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REMINDER

ROLE OF EUROPEAN MOBILITY AND ITS IMPACTS
IN NARRATIVES, DEBATES AND EU REFORMS

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WORKING PAPER

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# Reciprocity in welfare institutions and normative attitudes in EU Member States

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## Abstract

This paper analyses how national welfare institutions and normative attitudes to welfare vary across EU/EFTA countries, and how national welfare institutions are linked to welfare attitudes, a long-standing question of comparative welfare state research. Our focus in this paper is on the concept of 'reciprocity' in welfare institutions and welfare attitudes, an important, and, we argue, under-researched issue that has been at the heart of recent debates about common EU policy-making, especially about whether and how to reform the current rules for free movement of workers in the EU. More specifically, the paper uses data from the European Social Survey (ESS) and a newly-constructed dataset of the characteristics of welfare institutions in 24 EU countries to address three questions: How do social protection programmes in EU member states differ with regard to reciprocity? How do normative attitudes to reciprocity in welfare programmes vary across EU member states? And finally, how are these normative attitudes linked to the actual design of welfare state programmes? We find substantial cross-country differences in social protection programmes in relation to the concept of reciprocity, considerable variation in normative attitudes to reciprocity, and that there is a clear correlation between the two. That national institutions matter for normative attitudes around core welfare state programmes may have significant consequences for views about free movement among European populations, with potentially important repercussions for the politics around free movement in the EU.

## 1. Introduction

Cross-country variations in socio-economic institutions such as national welfare states and labour market regulations can create considerable challenges for supranational policy-making on a wide range of economic and social policy issues. This is partly because national institutions provide an important part of the context within which domestic political actors develop their interests and policy positions. Different national institutions may therefore contribute to the development of different interests and interest-based policy preferences at the national level. Another, potentially equally important, reason is that particular national institutions are likely to be associated with specific values and ideas among the domestic population. For example, different welfare and national labour market institutions (formal institutions) can be expected to be associated with different values and normative principles (informal institutions) regarding the allocation of welfare benefits and the regulation of work. These different principles among the national populations will inevitably be characterised by varying degrees of (in)consistency with the values and ideas underlying any common, supranational policy framework, potentially contributing to cross-country disagreements about the design and implementation of supra-national policies.

In the context of the European Union, Scharpf (2010, p. 233) has argued that ' … EU member states differ greatly in the institutional structures and normative premises of their existing economic and social systems, and that the specific national configurations have high political salience and may, indeed, be considered as part of the constitutional identity of EU member states'. Scharpf suggests that what he calls European 'integration through law' has a liberalising and deregulatory impact on the socio-economic regimes of European Union (EU) member states, which makes it more compatible with liberal market economies than with coordinated market economies.

Cross-country differences in welfare state institutions and principles are likely to be particularly important – and potentially problematic – for supra-national policies on migration and migrants' access to welfare benefits. In their analysis of the potential causes of the recent political conflicts about free movement in the European Union, Ruhs and Palme (2018) explain how different welfare institutions can come into conflict with common rules for the free movement of EU workers and their access to welfare benefits in the EU.

Under the current rules, EU citizens can move and take up employment in any other EU country *and* – as long as they are 'workers' – enjoy full and equal access to the host country's welfare state benefits. In recent years, some EU countries have argued for more restricted access for EU workers to welfare benefits, while many others have opposed these calls for new restrictions.

Ruhs and Palme argue that the key mechanism through which cross-country variations in welfare states can contribute to disagreements between EU member states about free movement relates to the different values and normative attitudes associated with different welfare states (e.g. welfare benefits should be provided based on the principle of need, prior contribution, or universal access) and the 'reciprocity norm' that underlies the EU's common policies on free movement (i.e. provide migrants workers with national welfare benefits only after they have contributed). They suggest that countries with social protection institutions whose associated values and normative attitudes are inconsistent with the reciprocity norm underlying supra-national policies are more likely to produce political pressures to reform the common policies than countries with social protection institutions whose associated principles are more consistent with the common reciprocity norm.

In addition to this mismatch between the normative principles underlying supra-national policies (such as free movement and associated EU regulations on welfare rights for EU workers) and some national welfare institutions, it may also be the case that free movement, and immigration more generally, raises more concerns in some social protection systems than in others. For instance, in systems based on strong reciprocity, where benefit claimants 'earn' their rights by paying contributions and get benefits in some proportion to what they pay in, it is likely that immigration is less contentious, simply because migrants also also have earned their rights (cf. Reeskens and Oorschot 2012). In countries where there is less reciprocity we can expect more tensions because migrants do not 'earn' their rights – or at least may not be perceived to be doing so – in the same explicit way (Ruhs 2017).

Ruhs and Palme (2018) also discuss another welfare policy area characterised by important cross-national differences, namely family support, where tensions around free movement might arise for a reason that is slightly different from, but still linked to, the idea of reciprocity. EU regulations on family benefits for EU workers are built on the so-called 'Male-breadwinner model', wherein derived rights for family members are based on the contributions made by the breadwinner. But many EU/EFTA countries in the North and in the South of Europe have either a 'Dual–earner model', wherein benefits are considered individual rights afforded to all residents or to the individual contributor, or a more 'Market-based model', which is guided by other principles for benefit provision. Again, in countries where the fundamental principles associated with national family policies clash with those underlying EU regulations about family benefits for EU workers, we can expect tensions and domestic political pressure to reform the common policies in this area.

Existing theoretical research thus points to the importance of studying cross-country variations in formal and informal welfare institutions in order to help explain tensions between countries that are part of a common supra-national policy framework, and to help design common policies that are politically sustainable over time. As explained above, in the context of ongoing debates about free movement and access to welfare rights for EU workers in the European Union, cross-country variations regarding the relative importance of reciprocity in welfare institutions and welfare attitudes are of central importance.

With the aim of enhancing our understanding of the conditions for common policies in the EU, this paper analyses the variations and institutional correlates of normative attitudes to welfare, with a focus on 'reciprocity', across a large number of EU/EFTA countries. More specifically, the paper uses data from the European Social Survey (ESS) and a newly-constructed dataset of the characteristics of welfare institutions in 24 EU countries to address three questions: How do social protection programmes in EU member states differ with regard to reciprocity? How do normative attitudes to reciprocity in welfare programmes vary across EU member states? And, how are these normative attitudes linked to the actual design of welfare state programmes? Our analysis of these questions contributes to the general research literature on the role of institutions in shaping normative attitudes around the welfare state, and to research and policy debates about the role of cross-country differences in formal and informal institutions in generating political conflicts between EU Member States about free movement and other common EU policies.

The paper is structured as follows. We begin, in section 2, with a theoretical discussion of why we would expect a link between welfare attitudes and institutions. We explain what we mean by reciprocity, and provide hypotheses about the links between 'institutional reciprocity' (i.e. reciprocity as a characteristic of the institutional design) and 'normative reciprocity' (i.e. public preferences for reciprocity as a principle of benefit provision). Section 3 explains our methods and data for calculating an institutional reciprocity index for 24 EU Member States, and provides a descriptive discussion of the results. The following section does the same with regard to reciprocity in normative attitudes. Section 5 then analyses the relationship between institutional and normative reciprocity – the core question of interest in this paper. Section 6 presents the conclusions of our analysis.

## 2. Theorising links between welfare attitudes and institutions

The relationship between welfare state institutions and normative attitudes about how the welfare state ought to be organized is of central importance to some of the most fundamental issues in comparative welfare state research, ranging from the driving forces behind the prevailing differences among modern welfare states to the consequences of these institutional differences for a number of social and economic outcomes.

Our understanding of the relationship between formal institutions and normative attitudes is informed by a research tradition wherein formal institutions are not reduced to mechanical expressions of the preferences of a particular population, but themselves have effects on the values and attitudes of a population. For example, formal democratic institutions help to foster democratic values among the citizenry (e.g. Lepsius 2017). In a similar vein, welfare state institutions are expected to foster support for the norms and principles that underlie the provisioning of benefits and services (e.g. Korpi 1980; Rothstein 1998).

The question of how welfare state preferences are linked to welfare state institutions has been the subject of a large number of empirical studies and investigations, including analyses of very different norms, values, and attitudes. This research literature has generated some clear results related to broad features of welfare states. For example, more encompassing welfare states tend to generate stronger support than more targeted ones (e.g. Svallfors 2012). There is, however, considerable frustration among researchers in the field about the failure to generate consistent results over a broader range of items and about a tendency to conclude that relationships are 'complex' when it comes to institutional characteristics and different attitudes (Svallfors 2012; Zimmerman et al 2018). Although intuitively plausible, relationships between institutions (often conceptualized in regime terms) and attitudes have proven to be hard to corroborate in empirical research, and the existing evidence is piece-meal and ambiguous. For example, Meier Jaeger (2006) finds that support for redistribution increases with the size of social expenditure and the share of such expenditure that is spent on families, but that a host of other welfare regime variables have no significant effect. Brady and Bostic (2015) find low income targeting to be the only country-level variable that has a significant (negative) effect on support for redistribution. Brooks and Manza (2006) find a link between mass policy preferences and welfare regimes, but have been criticised for their statistical model (Breznau 2015).

Our paper contributes new and more fine grained theoretical reasoning and empirical data to an important ongoing debate regarding the relationship between institutions and welfare attitudes. We combine a regime analysis with a 'variable approach' and, in contrast to most existing research, our analysis is conducted both at the aggregate system level, and in a disaggregated way, by investigating specific programme areas (including unemployment insurance, pensions, and family policy). In short, we argue that we can gain new insights by asking more precise questions about the empirical data, and by measuring both the dependent variable (normative welfare attitudes) and independent variables (including welfare institutions) in a precise and rigorous way.

In the large and growing field of comparative studies about welfare states and attitudes of different kinds, Reeskens and Oorshot's (2013) analysis of the determinants of public preferences for different principles of redistribution ('equity', 'equality', or 'need') stands out as particularly relevant to our analysis. They find, among other things, that institutional features of the national social protection systems impact upon which principle of redistribution people in different countries prefer, but also that such effects differ between pensions and unemployment benefits. Our approach and analysis differ from those in Reeskens and Oorschot (2013) in at least three ways. First of all, we are interested in the reciprocity of the social protection systems, which directs attention to the principles for provision of benefits rather than the principles of redistribution (equity, need and equality). This has led us, secondly, to define the dependent variables differently, putting the degree of reciprocity at the centre. Thirdly, as we explain below, we conceptualize and operationalize the variations between welfare states in a different way from Reeskens and Oorschot. We have a strict focus on the reciprocity dimension of these institutions.

What do we mean by reciprocity? While it is sometimes understood in terms of how the welfare state is financed, or how benefits are designed, we argue that reprocity has to be understood in terms of *both* the financing and design of benefits. This implies that we see a difference between 'reciprocity' and 'contributiveness', the latter referring to the extent to which a welfare system is funded out of social security contributions instead of taxes. While the financing aspect is important and should be part of the study of reciprocity, we also need to consider what we call the 'earnings-relatedness' on the benefit side, i.e. the extent to which benefits replace previous earnings. So, in contrast to contributiveness, reciprocity is not only about whether access to benefits requires a prior contribution, but also about the value of the benefit received in relation to the previous contributions and earnings.

When it comes to family support, we argue that, in order identify the tensions in relation to free movement, the analysis of the concept of reciprocity has to be elaborated further. It is important to recognise that reciprocity is a feature of both the Male-breadwinner model and the Dual-earner model of family policy – but it is achieved and 'instituted' in different ways across these two models. In the Male-breadwinner model, reciprocity is established through the model's emphasis on family benefits as a 'derived right' dependent upon the breadwinner's contribution. In contrast, in the Dual-earner model the link between contributions and benefits is on the individual level. It is more direct than under the Male-breadwinner model, as it involves work requirements for the individual benefit claimant. For our purpose, the distinction between the different reciprocity logics of the Male-breadwinner and the Dual-earner models is important, and should be seen in relation to normative attitudes regarding women's access to the labour market. The focus of the empirical analysis is therefore on the link between the dual-earner orientation of the family policy and the support for female labour force participation.

Our theoretical reasoning thus results in the following set of hypotheses about the links between public preferences for reciprocity in welfare policies and the actual reciprocity built into welfare institutions:

H1: The more reciprocity in the overall social insurance system, the larger the proportion of the population that will share the view that benefits should be based on the reciprocity norm.

H2: The more reciprocity in the pension system, the larger the proportion of the population that will share the view that pensions should be higher based on the reciprocity norm.

H3: The more reciprocity in the system of unemployment insurance, the larger the proportion of the population that will share the view that unemployment benefits should be based on the reciprocity norm.

H4: The stronger the reliance on the Dual-earner model in family policy, the larger the proportion of the population that will support the dual-earner norm (women's equal access to the labour market).

## 3. European welfare states: Variations in institutional reciprocity

### *3.1 Data*

The institutional data used in this paper is developed based on a database presented and discussed in an earlier working paper for the REMINDER project (Palme and Ruhs 2018). In this earlier working paper we introduced a new database (the Social Protection in Europe Database, SPEUDA) and laid the ground for an analysis of both regime categories and a set of underlying variables that capture differences in welfare state and labour market institutions across countries and over time. In another working paper (Österman, Palme and Ruhs 2018), we applied a categorical approach to cross-national welfare state variations that involved the classification of the EU/EFTA countries into different social policy regimes. We will make some use of the regime approach in this paper. However, given our focus on the specific aspect of reciprocity, a regime approach alone is not satisfactory. This is because aggregate welfare regimes are defined by many different aspects of their social policy programmes that go beyond the degree of reciprocity in benefit provision. Most of our core analysis in this paper thus relies on a 'variable approach'. This facilitates clearer programme-specific measurements of institutional differences, and analysis of correlations with the survey data on normative attitudes which also contain items that are programme-specific. Still, for descriptive purposes it is helpful to start the discussion of the reciprocity dimension in relation to the regime typology.

### *3.2. Regimes*

The classification of countries that we have used for the earlier working paper (Österman, Palme and Ruhs 2018) is primarily based on social insurance programmes. We have, however, observed similar variations in how countries organize their family policies, health care systems, and labour markets. That there is no established way of classifying social protection systems covering all EU/EFTA countries represents a big challenge. In particular, classifying the Eastern and Southern European countries has been demanding. In the exploration of the fiscal impacts of intra-EU/EFTA migration (Österman, Palme and Ruhs 2018) we eventually distinguished between five categories of welfare state regimes: Basic security, Continental corporatist, Mediterranean corporatist, Universal, and State insurance.

The Basic security regime is strongly influenced by the Beveridge approach, insofar as it typically provides contributory flat-rate benefits, which leaves a big role for market solutions on top of the basic provisions. The Basic security regime is also characterised by a strong emphasis on means-tested benefits (not least for families with children), partly to compensate for low social insurance benefits. While social insurance is typically financed via contributions, the reliance on flat-rate benefits adds up to a weak reciprocity of basic security oriented systems. Family benefits are otherwise modest by international standards, and this has led some observers to label it a Market-model of family policy (Korpi 2000). The Basic security regime includes Ireland, Malta, and the UK.

The Continental corporatist regime follows the Bismarckian tradition of providing statutory social protection separately for different corporations on the labour market. It is a tripartite system, where employers and insured persons as well as the state are involved in both the financing and administration of the social protection system, and where the state plays a junior role in terms of both financing and administration, which means that general taxation is of modest importance. Health care typically follows the insurance principle within an integrated system for the provision of sickness benefits in cash and in kind. Since funding relies heavily on social security contributions, and benefits are strongly earnings-related, the reciprocity in this model is expected to be strong. Family policy in this regime has traditionally followed the Male-breadwinner model, with a strong reliance on derived rights for family members, which adds emphasis to this kind of reciprocity. Public social services in terms of childcare and care for the elderly are modest, which means that these services are typically provided by the family. The Continental corporatist regime includes Austria, Belgium, France, Germany, The Netherlands and Switzerland.

The Mediterranean corporatist model is a ‘light’ version of the Continental corporatist regime. It shares the Continental regime's statutory corporatist organisation of the core social insurance programs. While there is a strong reliance on social security contributions in this regime, and social insurance benefits are typically earnings-related, the universal health care system puts a burden on taxation which in principle dilutes the reciprocity of this system compared with the Continental version. Family policy provisions are modest in comparison with the Continental model. The Mediterranean corporatist regime includes Cyprus, Greece, Spain, Italy and Portugal.

The Universal regime combines elements from the Beveridgean and Bismarckian regimes within a universal framework. Hence, flat-rate benefits for those outside employment are mixed with earnings-related social insurance provisions. Thus, reciprocity is lower than in the two corporatist systems, but higher than in the basic security model. Family benefits are provided both in cash and in kind to support dual-earner households where caring responsibilities are combined with market work. Earnings-related social insurance is typically funded by employers' social security contributions. The Universal regime includes Denmark, Finland, Iceland, Norway and Sweden.

The State insurance regime relies on earnings-related social insurance programs within a universal framework. Basic benefits in the State insurance regime are much weaker than in the Universal regime. This implies a strong reciprocity, on par with the Continental corporatist model. Family benefits among the State insurance countries tend to be less generous than in the Universal and Continental corporatist regimes but vary considerably within the regime. The State insurance regime incorporates Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia.

### *3.2. Institutional variables*

We construct and use two types of indicators to capture the degree of reciprocity in social insurance systems. The first relates to the financing side of the system, and the second to the benefit side. We describe briefly how we constructed our indices below.

On the financing side, we have chosen to capture reciprocity by using the proportion of financing that formally comes from the insured person, with the other two contributors being the employers and the state. We have focused on the formal regulations, and have not measured the actual flows of contributions from these three sources. The reason for not including the employer's contribution is based on our understanding of reciprocity in terms of a visible connection between benefits and contributions. Arguably, in many cases employers' contributions are seen as a 'tax' that becomes part of the general revenue. The financing is measured for the following three social insurance programs separately: pensions, unemployment insurance, and sickness cash benefits. With few exceptions, work accident insurance programs are exclusively funded by employers' contributions, which is why we did not include them in our analysis. We first calculated three variables expressing the proportion of financing by the insured person for pensions, sickness cash benefits, and unemployment insurance, respectively. We then calculated a *total financing index* as an average of the three programme-specific financing variables (pensions, sickness, and unemployment).

On the benefit side, we use two different indicators for the following four social insurance programs: pensions, unemployment insurance, sickness insurance, and work accident insurance. The first indicator is the net replacement rate for what we have labelled a 'full worker', i.e. someone who fulfills all contribution requirements and earns an average wage. The net replacement rate refers to the proportion of a wage that that is replaced by a social insurance benefit (benefits and wages calculated net of taxes.) The second indicator is the replacement rate for the maximum benefits possible as a proportion of the average wage.

We have applied a ceiling of 150 percent of an average wage in order to avoid problems arising from outliers and influential cases caused by the fact that a few countries have very high ceilings for benefit purposes (or no ceiling at all). We have also created different types of indices. The first type of index is created by adding the two replacement variables by program and dividing by 2. The second kind of index is the *total benefits index*, created by adding the four program indices (pensions, unemployment, sickness, work accident) and dividing by 4.

We then create a *total reciprocity index*, calculated as an average of the *total benefits index* and the *total financing index*. We have used the same procedure to calculate separate reciprocity indices for pensions and unemployment insurance.

Following Ferrarini (2006) we calculate a *dual-earner indicator* of family provisions by using the benefit level of parental leave benefits for the first year after the birth of the child. Since we lack good earnings data for the new member states we measure the generosity of the benefits as a proportion of GDP per capita (as a kind of approximation of a (wage) replacement rate, which is the most common way of expressing benefit generosity in this field of research.

### *3.3. Institutional reciprocity in national welfare institutions across EU/EFTA countries*

Taken together, our institutional data and the ESS allow us to include 24 EU/EFTA countries in our analysis: Belgium (BE), Bulgaria (BG), Switzerland (CH), Cyprus (CY), the Czech Republic (CZ), Germany (DE), Denmark (DK), Estonia (EE), Spain (ES), Finland (FI), France (FR), the United Kingdom (GB), Greece (GR) , Hungary (HU), Ireland (IE), Latvia (LV), Netherlands (NL), Norway (NO), Poland (PL), Portugal (PT), Romania (RO), Sweden (SE), Slovenia (SI), Slovakia (SK).

Figure 1 displays the country-scores on the institutional reciprocity index, for the year 2005. A larger number indicates a greater degree of reciprocity. As our main aim is to link institutions to normative attitudes, we focus our analysis of 'institutional reciprocity' on welfare institutions in the 24 countries for which we also have data on normative attitudes from the European Social Survey (ESS). ESS data on the normative welfare attitudes of interest to us are only available for the year 2008, so our institutional reciprocity index focuses on the years 2005 and 2006, to create a short lag between the two variables.

Some countries score high on the financing dimension but not on the benefit dimension, whereas other countries score high on the benefit dimension but not on the financing dimension. There is no perfect correlation between the regimes and the total reciprocity index either – but there are, nevertheless, some notable commonalities. As expected, the basic security countries rank the lowest in the reciprocity index. The countries in the Universal regime also rank fairly low, especially Denmark, whereas Finland shows high institutional reciprocity. While some of the State insurance countries rank at the top, there is a wide variation among these countries. The variation is also considerable among the Mediterranean corporatist countries. The Continental corporatist countries are, on average, ranked higher in terms of institutional reciprocity than the other groups of countries, which is what we would expect from their reliance on earnings-related benefits and social security contributions.

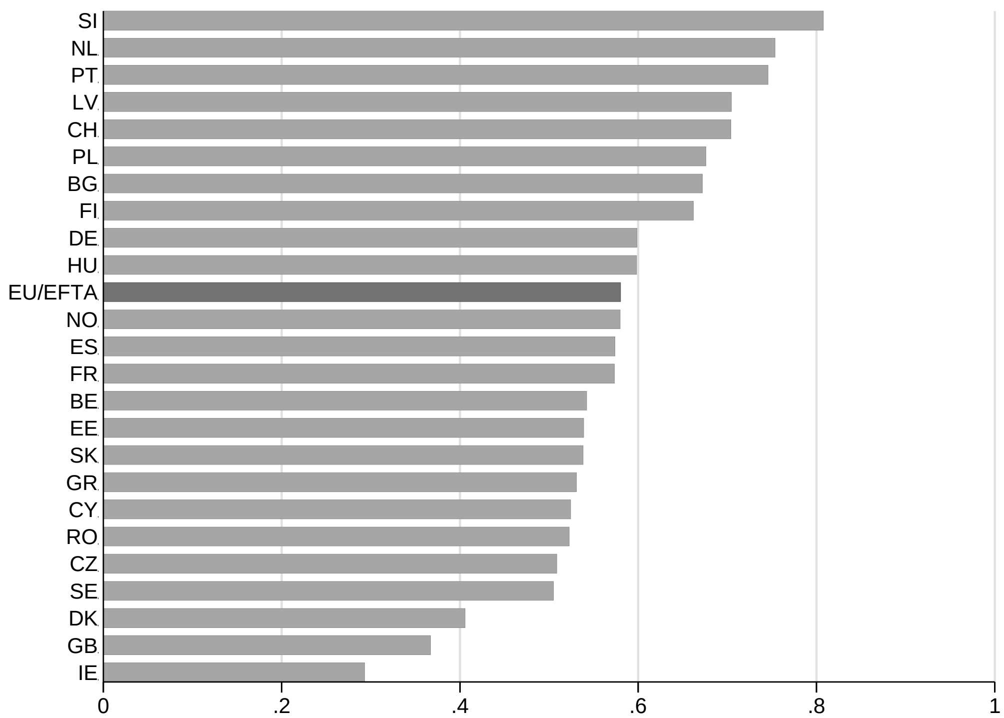


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Figure 1. Institutional reciprocity in 24 EU and EFTA countries, 2005

Figure 2 shows the reciprocity index for the pension system. A number of the commonalities are the same as with the total reciprocity index. The Basic security countries score low, and the widest variation is found among the State insurance countries. The Universal countries are in the bottom half, with Finland scoring higher than the other countries. The countries in the Continental corporatist regime score moderately high and, on average, slightly lower than the Mediterranean corporatist countries.

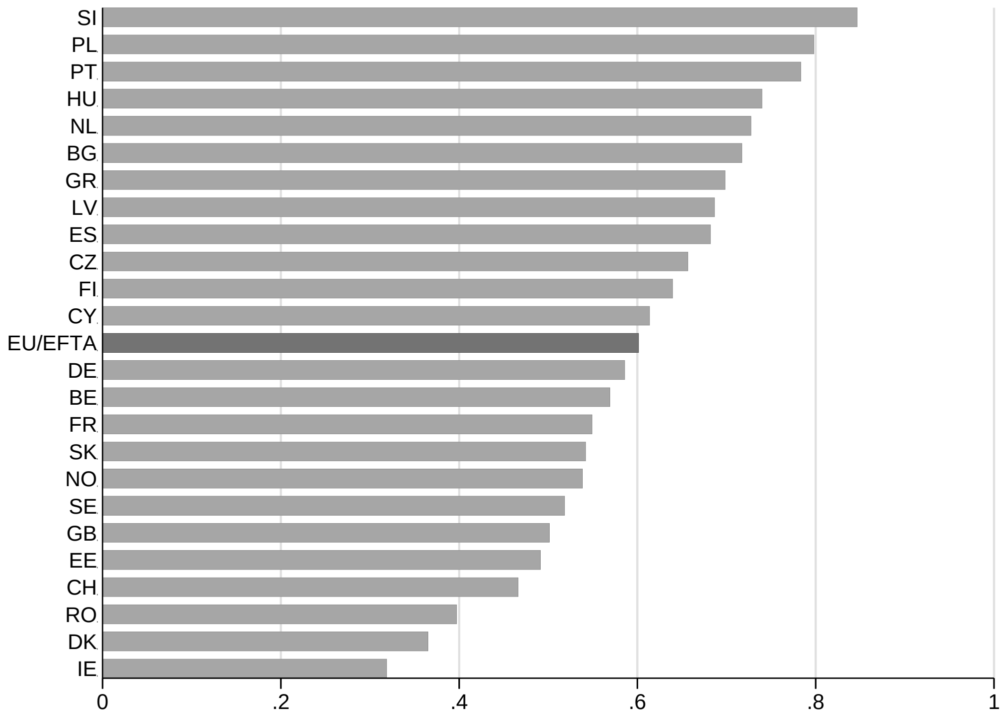


Figure 2. Reciprocity index for pensions in 24 EU and EFTA countries, 2005



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Figure 3 shows the reciprocity index for unemployment insurance, and demonstrates that many countries rank very differently for this provision compared to pensions (c.f. Figure 2). Two features are similar, though. One is the large variation within the State insurance regime, and the other is that Basic security countries score low. The Continental corporatist countries receive the highest scores on average. Both the Mediterranean corporatist and the State insurance countries score, on average, lower on unemployment insurance than on pensions. The Universal regime countries score slightly higher for unemployment insurance than for pensions.

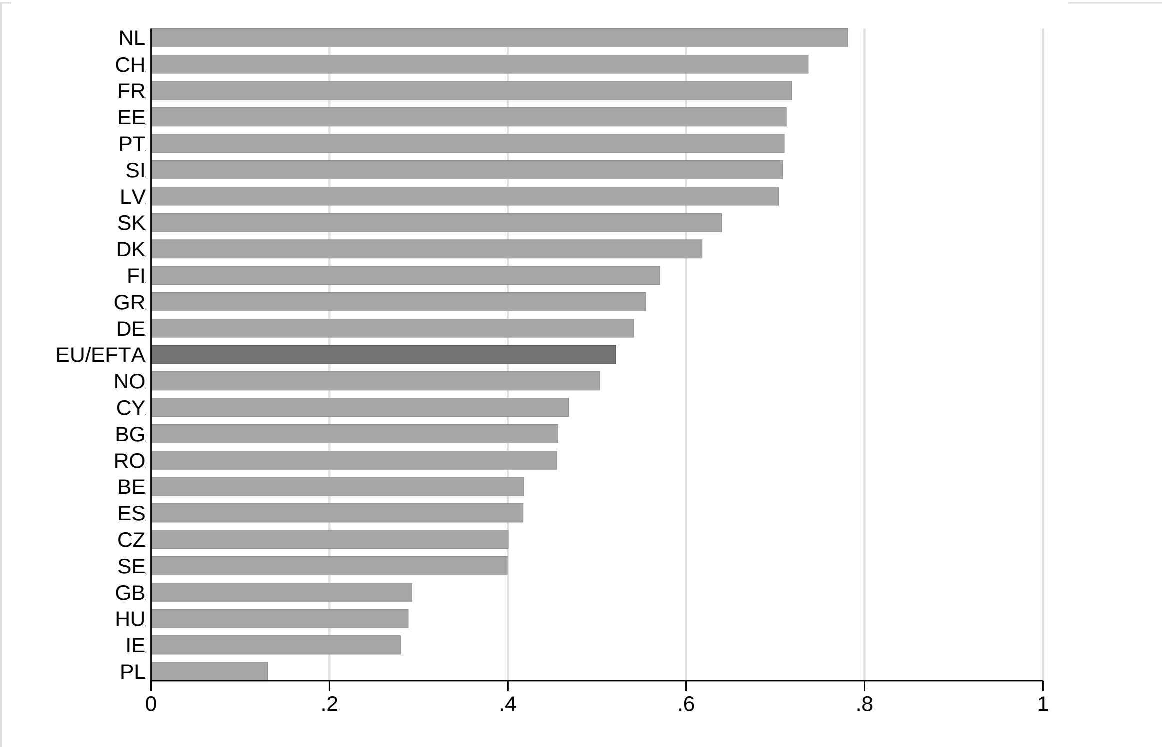


Figure 3. Reciprocity index for unemployment insurance in 24 EU and EFTA countries, 2005



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The rank ordering of countries based on the dual-earner indicator displayed in Figure 4 reflects reasonably well what we would expect from the description of the family policy dimensions of the different regimes. Hence, the countries in the Universal regime all score high on the dual-earner indicatordual-earner. Countries in the Basic security regime that have a more market-oriented view of providing for a family score low, which is what we would expect, but the differences are small compared to the countries in the two corporatist regimes. The countries in the State insurance regime again show remarkable variation, but most of the countries end up in the upper half of the distribution. Overall, this 'variable approach' to the comparative analysis of welfare institutions captures an important variation that would not have been identified by a regime approach.

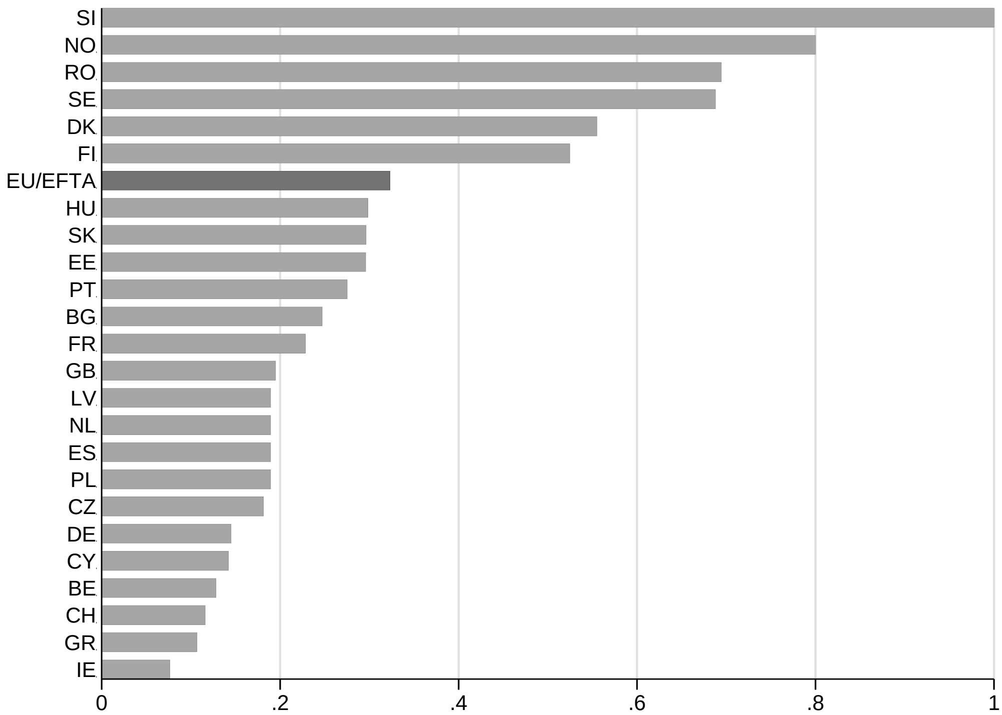


Figure 4. Dual-earner indicator in 24 EU and EFTA countries, 2006.

## 4. Normative attitudes to reciprocity as a welfare principle in the EU

To measure public attitudes towards the principle of reciprocity and the dual-earner norm, we rely on survey data from the welfare attitudes module of the 2008 European Social Survey (ESS). The ESS is a high-quality biannual survey of public attitudes in European countries. The selection of 24 countries represented in the 2008 ESS round provides good coverage of different social policy regimes and includes recent as well as older EU member states.

We measure public support for reciprocity in the social insurance system by means of two ESS items that were devised to capture respondents' attitudes towards three competing principles of redistribution: equity/reciprocity, equality, and need. The questions posed concern pensions and unemployment benefits respectively, and read as follows:

> Some people say that higher earners should get larger old age pensions / unemployment benefits because they have paid in more. Others say that lower earners should get larger old age pensions / unemployment benefits because their needs are greater. Which of the three statements on this card comes closest to your view?

Responses were given on a scale: 1, "Higher earners should get more in benefit"; 2, "High and low earners should get the same amount in benefit"; 3, "Lower earners should get more in benefit"; and 4, "None of these". The first of these response options reflects the principle of reciprocity, i.e. the idea that there should be a clear link between contributions and benefits in the social insurance system. We thus contructed an index variable that reflects the average proportion of the respondents that selected the first response option across the two items. Higher values on the index variable indicate higher support for reciprocity. Although the reliability score for this index is somewhat low (alpha=0.65), we have good theoretical reasons to assume that the two items (on pensions and unemployment benefits) can be combined and serve as a valid measure of the latent variable of interest to us.[1] They

[1] The conventional view is that alpha should be above 0.70 for an index variable, and that values below 0.60 suggest that the index is a poor measure of the latent variable in question. However, empirical correlation is not the only relevant factor to consider when one constructs an index. There may be good theoretical reasons to combine items tht are weakly correlated empirically into an index. Measuring a composite latent variable (such as the dual-earner norm or democracy, for example) often requires theoretically informed choices about what indicators to include and not to include.

are identically-worded (save for the reference to pensions and unemployment benefits respectively), and both were directly intended to measure attitudes to reciprocity in the social insurance system.

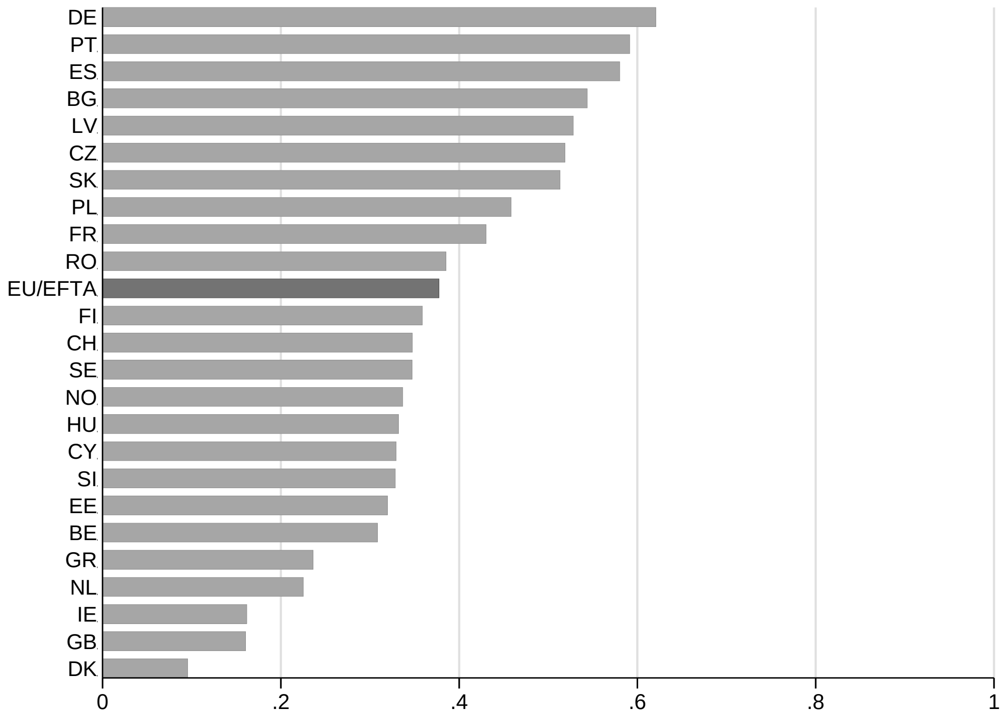


Figure 5. Support for the principle of reciprocity in 24 EU and EFTA countries, 2008

Note: Reciprocity support index. The figure shows the average proportion of respondents in each country that prefer the reciprocity principle as the basis for pensions and unemployment insurance, i.e. higher earners should get more in benefit. Design weights (dweight) were applied in the calculation of country means and the between-country mean.
Source: European Social Survey 2008

Figure 5 provides an overview of the variation in the reciprocity support index across countries. While support for the principle of reciprocity is strongest in the Continental corporatist country of Germany and two Mediterranian corporatist countries, Portugal and Spain, several other countries in these two regime types are less positively oriented towards reciprocity than the EU/EFTA average. Most but not all of the Central and Eastern European countries that constitute the State insurance regime are more positively disposed towards reciprocity than the EU/EFTA average. The two countries of the Basic security regime, Ireland and the UK, join Denmark in the group of least positive countries. Like Denmark, Finland, Norway and Sweden (also in the Universal regime), are less positive about reciprocity than the average EU/EFTA country.

Going into more detail, Figures 6 and 7 display the variation in the two original variables (pensions and unemployment benefits) that we used to contruct the reciprocity support index. While the EU/EFTA countries are distributed fairly similary across these two variables, there is somewhat greater variation in the pensions variable than in the unemployment variable.

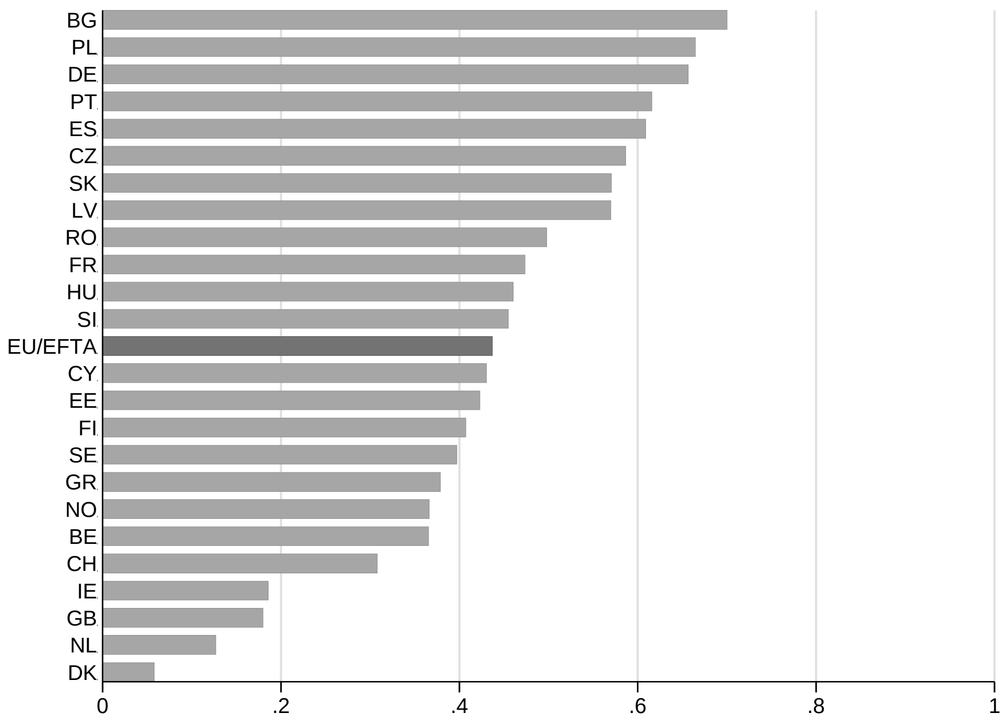


Figure 6. Support for the principle of reciprocity in pensions in 24 EU and EFTA countries, 2008

Note: The figure shows the average proportion of respondents in each country that prefer the reciprocity principle as the basis for pensions, i.e. higher earners should get more in benefit. Design weights (dweight) were applied in the calculation of country means and the between-country mean. Source: European Social Survey 2008

It is worth noting that the average support for reciprocity in pensions is quite a bit stronger than for reciprocity in unemployment benefits. As observed by Reeskens and Oorshot (2013), a possible mechanism behind this pattern might be that preferences for different principles of redistribution are context sensitive. They argue that the redistributive function of pensions may be judged differently by the public than that of unemployment benefits, because the former deals with a forseeable social risk (ageing). The pension system requires individuals to allocate their income wisely across the life cycle. Unemployment, by contrast, is a less predictable and less manageable social risk. This could be the reason, Reeskens and Oorshot argue,  why there is greater public support for redistributive justice (equality) across individuals in the case of unemployment benefits and hence, less support for reciprocity in unemployment benefits than in pensions.

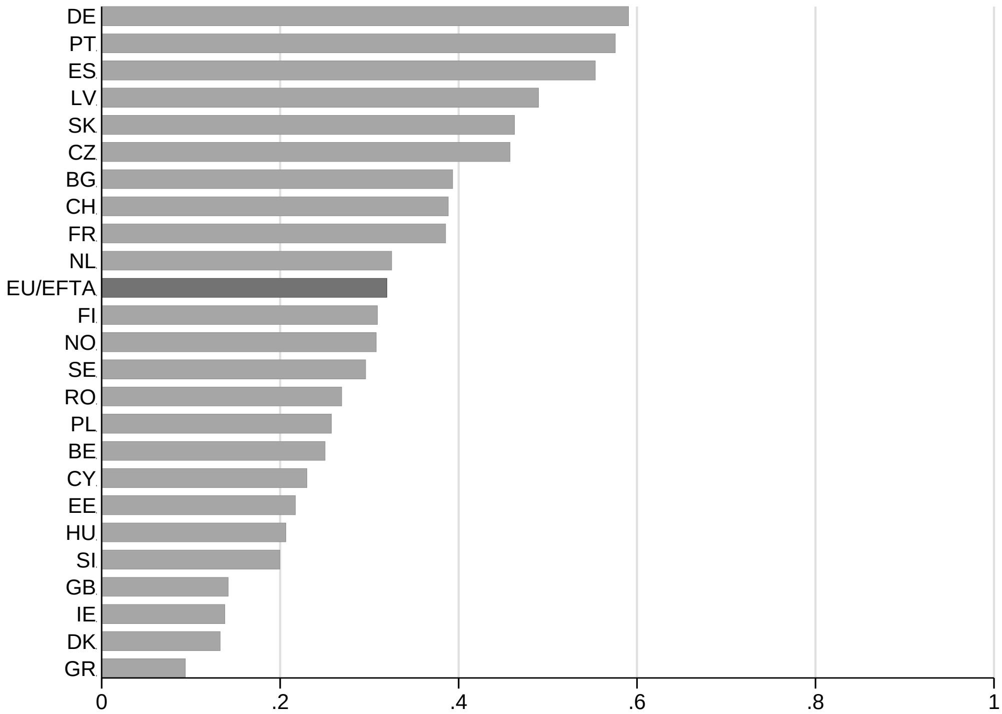


Figure 7. Support for the principle of reciprocity in unemployment benefits in 24 EU and EFTA countries, 2008

Note: Design weights (dweight) were applied in the calculation of country means and the between-country mean.
Source: European Social Survey 2008

Turning to our second dependent variable, support for the dual-earner norm, we selected two ESS items for analysis. Both were originally intended to capture respondents' attitudes to female labour participation, which is the most central feature of the dual-earner norm:

> Please say to what extent you agree or disagree with each of the following statements.
>
> - When jobs are scarce, men should have more right to a job than women.
> - A woman should be prepared to cut down on her paid work for the sake of her family.



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Responses were given on the scale: 1, “Agree strongly”; 2, “Agree”; 3, “Neither agree nor disagree”; 4, “Disagree”; 5, “Disagree strongly.” We transformed this range into a 0-1 scale to render it comparable to the other variables analysed in the paper. The two items are then combined into an index, based on their mean value for each observation (dual-earner norm index). Higher values on the dual-earner norm index indicate higher support. Again, while the reliability measure for the index is on the low side (alpha=0.63), we have strong theoretical reasons for believing that the two selected variables serve as a valid proxy for the latent variable of interest to us: support for the dual-earner norm. Before settling on this index, we evaluated two additional ESS items that solicit attitudes to public and affordable childcare respectively. The child care items turned out to be weakly correlated, both to one another and to the two items on female labour participation, and we therefore opted to exclude them from our analysis.

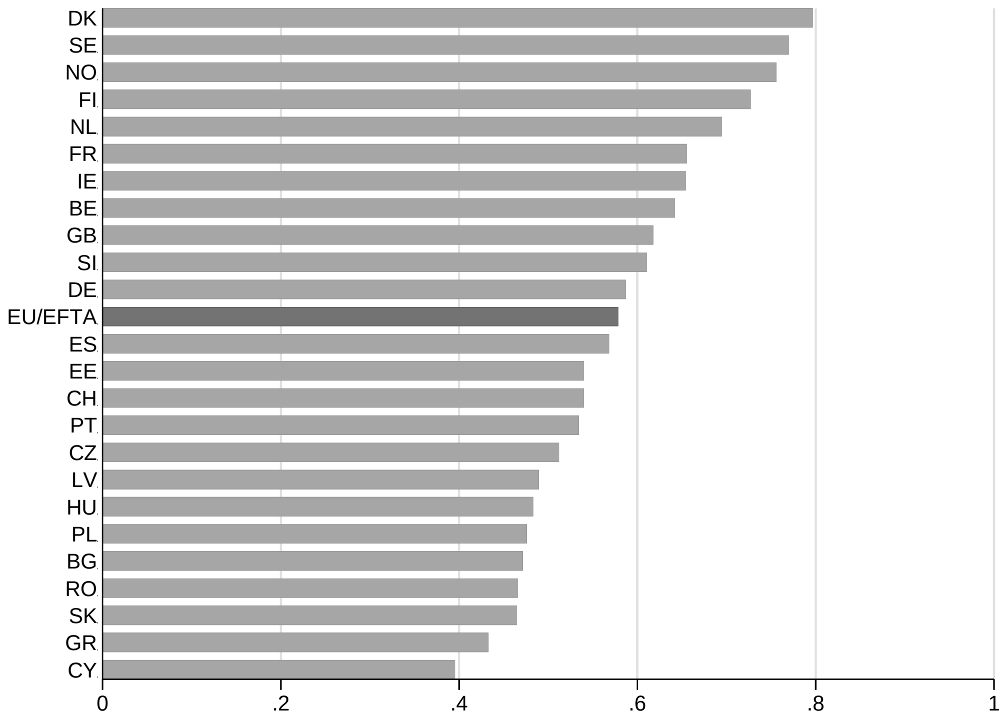


Figure 8. Support for the dual-earner norm in 24 EU and EFTA countries, 2008

Note: Dual-earner norm index. The figure shows the mean support for female labour participation in each country, across two survey items from the ESS. Design weights (dweight) were applied in the calculation of country means and the between-country mean.
Source: European Social Survey 2008

Figure 8 shows the overall pattern of support for the dual-earner norm (in the EU/EFTA countries. Female labour participation, it appears, is somewhat less divisive topic than reciprocity. Moreover, attitudes to the dual-earner norm align somewhat better with the five welfare regimes defined in Österman et al. (2018).

The Universal regime – Denmark, Finland Norway and Sweden – top the list of countries with strong support for the dual-earner norm. The Mediterranean corporatist countries of Greece and Cyprus display the least support, followed by all but one (Slovenia) of the countries in the State insurance regime. All countries in the Continental corporatist and Basic security regimes are more positive regarding the dual-earner norm than the average European country, yet less positive than the four countries in the Universal regime.

## 5. Links between normative attitudes and welfare institutions

Our main theoretical expectations are that there will be greater public support for the idea of reciprocity in countries that have put this principle into practice in their social insurance systems (H1), and that this would apply also for specific programmes such as pensions (H2) and unemployment insurance (H3). Moreover, we expect public support for female participation in the labour market to be higher in countries where public policy follows a Dual-earner model (H4). In other words, we expect a close association between institutions and attitudes.

Given the restrictions that the availability of data puts on us, we have to confine the empirical test of our hypotheses to cross-sectional data. The institutional data (that we constructed) is from 2005 (or 2006) and the data on normative attitudes (from ESS) relate to 2008. Given our underlying interest in the effects of institutional characteristics on normative attitudes, we will in addition to the scatterplots also present the results from a set of basic regression analyses that will serve as a first test of our hypotheses. It goes without saying that we, at this stage of the analysis, do not make any causal claims about observed correlations.

Given the small number of observations in our dataset, we strive to include a limited number of control variables. We have selected three variables that may influence both welfare institutions and welfare attitudes. However, variables that are primarily consequences, rather than causes, of welfare institutions have not been included in our analysis, as this might lead to incorrect estimates of the total “effect” of institutions on attitudes.

First, since the economic wealth of a country is expected to influence its options in terms of welfare state design as well as individuals’ attitudes to the welfare state, we control for GDP per capita. To this end, we use data from the World Development Indicators (World Bank, 2018). Second, the relationship between ethnic fractionalization, welfare state design, and welfare attitudes is a salient topic in prior research. For example, Alesina and Glaeser (2003) find ethnic fractionalization to be a key determinant of welfare attitudes and of levels of redistribution alike. We thus include a measure of ethnic fractionalization developed by Alesina and Glaeser among our control variables. This fractionalization measure reflects the probability that two randomly selected individuals in a given country do not share the same ethnicity. Higher values correspond to higher degrees of ethnic fractionalization. Third, a growing number of studies suggest that the quality of government institutions condition welfare state design and individuals’ willingness to support redistribution (see e.g. Rothstein et al. 2012; Svallfors 2013). This motivates us to include the ICRG Indicator of Quality of Government (QoG) as our final control variable. Higher values on the QoG index indicate a higher quality of government in terms of three variables: ‘Corruption’, ‘Law and Order’, and ‘Bureaucracy Quality’. The ethnic fractionalization and QoG indices were both taken from the Quality of Government Basic Dataset (Dahlberg et al. 2008).

### *5.1 Institutional design and support for reciprocity*

To give a first idea of how public support for reciprocity and institutional reliance on the principle of reciprocity for benefit provisions (as captured by the summary measure for the different social insurance programmes) are related empirically, we start with a simple scatterplot. Figure 9 shows that there is a positive relationship between institutional reciprocity and public support for the reciprocity principle in the European countries analysed here. In line with our theoretical expectations, we find that the principle of reciprocity appeals the least to the public in countries where the financing and/or provision of social benefits is characterized by a low degree of reciprocity. The lower left corner of the figure contains the UK  and Ireland, two countries that primarily rely on low and means-tested social benefits, along with Denmark, a universal welfare state with a lower degree of institutional reciprocity than its Nordic neighbours. Reciprocity receives the strongest public support in the Continental/Mediterranian corporatist countries Germany, Portugal, Spain, all located on the upper half of the reciprocity scale. Clustered in between these two extremes in terms of support for reciprocity are a number of countries with intermediate levels of institutional reciprocity and support for the reciprocity principle.

Some outliers catch the eye and warrant a few remarks: The Netherlands and Slovenia combine highly reciprocal social insurance systems with low public support for the principle of reciprocity. The Slovenian social insurance system is marked by a high degree of reciprocity on both the benefit and financing sides, which apparently is not enough to foster positive reciprocity attitudes. The Netherlands displays modest reciprocity on the benefit side. The country combines flat-rate benefits with financing that to 100 percent relies on insured person's contrinution. Since flat-rate benefits are less supportive of a reciprocity norm, it is perhaps not so surprising that The Netherlands scores lower than expected on support for the reciprocity norm.

Looking at the fitted line in Figure 9, we note that an increase in institutional reciprocity from the minimum value in our sample (0.3) to the maximum value in our sample (0.8) is associated with a 28 percentage point increase in public support for reciprocity. This strong bivariate relationship between our two main variables lends some preliminary support to the idea that institutional design and attitudes covary, and differ substantially across European countries.

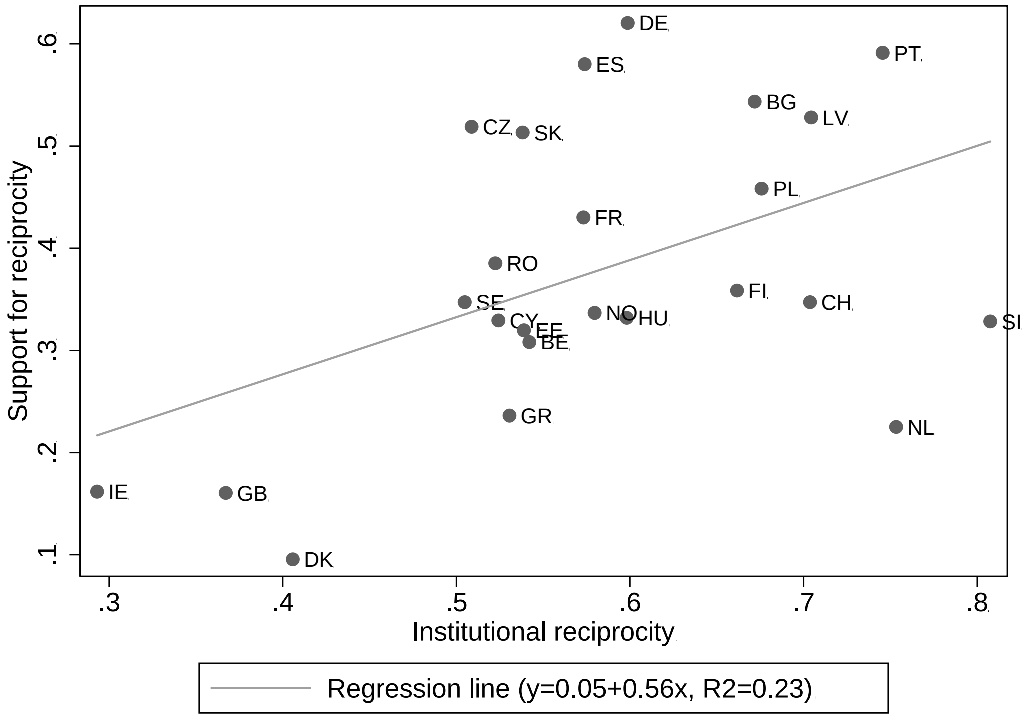


Figure 9. Institutional reciprocity and support for reciprocity in 24 EU and EFTA countries, 2005/2008

A more stringent test of our first hypothesis is provided by the regression analysis in Table 1. It presents four empirical models showing how support for the principle of reciprocity is related to institutional design. We have, in addition to the institutional reciprocity index, included three control variables that have figured prominently in the literature as determinats of attitudes related to the welfare state. All four models include the 24 EU and EFTA countries listed above, and consistently generate positive and statistically significant coefficients, in line with our expectation. Within our sample of countries, moving from a minimally reciprocal social insurance system (such as Ireland's) to one that is maximally reciprocal (such as Slovenia's) increases average public support for the principle of reciprocity by about 23 percentage points based on the coefficient estimates in model 4, where we control for GDP per capita, ethnic fractionalization, and the quality of government. The introduction of control variables in models 2-4 lowers the coefficient estimate for institutional reciprocity by about one fifth, to 0.47. The effects of the control variables are not statistically significant when they are all included in Model 4. In sum, our overall results from this basic regression confirm our first hypothesis, i.e., that public support for the idea of reciprocity is greater in countries that have put this principle into practice in their social insurance systems.

Table 1. Regression analysis of the support for reciprocity in 24 EU and EFTA countries, 2008

| | Model 1 | Model 2 | Model 3 | Model 4 |
|---|---|---|---|---|
| | Support for reciprocity | Support for reciprocity | Support for reciprocity | Support for reciprocity |
| Institutional reciprocity | 0.559** | 0.486** | 0.467** | 0.467** |
| | (0.220) | (0.208) | (0.213) | (0.218) |
| GDP per capita | | -0.025** | -0.023* | -0.027 |
| | | (0.012) | (0.012) | (0.023) |
| Ethnic fractionalization | | | 0.096 | 0.114 |
| | | | (0.153) | (0.176) |
| Quality of Government | | | | 0.074 |
| | | | | (0.334) |
| Constant | 0.053 | 0.183 | 0.165 | 0.120 |
| | (0.130) | (0.136) | (0.141) | (0.249) |
| N | 24 | 24 | 24 | 24 |
| $R^2$ | 0.227 | 0.360 | 0.373 | 0.375 |

Entries are OLS coefficients. Standard errors in parentheses.
*** p<0.01, ** p<0.05, * p<0.1

### *5.2 Institutional design and support for reciprocity: the case of pensions*

The result from our programme-specific analysis of pensions in Figure 10 shows great similarities with the results of the analysis of the aggregate 'systems' variables' shown in Figure 9. While a number of countries change positions on one or both dimensions, we can see that most of these movements are modest and almost all countries remain on the same side of the regression line in the two scatterplots. In short, the results here give preliminary support to H2.

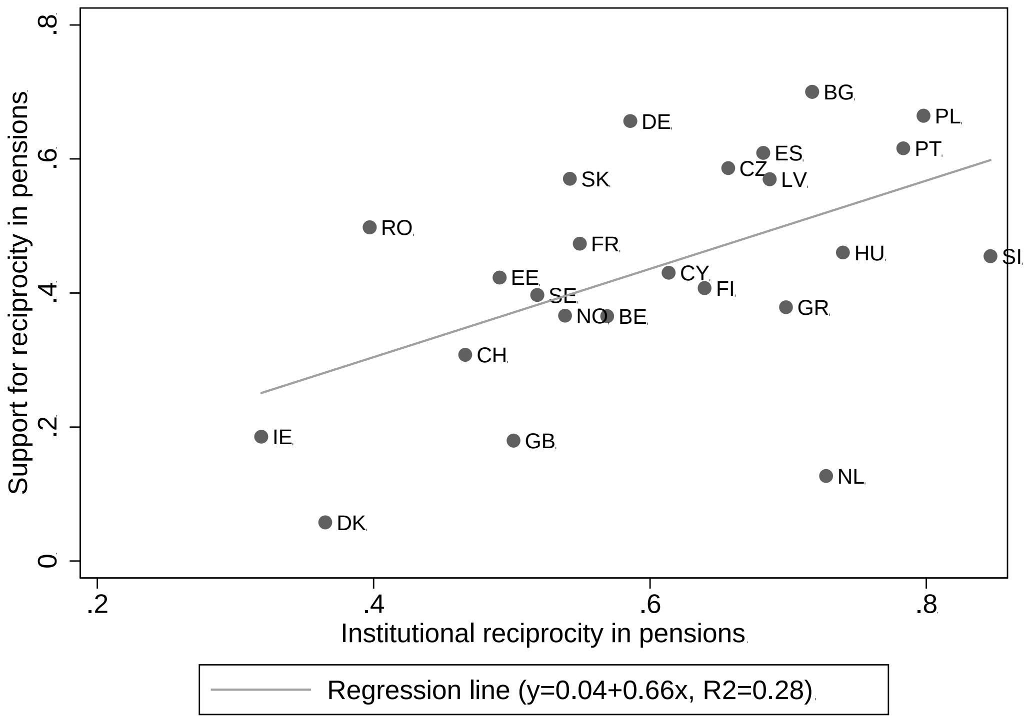


Figure 10. Pensions: Institutional reciprocity and support for reciprocity in 24 EU and EFTA countries, 2005/2008

Turning to the more stringent test provided by the regression analysis in Table 2 below, the the results of the programme-specific analysis are strikingly similar to those of the entire system. All four models generate positive and statistically significant coefficients for the institutional/pension reciprocity index, in line with our expectation. The effects of all control variables are also here not statistically significant (in the 'full' Model 4). In sum, our overall results confirm our second hypothesis, that public support for the idea of reciprocity is greater in countries that have put this principle into practice in their pension systems.

Table 2. Support for reciprocity in pensions systems in 24 EU and EFTA countries, 2008

| | Model 1 | Model 2 | Model 3 | Model 4 |
|---|---|---|---|---|
| | Support for reciprocity in pensions | Support for reciprocity in pensions | Support for reciprocity in pensions | Support for reciprocity in pensions |
| Institutional reciprocity, pensions | 0.659*** | 0.395* | 0.428* | 0.446* |
| | (0.227) | (0.221) | (0.224) | (0.228) |
| GDP per capita | | -0.039** | -0.035** | -0.017 |
| | | (0.014) | (0.015) | (0.026) |
| Ethnic fractionalization | | | 0.151 | 0.082 |
| | | | (0.167) | (0.188) |
| Quality of Government | | | | -0.290 |
| | | | | (0.359) |
| Constant | 0.041 | 0.338* | 0.269 | 0.430 |
| | (0.140) | (0.163) | (0.181) | (0.270) |
| N | 24 | 24 | 24 | 24 |
| $R^2$ | 0.277 | 0.470 | 0.491 | 0.508 |

Entries are OLS coefficients.
Standard errors in parentheses.
*** p<0.01, ** p<0.05, * p<0.1

*5.3 Institutional design and support for reciprocity: unemployment insurance*

The results from our programme-specific analysis of unemployment insurance display (in Figure 11) noteworthy differences compared to the analysis of both the 'aggregate systems' variables' and the pension variables.  The differences are most remarkable when it comes to how countries score on the institutional dimension, but they are not confined to that dimension. It is also clear that the patterns of association between institutions and normative attitudes is weaker in the case of unemployment insurance, thus lending only very modest support to H3.

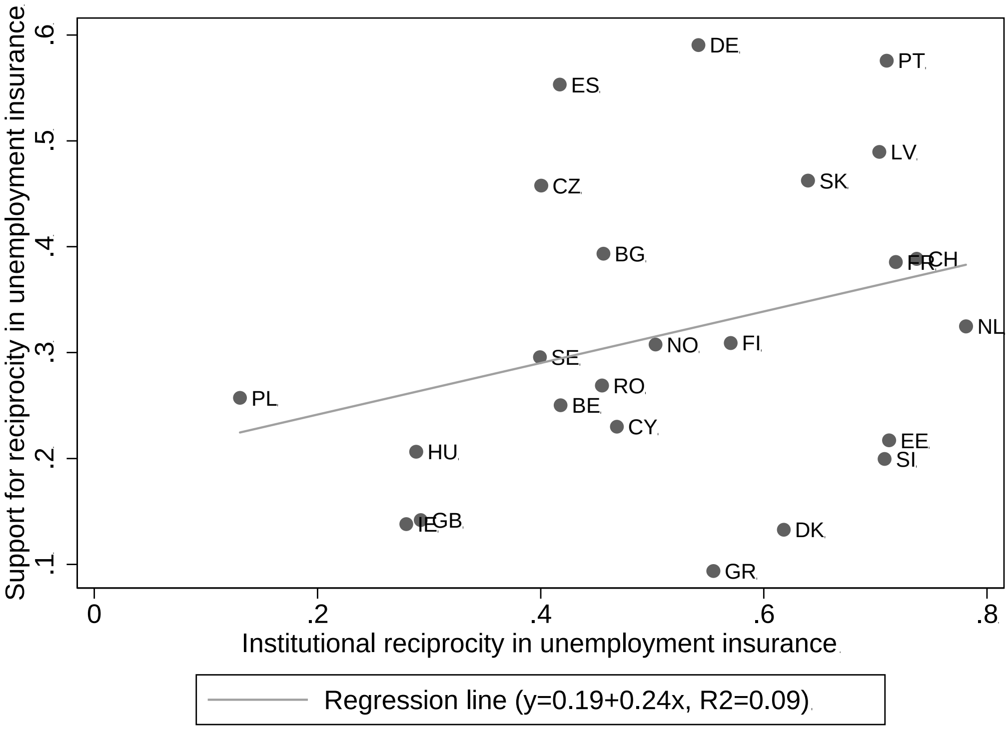


Figure 11. Unemployment insurance: Institutional reciprocity and support for reciprocity in 24 EU and EFTA countries, 2005/2008

The more stringent test provided by the regression analysis in Table 3 confirms that the relationship is weaker in the case of unemployment insurance. All four models generate positive but statistically non-significant coefficients for the institutional unemployment insurance reciprocity index. The effects of all control variables are also statistically not significant here. Our overall results cannot confirm our third hypothesis, i.e., that public support for the idea of reciprocity is greater in countries that have put this principle into practice in their unemployment insurance systems.

Table 3. Support for reciprocity in the unemployment insurance in 24 EU and EFTA countries, 2008

| | Model 1 | Model 2 | Model 3 | Model 4 |
|---|---|---|---|---|
| | Support for reciprocity in unempl. insurance | Support for reciprocity in unempl. insurance | Support for reciprocity in unempl. insurance | Support for reciprocity in unempl. insurance |
| Institutional reciprocity, unempl. ins. | 0.244 | 0.269 | 0.238 | 0.234 |
| | (0.170) | (0.173) | (0.180) | (0.181) |
| GDP per capita | | -0.013 | -0.009 | -0.030 |
| | | (0.014) | (0.015) | (0.027) |
| Ethnic fractionalization | | | 0.131 | 0.217 |
| | | | (0.184) | (0.207) |
| Quality of Government | | | | 0.347 |
| | | | | (0.385) |
| Constant | 0.193* | 0.224** | 0.199* | -0.009 |
| | (0.093) | (0.100) | (0.107) | (0.254) |
| N | 24 | 24 | 24 | 24 |
| $R^2$ | 0.086 | 0.120 | 0.142 | 0.178 |

Entries are OLS coefficients.
Standard errors in parentheses.
*** p<0.01, ** p<0.05, * p<0.1

### *5.4 Institutional design and support for the dual-earner model*

Turning to the relationship between Dual-earner policy and normative attitudes about female labour force participation, the scatterplot below displays a modest correlation. A large group of countries do not differ much on the policy dimension but a lot in terms of normative attitudes. The Dual-earner model countries follow our expectations and score high on both dimensions. Romania and Slovenia both score high on the policy dimension. While Romania scores low on the normative support for female labour force participation, Slovenia scores much higher. Figure 12 suggests only modest support for our fourth hypothesis.

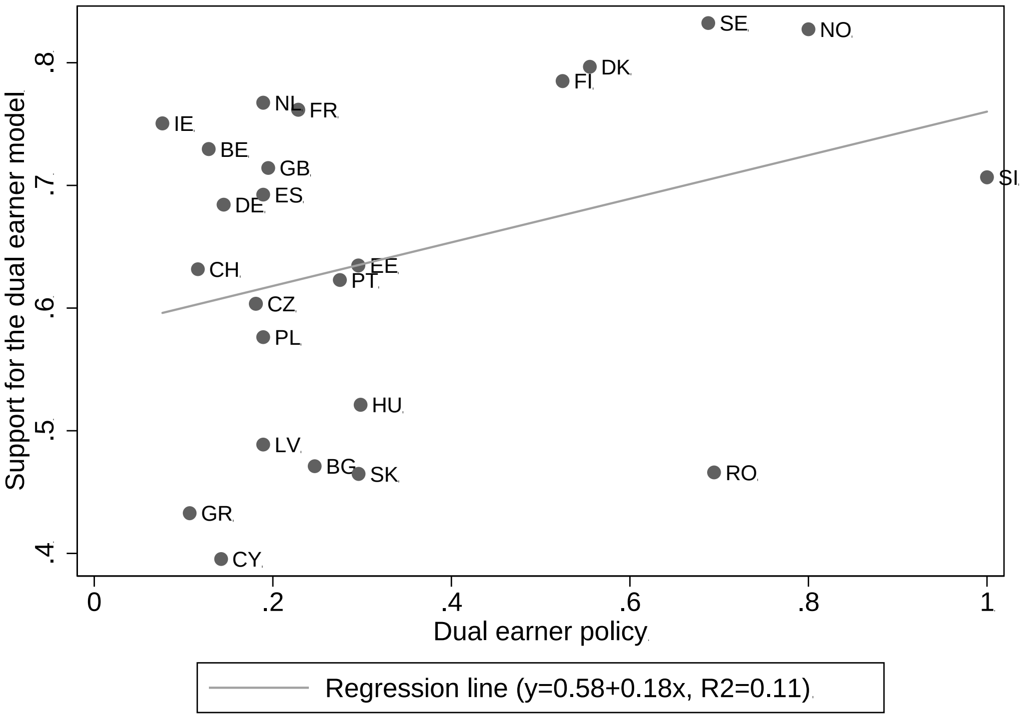


Figure 12. Dual earner policy and support for the dual-earner model in 24 EU and EFTA countries, 2006/2008

When we examine the more stringent test of the relationship provided by the regression analysis in Table 4 below, it confirms that the relationship between welfare institutions and welfare attitides is weak in the case of Dual-earner policy. The four models generate positive but sometimes statistically non-significant coefficients for the institutional Dual-earner indicator. The effects of all control variables are statistically significant in some cases. While our overall result cannot rule out our fourth hypothesis, that public support for female labour force participation is greater in countries that have policies that are in line with the Dual-earner model, the coefficient is only significant in the full model and only at the 10% level. The effects of the control variables, both GDP per capita and Quality of Government, warrant further investigations in the future. It may be that both these variables pick up a difference between older and recent member states of the EU that is not necessarily related to support for female labour force participation.

Table 4. Regression analysis of support for the dual-earner model in 24 EU and EFTA countries, 2008

| | Model 1 | Model 2 | Model 3 |
|---|---|---|---|
| | Support for the dual-earner model | Support for the dual-earner model | Support for the dual-earner model |
| Dual-earner policy | 0.178 | 0.117 | 0.145* |
| | (0.109) | (0.081) | (0.071) |
| GDP per capita | | 0.042*** | 0.006 |
| | | (0.009) | (0.015) |
| Quality of Government | | | 0.542** |
| | | | (0.198) |
| Constant | 0.583*** | 0.454*** | 0.161 |
| | (0.044) | (0.043) | (0.114) |
| N | 24 | 24 | 24 |
| $R^2$ | 0.108 | 0.543 | 0.667 |

Entries are OLS coefficients.
Standard errors in parentheses.
*** p<0.01, ** p<0.05, * p<0.1



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## Conclusion

This paper has analysed how national welfare institutions and normative attitudes to welfare vary across EU and EFTA countries, and how national welfare institutions are linked to welfare attitudes, an important and long-standing question of comparative welfare state research. Our focus in this paper has been on reciprocity in welfare institutions and normative attitudes, an important, and, we argue, under-researched issue that has also been at the heart of recent debates about common EU policy-making. In general, cross-country variations in wefare institutions and welfare attitudes can contribute to political conflicts about the design and principles underpinning a wide range of supra-national policies. In the context of the European Union, Ruhs and Palme (2018) provided a theoretical analysis of how and why cross-country differences in reciprocity in national welfare institutions ('institutional reciprocity') and attitudes ('normative reciprocity') may be an important determinant of the recent political conflicts between EU Member States about about whether, and how, to reform 'free movement' and EU migrants' access to national welfare states.

To study variations in 'institutional reciprocity', the paper has constructed and analysed new indicators of how countries in the EU/EFTA vary when it comes to the degree of reciprocity in their social protection systems. We designed our institutional reciprocity index so that it reflects underlying differences in the reliance on the insured person's contributions to the the financing of the system as well as the earnings-relatedness of the benefit side of the system. When we compared broad social protection regime categories, we could identify a pattern with regard to the institutional reliance on reciprocity. The countries in the Basic security regime show the lowest degree of reciprocity and the countries in the Universal regime show moderate levels of reciprocity. The variation among the countries in the two corporatist regimes as well as the State insurance regime is large, but the tendency is for the countries in the State insurance regime as well as the Continental corporatist regime to have the strongest reliance on the reciprocity principle for the provision of benefits.

We have also demonstrated that normative attitudes regarding reciprocity differ greatly between the populations in the EU/EFTA countries. While the results display a complex picture, our analysis identified some patterns that are in line with our theoretical expectations. The populations in the Basic security countries score low on reciprocity (as a normative attitude) even if it is Denmark (in the Universal regime) that scores the lowest. The other Universal regime countries also score below average, which is what we expected. Again, countries in the State insurance as well as the two corporatist regimes show large variations, but with a tendency to score above average.

To test the correlation between the institutional reciprocity and reciprocity as a normative attitude we applied a 'variable approach' rather than a regime approach, in order to come closer to the core of the idea of reciprocity. We found a clear cross-sectional correlation between the institutional measure of reciprocity and the average level of normative attitudes to reciprocity (as a principle for benefit provision). While the results of our basic regression analyses are more or less congruent with our hypotheses, the strength of the association varies considerably between the different hypotheses. When it comes to the first two hypotheses the regression coefficients are significant: (H1) The more reciprocity in the social insurance system, the larger the proportion of the population that will share the view that benefits should follow the reciprocity norm; and (H2) The more reciprocity in the pension system, the higher the proportion of the population that will share the view that pensions should follow the reciprocity norm.

The analysis of the third hypothesis, that there is a relationship between reciprocity in unemployment insurance and attitudes toward unemployment insurance, failed to generate a significant association. Similarily, our analysis finds only modest support for the fourth hypothesis, i.e. the expectation that the stronger the reliance on the Dual-earner model in family policy, the stronger the public support for women's equal access to the labour market, i.e. the dual-earner norm. The lack of longitudinal data and the relative stability of the institutional characteristics of European welfare states make it difficult to go beyond correlational analysis.

Overall, the analysis in this paper has found substantial cross-country differences in social protection programmes in relation to the concept of reciprocity and considerable variations in normative attitudes in relation to reciprocity, and shown that there is a clear correlation between the two. That national institutions matter for normative attitudes around core welfare state programmes may have important consequences for views about free movement among the European populations, with potential repercussions for the politics around free movement in the EU – issues that we will explore in future research, as part of the REMINDER project.

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# REMINDER

## ROLE OF EUROPEAN MOBILITY AND ITS IMPACTS IN NARRATIVES, DEBATES AND EU REFORMS

The REMINDER project is exploring the economic, social, institutional and policy factors that have shaped the impacts of free movement in the EU and public debates about it.

The project is coordinated from COMPAS and includes participation from 14 consortium partners in 9 countries across Europe

UNIVERSITY OF OXFORD

This project has received funding from the European Union's Horizon 2020 research & innovation programme under grant agreement no 727072

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