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7. Political institutions and the welfare state

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Abstract

This chapter explores insights from the past twenty years of scholarly literature on institutions and the welfare state. Institutions help to explain both the enduring differences between national welfare states and the nature of welfare-state reform. The chapter addresses three conceptual and theoretical challenges in the study of institutions and the welfare state before examining how electoral systems, federalism, and other political institutions influence variations in welfare regimes and reform processes. It concludes by summarizing the main trends in scholarship on institutions and the welfare state over the past two decades and discussing prospects for research in this field.

Keywords: institutions, welfare state, veto players, electoral systems, federalism

1. Introduction

By the 2000s, it was well-understood among scholars that many of the enduring differences between national welfare states are explained by political institutions such as the electoral system and federalism. It was also evident that these institutions influence processes of welfare-state change. Political institutions have therefore become central to two of the main research agendas in welfare-state scholarship: understanding why welfare regimes differ and examining how welfare states can be reformed to adapt to changing social, economic, and political circumstances.

This chapter explores insights from the past twenty years of scholarship on institutions and the welfare state. As I explain in the next section, scholars of the welfare state have taken many different approaches to institutions. Indeed, the term 'institutions' has been used not only to refer to basic political institutions such as the electoral system and federalism, but also to encompass the structure of the welfare state itself and historical policy choices that have become institutionalized through processes of path dependence. These distinctions are important to understand for scholars and students of the welfare state.

The chapter is closely related to others in this book, notably Chapter 3, which examines the role of ideas; Chapter 4, which is concerned with interest organizations; Chapter 6, which studies path dependence; and Chapter 23, which analyses party competition and electoral politics. Institutions influence all these things: they channel the flow of ideas within the political system, grant or deny interest organizations access to decision-makers, shape path-dependent policymaking processes, and alter the incentives of political parties. However, the detailed discussion of ideas, interest organizations, path dependence, and party competition will be left to the chapters just mentioned. This chapter is mainly concerned with how central political institutions such as proportional elections and federalism help explain differences between welfare states and processes of welfare-state change.

The next section discusses the conceptual and theoretical problem of how to define political institutions and analyse their effects on the welfare state. The sections that follow examine some of the key developments in scholarship in this field during the past two decades. The final section concludes by summarizing the main trends in scholarship on institutions and the welfare state over the past two decades and discussing prospects for research in this field.

2. Approaches to institutions

Before we begin to analyse the relationship between specific institutions and specific welfare-state outcomes, we need to explain what we have in mind when we speak of 'institutions,' what types of institutions there are, and what approach we take when we set out to study them.

2.1 Which institutions?

When scholars of the welfare state use the term 'institutions,' they usually have one of three things in mind.

First, the term can refer to the basic rules of politics. Among democracies, those basic rules encompass the electoral system (majoritarian, proportional, or mixed), the structure of the state (unitary or federal), the form of government (parliamentary or presidential), as well as much more detailed rules, such as the standing orders of the legislature. This is how the term 'institutions' is commonly used in political science, and it is the one we will concentrate on in this chapter.

Second, the term 'institutions' can refer to the organization of the welfare state itself. As discussed in Chapter 9, which examines the so-called dependent-variable problem in welfare-state research, many scholars of social policy have argued that the main differences among welfare states are not primarily about the level of government spending on social policy, but about the organization and regulation of social-policy programs. Welfare-state 'regimes' (Esping-Andersen, 1990) consist of institutions that decide how authority is allocated among public agencies, whether and how interest organizations are involved in policymaking and the implementation of social policy, what rights individuals have, and what responsibilities are expected of them (see also Chap. 11).

Third, one of the key ideas in the literature on 'path dependence' is that public policies, once adopted, can themselves become institutions through process of institutionalization and policy feedback (see Chap. 5). Paul Pierson made this argument in the early 1990s (see especially Pierson, 1993), and it became highly influential in welfare-state research through the edited volume *The New Politics of the Welfare State,* published in 2001.

The three types of institutions we have discussed here are different but related. As we will see later in this chapter, many scholars believe that institutional differences among welfare states (the second meaning of 'institutions') are consequences of underlying differences among political systems (the first meaning of 'institutions'). But the emergence of welfare regimes (the second meaning of 'institutions') is also a result of path-dependent political processes, through which historical policy choices have become institutionalized (the third meaning of 'institutions').

As mentioned, most of the discussion in this chapter is concerned with the first meaning of institutions – institutions as the basic rules in a political system. The other two concepts of institutions in the welfare-state literature – the structure of the welfare state itself and policies inherited from the past – are discussed in more depth in other chapters.

2.2 Formal or informal institutions?

Some studies of institutions are concerned exclusively with formal rules that are set out in a written constitution, statutory texts, or government decrees. In contrast, other studies define institutions much more broadly, incorporating informal rules and norms that influence how political agents think about what is right and appropriate for them to do.

The main argument against narrow, formal definitions of institutions is that informal rules and norms are evidently very important in real-world political processes. Conversely, the main argument against broad, informal definitions is that they can blur the distinction between institutional explanations and other types of explanations. Whether this blurring is a strength or a weakness is up for debate. For instance, Pierson's argument that over time, policies can become institutions in their own right (Pierson, 1993) suggests that we ought to be wary of making a sharp distinction between institutions and public policies.

The distinction between formal and informal institutions is closely related to the distinction between rationalist and non-rationalist theories of how and why institutions matter for political outcomes. Some scholars primarily think of institutions in terms of how they constrain strategic, forward-looking political agents. That is a rationalist approach. Others think of institutions in terms of how they shape the norms that prevail in political societies. That is a non-rationalist approach. The first approach typically relies on narrow, formal definitions of institutions. The second typically relies on broad definitions.

These theoretical problems were central to the institutionalist literature that emerged in the 1980s and 1990s (Thelen and Steinmo, 1992; Hall and Taylor, 1996). This literature has continued to influence the literature on institutions and the welfare state in the twenty-first century.

2.3 One institution or many?

A third important distinction to keep in mind, before we begin our discussion of more recent developments in welfare-state scholarship, is between studies of individual institutions such as the electoral system or federalism and studies of how institutions combine into systems of 'veto points' or 'veto players.'

By the early 2000s, many studies of the welfare state were inspired by Ellen Immergut's idea of veto points, which is a concept that Immergut defined as "points of strategic uncertainty" within the political system (Immergut, 1992: 27) where the government might be prevented from carrying out its preferred policies because of opposition from other parties or groups.

For example, Huber et al. (1993: 719) argued in an influential paper more than thirty years ago that the development of the welfare state has been slower in countries with many veto points since "certain aspects of constitutional structure impede social reform" by allowing groups who are negatively affected to block or delay policy changes even if they are in the minority. They emphasized veto points that result from institutions such as "federalism, presidential government, strong bicameralism, single-member-district electoral systems, and provisions for referenda" (Huber et al., 1993: 722).

Another influential idea in the 1990s and early 2000s was Tsebelis' concept of "veto players", which is related to, but different from, Immergut's "veto point" concept. For Tsebelis, "veto players" are *agents* that can prevent policy changes from happening. For Immergut, "veto points" are *locations* within the political system in which interest groups can exert influence. What both concepts have in common, however, is the idea that scholarship ought to rely on combined measures of institutional structures—an idea they share with Lijphart's work on "majoritarian" and "consensual" democracies (Lijphart, 2012) and Gerring's and Thacker's work on "centripetal democratic governance" (2010).

As we will see below, these broad measures of institutional structures have become less common in contemporary empirical scholarship on the welfare state than they were ten or twenty years ago. Instead, applied empirical work more often relies on indicators of individual institutions, such as proportional elections or federalism. However, at a conceptual and theoretical level, as heuristics, the ideas about "veto points" and "veto players" continue to be influential.

The main argument for using broad measures of systems of institutions is that individual institutions always interact with other institutions, and it is important to take those interactions into account. The main argument for taking a narrow, institution-by-institution approach, as in much contemporary scholarship, is that it can make the analysis of institutional effects more concrete, focused, and nuanced.

3. Electoral systems

In Section 1, we discussed three broad conceptual and theoretical problems that are crucial to consider when analysing the relationship between institutions and the welfare state. In this section and the next, we will examine what scholarship from the past twenty years has revealed

about how specific political institutions have shaped enduring differences among national welfare states and influenced processes of welfare-state reform.

We will concentrate on electoral systems and federalism. There are three reasons for this. First, they are important institutions in their own right. For example, they are central to the two main dimensions in Lijphart's analysis of institutions in *Patterns of Democracy* (2012) – the executives-parties dimension and the federal-unitary dimension. Second, many scholars have studied their effects on the welfare state during the past two decades. Third, the evolution of scholarship on electoral systems, federalism, and the welfare state illustrates important trends in the broader field of institutional analysis.

It should come as no surprise that electoral rules matter greatly for public policies in modern democracies. All democracies in today's world have representative forms of government in which people elect their political leaders. The importance of the electoral system was also well-understood by the early 2000s.

Two of the contributions to *The New Politics of the Welfare State* (Pierson, 2001) were concerned specifically with political institutions, and electoral rules featured prominently in both of them.

Duane Swank's (2001) chapter on "Political Institutions and Welfare State Restructuring" (see also Swank, 2002) examined both electoral systems (which he thought of, following Birchfield and Crepaz (1998), as more or less 'inclusive'), the dispersion of authority within the state (following Huber et al., 1993), and the institutional structure of the welfare state itself (one of the broader concepts of institutions that we discussed in the previous section).

Guiliano Bonoli (2001), in his chapter on "Political Institutions, Veto Points, and the Process of Welfare State Adaptation", drew on more general theories of constitutional structures, such as Immergut's veto-points idea. Bonoli found that a concentration of power was only weakly related to the rate of policy change, but strongly related to distributional outcomes. In systems with majoritarian elections and single-party governments, he found that reforms tended to be more unilateral and to involve more retrenchment. In systems with proportional elections and coalition governments, he found that reforms tended to be more multilateral and to involve compensation for losers from reform.

Interestingly, there was, and is, significant disagreement among scholars of comparative public policy and comparative political economy on how to conceptualize and theorize the effects of the electoral system on public policies. Tsebelis (2002) thinks of political parties in coalition governments—which are, of course, much more common in countries with proportional elections than in countries with majoritarian elections—as veto players that tend to slow down reform. For Huber et al. (1993), on the other hand, proportional representation is associated with *fewer* veto points. They explain why in an important footnote in their article (Huber et al., 1993: 722). The fact that proportional electoral rules facilitate 'minority party representation' is not the key point, Huber, Ragin, and Stephens argue. Instead, they wish to identify "points of entry in the political system for influential minority groups to block legislation favoured by narrow electoral (or public opinion) majorities", and proportional representation leads to a lower likelihood of such blockage since they are associated with "high party control over nominations and … by stronger coherence of disciplined parties".

Scholars have continued to wrestle with these problems in the 2000s and 2010s. Most studies have reached conclusions that align with Bonoli's main idea, which is that proportional elections do not necessarily slow down reform but have powerful effects on the composition of

reforms and, therefore, on distributional outcomes. For example, Knotz and Lindvall (2015) found in their study of labour-market reforms that coalition governments were just as likely to cut the duration of unemployment benefits as single-party governments, but coalition governments compensated losers from reform by increasing spending on active labour-market policies whereas single-party governments did the opposite and cut spending on such programmes. Similarly, Petrova and Sznajder Lee (2023) have recently demonstrated that electoral institutions have mediated the effects of globalization on economic redistribution in Central and Eastern Europe: in countries with low electoral disproportionality, governments have done much more to compensate voters who were harmed by economic restructuring.

A few studies have gone even further than Bonoli did and argued that proportional elections and coalition governments can sometimes *speed up* reform. In a broad overview of European pension reforms, Immergut et al. (2007) expected to find that big reforms require a concentration of power but found the opposite. The authors were puzzled "that some countries with few veto players and no veto points … pulled back from controversial pension reforms when they encountered voter resistance [whereas] countries with many veto players and effective veto points … adopted significant legislation" (Immergut and Anderson, 2007: 24). In an influential study of pension reforms in France, Germany, and Switzerland conducted a few years later, Silja Häusermann (2010) argued, similarly, that a high number of formal veto players, such as political parties, and a high number of informal veto players, such as interest organizations, can be a political *asset* for reform-oriented governments. She argued that political fragmentation allows for 'coalitional engineering' and broad compromises that facilitate reform.

So far in this section, we have concentrated on how electoral institutions have influenced reform processes. Another important debate in comparative politics and comparative political economy concerns how electoral systems help to explain enduring differences between national welfare states. One particularly influential study was conducted by Iversen and Soskice (2006), who demonstrated that proportional elections are associated with a higher prevalence of centre-left governments and higher levels of redistribution than majoritarian elections.

Their finding regarding the composition of governments has subsequently been confirmed by Döring and Manow (2015), and, more recently, by a study of the consequences of the transition from majoritarian to proportional elections in New Zealand in the 1990s. In that study, Górecki and Pierzgalski (2023), using completely different methods, confirm both the composition-of-government and the redistribution finding in Iversen and Soskice's original paper. Relatedly, Paulsen (2022) has recently demonstrated with the help of historical evidence from Norway that the transition from majoritarian to proportional elections in the early twentieth century was also associated with more redistribution.

In a later study, Iversen and Soskice (2015) returned to electoral systems, examining how countries have adapted to the rise of the knowledge economy, deindustrialization, and the decline of Fordism. They argued that whereas labour markets have been deregulated in almost all countries, the electoral system has mattered greatly to whether governments have compensated the losers.

To sum up, since the early 2000s, scholars have used different methods to refine their analyses of the effects of the electoral system on the welfare state. The findings have been quite consistent, both when it comes to explaining processes of welfare-state reform and when it comes to explaining enduring differences between welfare states.

However, scholars of political geography have highlighted the diversity of the effects of electoral systems across countries. For example, Menendez (2016) argues that the relationship between globalization and public spending is conditional on both economic geography and electoral institutions. Similarly, Jurado and León (2019) find that the geographic distribution of social-benefit recipients can moderate the impact of electoral institutions on social policy, with majoritarian systems tending to increase social spending when recipients are concentrated in certain regions.

Meanwhile, scholars of political parties and the welfare state have highlighted the complex relationship between electoral systems and party systems, arguing that institutions such as the electoral system influence the dynamics of party competition, the behaviour of the political parties, and ultimately, therefore, the welfare state. For example, Häusermann et al. (2013) argue in an influential review of the contemporary literature on parties and the welfare state that political institutions influence the strategies and even the preferences of the political parties in many subtle ways, implying that parties on the left, in the centre, and on the right take very different positions on the welfare state in different political contexts. Chapter 23 analyses party competition and electoral politics in the welfare-state domain in more detail.

4. Federalism

We ended our discussion of the relationship between electoral institutions and the welfare state by noting that this relationship appears to be contingent on other factors, notably political geography and the behaviour of the political parties. The idea that the effects of institutions often depend on other factors was well-understood already in the early 2000s. For example, Pierson noted in *The New Politics of the Welfare State* that "we need to pay attention to interaction effects between institutional arrangements and other elements of a particular political configuration" (Pierson, 2001: 9).

The literature on institutions and the welfare state that has come out since the early 2000s has emphasized these sorts of interactive effects even more. Nowhere is this tendency more apparent than in the literature on the effects of federalism.

Federalism was one of the factors that scholars such as Immergut (1992) and Huber et al. (1993) considered in their pioneering work on institutions and social policy more than thirty years ago. They argued that on balance, federalism is associated with a less generous welfare state. A decade later, Obinger et al. (2005) showed that matters are more complicated: federalism appears to have varying effects on the welfare state across different countries.

Recently, a literature has emerged that examines the effects of federal reforms within individual countries, allowing for more precise estimates of the effects of state reforms in specific contexts.

One example is a recent study by Arnold and Stadelmann-Steffen (2017) that uses the so-called synthetic-control method to examine the effects of federalism on the development of the welfare state in Belgium. The main argument of their study, which is related to that of Obinger et al. (2005), is that the specific distribution of powers in a federal system needs to be considered when studying federalism's effects. In the Belgian case, the authors find that if Belgium had not adopted federalism in 1993, social spending would have decreased (as opposed to stabilizing under federalism, which is what happened). They conclude that federalism in Belgium has led to 'the expansion of subnational competencies within a still centrally organized tax system,' which means that 'subnational entities can maximize their financial resources without the need to consider the national state budget' (Arnold and Stadelmann-Steffen, 2017: 694).

By contrast, Bonoli and Champion (2015) argue that in Switzerland, the distribution of responsibilities between the federal government and the regions had very different effects. Specifically, their study finds that "the incentives and the risks associated with a division of responsibilities among different jurisdictions may constitute an obstacle to broad reforms that promote labour market participation of nonworking benefit recipients" (Bonoli and Champion, 2015: 77). Lindvall (2017: Chap. 3) reaches a similar conclusion about labour-market reforms in the Low Countries.

Kleider (2018) argues that the decentralization of fiscal authority within nation states is associated with more variability in social spending. This study also finds that the relationship between decentralization and the variability in social spending is itself contingent on other macro-level institutions that influence the degree of policy coordination within the federal state. Busemeyer (2008) instead concentrates on different types of spending, finding that fiscal decentralization has a positive effect of spending on policies that are normally provided at the local or regional level within federal states, whereas spending on policies that are typically within the remit of the national government tend to be lower in a decentralized fiscal structure.

In a recent study, Rogers (2021) has shifted the focus from European, North American, and Oceanian examples of federalism to Latin American cases. She finds that the main effects of federalism in Latin America have been to reinforce existing inequalities between regions and to make the provision of social policy more uneven across states in Latin American countries.

Finally, several important studies analyse the relationship between welfare-state reform and bicameralism, which is an institution that is closely related to federalism. For example, Vatter (2005) argues that bicameralism has acted as a brake on the expansion of the welfare state, reflecting earlier findings by, for example, Huber et al. (1993). In contrast, Auel (2010) suggests based on a German case study that the effects of bicameralism have often been exaggerated.

Däubler (2008) finds in a detailed study of social-policy bills in Belgium, Germany, and the United Kingdom that proposals initiated from the floor tend to be delayed by coalition governments and bicameralism, whereas cabinet bills are not. His conclusion is that comparative welfare-state research needs to consider the nuances of the legislative process and avoid drawing conclusions exclusively from macro-level data. As our discussions of electoral systems and federalism in Sections 2 and 3 have demonstrated, many studies from the past twenty years have done as Däubler advises by paying more attention to context, nuances, and detail than earlier scholarship on institutions and the welfare state, which tended to concentrate on broad, macro-level relationships.

In addition to the recent work on electoral systems and on federalism discussed thus far in this chapter, the past twenty years have seen a proliferation of work on other institutions. One important example is direct democracy. Huber et al. (1993), whose analysis is based on the idea that the welfare state expands when there is a government that is both set on adopting welfare-state reforms and able to carry out its agenda, argued that direct democracy tends to reduce social spending. Subsequent studies have suggested that things are more complicated.

For example, in a recent study based on panel data on social expenditures in the Swiss cantons during the twentieth century, Walter (2019) argues that the effects of direct democracy on the welfare state depend on the political environment. Specifically, Walter's empirical analysis shows that direct democracy has a 'thermostatic' effect (see Wlezien, 1995) by letting voters correct course when governments spend more or less than the median voter wants. Hence, when governments with many coalition parties spend more than most voters want, direct-democratic

instruments tend to lead to lower social spending, but the opposite is true when governments with few parties spend less than most voters want.

Walter's study of direct democracy is yet another example of the case-by-case, institution-by-institution approach of much contemporary scholarship on institutions and the welfare state. Contemporary scholars are suspicious of broad generalizations about the effects of institutions and curious about the specific effects of institutions in particular contexts.

5. Discussion

This chapter has taken stock of the literature on the relationship between political institutions and the welfare state and discussed the evolution of that literature during the past twenty years. The main lessons can be summarized as follows.

The importance of political institutions for the development of the welfare state and welfare-state reform was well-understood already more than twenty years ago. Indeed, many of the ideas that came out of the institutionalist literature in the 1990s and that were developed in several of the contributions to *The New Politics in the Welfare State* in 2001 have had staying power and continued to influence scholarship over the last two decades. Contemporary debates remain concerned with the central problems of explaining enduring differences between welfare states and understanding the politics of welfare-state reform that scholars had identified by the early 2000s. It therefore remains important for scholars to engage with earlier contributions to scholarship on the welfare state, going back to the middle of the twentieth century, when sociologists and political scientists began to take an interest in comparative welfare-state research.

Research conducted during the past two decades has in fact strengthened the case for the idea that political institutions help to explain both enduring differences among countries and the politics of welfare-state reform within countries. Twenty years ago, many scholars working on the welfare state (see Ha, 2008) were wondering whether the globalization of trade, capital, and production might lead to a convergence of welfare-state programmes across countries, despite the differences between their political institutions. There has been little evidence of such convergence. Indeed, since the early 2000s, scholars have found evidence of even more powerful institutional effects than what was widely known twenty years ago. The clearest example is the finding by Iversen and Soskice that proportional and majoritarian electoral systems are associated with major differences in welfare-state programmes and distributional outcomes (Iversen and Soskice, 2006) and the politics of reform (Iversen and Soskice, 2015). Their results have largely held up when they have been re-examined with the help of new data and new methods.

Whereas the main themes of scholarship on institutions and the welfare state have remained quite constant over time, the methods that scholars have relied on to study this relationship have changed greatly. The main methodological trend in scholarship on institutions and the welfare state during the past two decades has been a move away from broad macro concepts such as "veto points", "veto players", or "majoritarian and consensual democracies" and an increased emphasis on the analysis of specific political institutions and their effects on social policy.

This institution-by-institution approach has led scholars to ask new research questions and to develop a new appreciation for how much the effects of institutions vary across economic, social, and political contexts. as noted in this chapter's discussion of electoral rules, federalism, and direct democracy. An institution-by-institution approach also lends itself to being evaluated with the help of new methods for causal inference that have become popular among scholars of

comparative politics since the 2000s. The broad time-series cross-sectional designs that dominated the literature in the 1990s and early 2000s (see Chap. 25 for a discussion) are rarely used to study the effects of political institutions in contemporary scholarship. Quantitative case studies of the effects of specific institutional reforms in specific countries are seen more often, learning from discontinuities in time series or local and regional differences in public policy and other outcomes.

The advantage of such methods is that they allow for cleaner and more precise estimates of causal effects. The disadvantage is that the findings are often not generalizable to other political, social, and economic contexts. One might hope that in the future, scholars will be able to develop more refined mixed methods approaches, combining descriptive cross-country analyses, well-designed quantitative case studies, and nuanced qualitative analyses to both deepen and broaden our understanding of the relationship between institutions and the welfare state.

One of the most important trends in contemporary politics in both Europe, North America, and around the world is the transformation of party systems due to the rise of right-wing nationalism and environmentalism and the decline of the parties that historically have been most closely associated both with promoting the welfare state (social democratic and Christian democratic parties) and opposing it (right-wing liberal and traditional conservative parties). Given the importance of the interaction between party systems and political institutions such as the electoral systems and federalism, a central question for future scholarship on institutions and the welfare state will be how political institutions will channel and shape conflicts over the welfare state that involve right-wing nationalist parties, green parties, and other new parties. This research is only in its infancy, but it seems safe to assume that scholars of the welfare state will have to pay close attention to political institutions in the future, as they have done for the past thirty years.

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