing appear to be a significant factor in shaping individual attitudes towards redistributive politics. On the contrary, the SRE does not pass the empirical test in the case of East Germany.' (p.11)Germans are found to be more supportive than US citizens. The findings show that 'individual preferences are also driven by social factors, which might sensibly alter the conclusions one should draw from the analysis of any particular redistributive issue' (p17). The paper also argues taht it confirms public choice theory in its focus on homo economicus. |
| Cusack et al. (2006) | | | "Contrary to popular beliefs, our analysis shows that preferences for redistirbution continue to be closely related to people's positions in the economy, and that governments respond very differently to economic shocks depending on the institutional and political context that they are embedded in" (p366) "what matters at the individual level is exposure to labour-market risks, especially as reflected in actual or threatened unemployment..the second contribution of this paper is to provide strong evidence for a tight linkage between redistributive preferences, partisan support and government policies..Third we show the continued importance of national institutions in mediating government responses to shocks" (ibid) "our results indicate that preferences for redistribution is very much in line with what we would expect from people's 'objective' economic positions' (p. 375) |
| Dancygier & Saunders, (2006) | | | Immigrants in both countries are more likely to support more liberal positions once all the control variables are in place. Immigrants are no more likely than natives to favour social spending or redistribution. No gap between natives and immigrants in Germany whilst immigrants in the UK have more conservative preferences on social spending whilst there are no significant differences in terms of preferences for redistribution. |
| Linos & West (2003) | | | "We critique and extend Svallfors' analysis, arguing that his overall conclusion of similarity in the structure of public opinion across welfare state regimes rests upon a problematic treatment of missing data and poor operationalization of the theoretical determinants of public opinion." (p.394)"We find that the cleavage between married and unmarried individuals does not exist in the decommodifying universalist regime, insider-outsider cleavages are more pronounced in specific-skill production regimes; while class cleavages play a more dominant role in liberal welfare states...We find that Americans and to lesser extent Australians are more likely than Germans and Norwegians to view their societies as mobile. In turn, in these societies, the views of individuals regarding government redistribution are also more likely to be linked to their beliefs about social mobility" (p.404) Thus, "..positions on redistribution are also shaped by subjective beliefs about the nature of society, especially in Australia and the USA" (p. 405). |
| Crepaz (2008) | | | "To extrapolate from the American experience with diversity and the welfare state to the European experience is problematic for a number of reasons. Today diversity impinges on European welfare states after they experienced a long period of nation and welfare state building relatively undisturbed by societal heterogeneity. The mostly centralized political institutions prevented a territorial fragmentation of social policy. Proportional representation initially secured pluralities or even majorities for social-democratic parties, cementing the influence of these parties while at the same time allowing broad access for those of different political persuasion to the political process. This has solidified expectations of the role of the state and nurtured large constituencies that are very supportive of the welfare state as opposed to the American experience. Crucially, during this long phase of undisturbed welfare state building some European nations, particularly the Nordic countries, built up a stock of interpersonal trust that functioned as a bulwark against prejudice vis-a-vis immigrants" (p. 251) "Overall, there is little evidence that immigration-induced diversity will lead to an 'Americanization' of the European welfare state. The conditions under which diversity unfolds in Europe are quite different from the American experience. Institutions, levels of trust, and expectations about the role of the state are significantly different. Nevertheless, prejudices against foreigners are strong in some European countries, and policymakers must take the concerns of local populations seriously rather than caving in to populist rhetoric. One of the most heartening findings throughout this project is that the more educated people are and the more contact they actually have with immigrants the more positive a view they have of them." (p.260) |
| Rehm (2007) | | | "First, individuals support redistribution because they are disadvantaged and hope to gain directly from income redistribution. This is the 'desire-for-equity' logic: redistribution is a means of achieving equity for those who are relatively poor. Income is the most important explanatory variable capturing this logic. Second, the 'redistribution-as-insurance' argument states that individuals are in favour of income redistribution because it insures them against the risks of income shocks, regardless of their income level...the chapter establishes that two factors measuring risk markedly influence redistributive preferences: skill specificity and occupational unemployment risk. Individuals with specific skills as well as individuals in occupations with high unemployment risks are disproportionately in favour of income redistribution. In contrast, the chapter does not find empirical support for the conjecture that risks brought by an individual's sectoral employment determines preferences concerning redistribution" (p.66) |
| Crepaz chapter 3 in Kymlicka & Banting, (2006) | | The analysis finds no evidence for the view that adopting MCPs erodes trust, solidarity or public support for the welfare state. (abstract) | |
| Mau & Burkhardt (2009) | | | Overall, an association between migration and welfare state solidarity but not strong, thus Europe is different from the USA. Attitudes are mediated by institutions, here measured as welfare regimes, unemployment rates and also GDP. |
| Senik et al. (2008) | | | ""Our main result is that for Europe as a whole, the association between the perceived presence of immigrants an and natives support for the welfare state is weak at best" (p.346) "We find that natives who hold both negative views [dislike immigrants and concerns about the economic consequences of immigration] react much more negatively to a given perceived share of immigrants than natives who hold either view...Finally, we find that natives who hold either of these negative views of immigrants tend to be less supportive of the welfare state independently of the perceived presence of immigrants" (abstract). |
| Andreβ & Heien (2001) | | | Find that all four regime types differ significantly in welfare state attitudes and confirm expectation of East Germany being most favourable followed by Norway then West Germany and then USA; BUT cross country differences have to explained with both overall influence of welfare regimes and the influence of regime specific economic interests and socialization experiences whilst compositional are of minor importance in this respect; but this finding underlines the importance of looking for more than aggregate level effects only; interaction effects showed the importance of class cleavage in the Unites states, the labour market cleavage in west Germany, the gender cleavage in Norway and the unique age effect in east Germany. In general support for anti-egalitarianism, support for the need principle, education and income emerge as the individual level attitude predictors with strongest cross-country variation. confirm patterns of regime- important that the authors differentiate between dimensions of attitudes towards the function, the means, the effects and the financing of welfare states and here they measure function |
| Jaeger (2006) | | | "The empirical analysis provides mixed support for the hypothesized relationship between welfare regimes and support for redistribution" (abstract) "consistent with what one would expect from the regime hypothesis, support for redistribution increases with total public expenditure and share of public expenditure on families delivered in the form of social services. However, the other regime indicators told a different story. The relative share of social services as a proportion of public social expenditure, benefit generosity, and family benefit expenditure were all negatively correlated with citizens' support for redistribution" (p.167) |
| Jaeger (2007) | | | "Left-right position is endogenous to support for redistribution and, second, consistent with theory, that a causal effect of left-right position on support for redistribution exists which is stronger than previously shown" (abstract) |
| Rehm (2009) | | | "The empirical results of this article clearly imply that individuals not only demand redistribution because they are poor but also because they are exposed to risks in the labour market" (p.872) |
| Finseraas (2008) | | | Anti-solidarity effect found, thus people care who they redistribute to, thus less willing to redistribute to immigrants however it also finds that immigration may be perceived as a risk of income loss and thus increases the preferred level of redistribution |
| Finseraas (2009) | | | "Inequality is positively associated with demand for redistribution, and that the median income person is sensitive to the level of inequality" (abstract) |

1. A discussion of year limitation can be found in the introductory chapter. [↑](#footnote-ref-1)
2. “Most meta-analyses take a two-step approach in that they first analyze the outcome of interest and calculate summary statistics for each individual study. In the second stage, these individual study statistics are combined to give an overall summary estimate” (CRD, 2009, p.67). [↑](#footnote-ref-2)