
26. Ideational drivers of welfare reform in the European Union

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INTRODUCTION

Echoing a broader “turn to ideas” in public policy research (Béland and Cox 2011) going back to the late 1980s (Kingdon 1984; Sabatier 1988; Hall 1993), research on welfare state reform has progressively considered ideational drivers of reform processes, especially from the 2000s onwards. While hard to define, ideas can be conceived as “beliefs held by individuals or adopted by institutions that influence their actions and attitudes” (Béland and Cox 2011, p.6). Ideational drivers of welfare state reforms have been analysed through a variety of analytical tools including types of ideas (normative, cognitive, expertise, paradigms) and concepts teasing out how agents can gain “power through, over and in ideas” (Carstensen and Schmidt 2016, p.318) and persuade others through discursive devices including (re)framing, storytelling, narratives, etc. Ideational scholarship is diverse and anchored in a range of epistemic and ontological approaches spanning from constructivism to positivism, but the common assumption is that ideas play an important role in shaping policy-making. Once institutionalized, ideas structure political processes and drive continuity and change in policies. As such, ideational approaches have become important to complement functionalist perspectives focusing on structural trends such as globalization, demographic change, and permanent austerity (Pierson 2001), on the one hand, and institutionalist scholarship mainly concerned with the role of policy legacies and the resilience of welfare state types, on the other (Béland 2005).

This has gone hand in hand with an opening up of social policy scholarship to transnational phenomena, including how international organizations, especially the Organization for Economic Co-operation and Development (OECD) or the International Monetary Fund (IMF), and even more so the European Union (EU), have gained direct or indirect influence on welfare state reforms. In the absence of competence for direct intervention, this influence has been mainly ideational by shaping the discourses of policy-makers.

Our contribution focuses on the EU for three reasons. First, the European continent is the cradle of the welfare state and has the most advanced – but also diverse – institutionalized models of social protection in the world. Second, in the context of structural economic transformations, global competition, and ageing societies, European welfare states have been facing acute challenges and continuous reform.

Third, due to EU integration, the continent is a unique laboratory for the circulation of ideas and policy recipes.

In the next section, we take stock of the knowledge gathered on drivers of welfare state reform until the early 2000s, to then expand on advances and key findings since then. Subsequently, we put four main ideational drivers of reform in Europe to the fore, namely marketization, fiscal discipline, social investment, and resilience. The following section discusses the advances of research and the tensions in the face of new challenges. It is argued that current challenges, including the green transition, digitalization, and the intensification of migrations, all have a strong cross-border dimension. This seems to underpin a shift from collectively institutionalized solidarity in the national realm to a transnational (human) rights-based approach. This poses a challenge to a field of research, namely comparative welfare state analysis, which is still – arguably – overly focused on the national “boundaries of welfare” (Ferrera 2005).

THE STATE OF THE WELFARE STATE AT THE TURN OF THE MILLENNIUM

The period from around the 1980s to the early 2000s was set in a context of changing “political priorities and administrative style, leading to a downgrading of traditional social democratic concerns in favour of technocratic management and economic efficiency” (Petersen et al. 1999, p.39). As a consequence, policies of social protection were increasingly viewed as hindering economic growth, undermining competitiveness, and contributing to rather than addressing unemployment and dependence (Evers and Guillemard 2013). *Globalization* rhetoric entered the political discourse as “an argumentative vehicle for disciplining the aims of social justice and welfare” (Wodak and Weiss 2000, p.38), or, at least, to modify solidarity arrangements (Moreno and Palier 2005, p.166). Yet, social policy scholars nuanced fears of dismantling welfare states altogether by highlighting incremental reform and adjustment shaped by respective institutional contexts and national trajectories (Pierson 2001). Alongside Pierson and Esping-Andersen (1990), Hall and Soskice (2001) predominantly draw on historical institutionalist or welfare regime theoretical premises, stressing institutions and interests as drivers of welfare state reform. Despite structural pressures, these scholars identified relative stability in welfare state institutions.

FROM RELATIVE STABILITY TO IDEATIONALLY DRIVEN INSTITUTIONAL CHANGE

In the early 2000s, Béland and his colleagues pioneered ideational research in the study of welfare state reform with comparative studies stretching across Europe, Canada, and the United States (e.g., Béland and Hansen 2000; Béland and Waddan 2000; Béland and Lecours 2005). They showed how concepts of ideational research

could be used to define agendas, put forward alternatives and paradigms, and empower policy entrepreneurs (Béland 2005). Schmidt (e.g., 2002) likewise provided pioneering studies on how crafting effective discourse – or the lack thereof – could contribute to the success or failure of reforms. She further showed how different institutional settings could explain the strength or weakness of “coordinative discourse” among elites and “communicative discourse” towards the wider public (Schmidt 2000).

Taylor-Gooby’s 2005 edited volume on *Ideas and Welfare State Reform in Western Europe* became an authoritative analysis highlighting the role of ideas as accompanying welfare state reform: “Paradigm and discourse approaches offer valuable ways of summing up changes in the range of available policy frameworks, but need to be allied to accounts of shifts in the position of political actors in order to provide a fuller understanding of how changes take place” (Taylor-Gooby 2005, p.28).

A particular puzzle motivating a turn to ideas is that Bismarckian welfare states, long considered too sticky to reform – a “frozen landscape” in the words of Esping-Andersen (1996) were like “elephants on the move” (Hinrichs 2000). Indeed, incremental reform occurred in the three primary domains of Bismarckian social insurance: unemployment, pensions, and healthcare (Palier 2010). As Stiller (2009) shows, even Germany – the poster child of the Bismarckian welfare state long considered resistant to change – could be reformed through ideational leadership (for an application of the concepts of ideational leadership and entrepreneurship in the EU context, see, for example: Crespy and Menz 2015; Vesan and Corti 2021).

Gradually, scholarship expanded beyond comparative analysis *stricto sensu* to increasingly factor in the role of the EU. The *Europeanization* literature differentiates between horizontal and vertical dynamics. In the latter case, i.e., vertically from one level of government to another, policy is not necessarily imposed downwards (*downloading*) but also moves up from a lower level (*uploading*), whereas horizontal Europeanization refers to diffusion between different jurisdictions, commonly Member States (Crespy 2019, p.250). In the twenty-first century, the EU has become an important arena in steering welfare states in Europe (see, for example, Hassenteufel and Palier 2016; de la Porte and Palier 2022). With the adoption of the Lisbon strategy in 2000, soft governance was launched to facilitate EU-wide coordination where the EU had no formal competence to enact legally binding regulation. The EU has therefore come to provide a space for coordination, peer-review, and diffusion of ideas (Zeitlin 2011).

An important element in the ideational stewardship of welfare reform has been the use of common statistical tools which the EU has sought to harmonize at least since the 1990s (Penissat & Rowell 2015). Situating these tools in the context of the Open Method of Coordination (OMC), Jacobsson (2004, p.356) refers to “discursive regulatory mechanisms related to language-use and knowledge making and thus fundamentally [sic] to meaning-making”. These include joint language use, common classifications, the strategic use of comparisons and evaluations coupled with social (peer) and time pressure. Thus, epistemic communities gravitating around the EU as well as the OECD have been identified as producers of new ideas in social policy

(Weishaupt 2010, p.464) with statistical tools co-constructed by academic experts and bureaucratic apparatuses (Kassim and Le Galès 2010).

In the following, we focus on four key broad ideas which have served to (re)shape European welfare states, namely: 1) marketization, 2) fiscal discipline (austerity), 3) social investment, and 4) resilience. Far from being isolated from one another, these four themes are complementary and often overlap in legitimizing policy discourses.

FOUR IDEATIONAL DRIVERS OF WELFARE REFORM IN THE EU CONTEXT

The four ideas presented below are not exhaustive and constitute, as such, only examples of some of the ideas that have been shaping welfare state reforms. Moreover, not all scholars position themselves as ideational researchers, in the sense that not all of them treat ideas as an explanatory factor (independent variable) for policy change or continuity. Rather, we embraced a broader spectrum of research where many contributions treat ideas, e.g., the emergence or resilience of policy solutions and paradigms, as outcomes to be explained by other factors (dependent variables). Taken as part of a broader, indeed cumulative, collective research endeavour, they nevertheless contribute to enlightening the emergence, consolidation, or demise of structuring ideas over time.

Marketization

Marketization ensues from the broader neoliberal restructuring of global capitalism from the 1980s onwards. One of its key tenets is that competitive markets are most conducive to optimal resource allocation. This belief has had a tangible impact on social policy broadly speaking. As Krzyżanowski (2016, p.310) synthesizes “one of the central features of neoliberalism is the fact that it introduces economic and market-driven logic into social and especially public domains previously not characterized by economic relations”.

Marketization has implied the re-commodification of sectors that had been considered “public” services. European countries such as the United Kingdom (UK), Sweden, and the Netherlands pioneered the marketization of healthcare, schools, and long-term care. Both left-wing and right-wing parties have pursued these policies, albeit with different goals: the former aiming to sustain the welfare state through increasing efficiency, whereas the latter has sought to curtail it for the benefit of the private sector (Gingrich 2011).

Against this background, marketization has mainly been a transnational phenomenon ensuing from liberalization (Frangakis et al. 2009). From the late 1980s onwards, the deepening of the Single Market has encompassed virtually all public services, including social services, acknowledged under the label of Services of General Interest in EU law. From this perspective, welfare services cannot be a priori exempted from EU competition law and its restrictions on state aids, i.e., public

subsidies. Despite occasional protests, the EU has been a catalyzer of liberalization and marketization policies in a consistent fashion (Crespy 2016). Political activism from the European Commission towards building competitive markets combined with the constitutionalization of the freedom of movement in services and capital has had important ramifications (Crespy 2016). Echoing ongoing trends in some Member States, a series of liberalization directives in the 1990s and 2000s have turned public services in air, rail, and urban transport, telecommunications, distribution of mail, and energy (including electricity and gas) into competitive markets. The emergence of private transnational operators has reshaped the provision of healthcare, elderly care, and pension insurance. Recent studies on marketization, for instance in the care and private pensions sectors, analyse the tension between the public logic of welfare and the market logic of profit and intrinsic instability (Ebbinghaus 2015). The multi-pillar pension model (see Chap. 20), implying an important private pillar alongside state and occupational pensions, is perhaps most illustrative of converging ideas which have made fiscal discipline and marketization two sides of the same coin. The EU has encouraged and regulated the emergence of an occupational pension funds market, notably with its 2003 Directive (revised in 2016).¹ Moreover, it has encouraged its member countries to engage with cost-saving pension reforms in the name of fiscal discipline, not least after the 2008–10 financial and sovereign debt crises (Stepan and Anderson 2014).

Fiscal Discipline (Austerity)

From the 1990s onwards, welfare state restructuring was increasingly driven by new economic ideas, broadly subsumed as a shift from Keynesianism to monetarism (Hall 1993), focused on considerations of competitiveness in a globalized world by means of budgetary rigour (Wueest and Fossati 2015). The idea that “sound” public finance and the reduction of government spending are necessary to guarantee a strong and competitive economy is a core theme in neoliberal discourse. Because social protection accounts for around one-fifth of GDP on average in the EU,² welfare state reforms aiming to reduce costs and spending have been prominent in policy discourses.

In the EU context, fiscal discipline has been a main theme during the march towards the introduction of the common currency. The so-called “Maastricht criteria”

¹ Directive (EU) 2016/2341 of the European Parliament and of the Council of 14 December 2016 on the activities and supervision of institutions for occupational retirement provision (IORPs) (recast).

² Eurostat (2024) General government expenditure in the EU on social protection stood at €3,098 billion or 19.5% of GDP in 2022, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Government_expenditure_on_social_protection#:~:text=In%20the%20EU%20in%202022,relates%20mainly%20to%20pension%20payments. Accessed 8 March 2024.

prefiguring the Stability and Growth Pact enshrined numerical targets for deficit and debt levels, respectively set at 3 percent and 60 percent of GDP. This went hand in hand with the liberal *aggiornamento* of European Social Democracy spearheaded by the then Prime Minister of the UK, Tony Blair, and Germany's Chancellor Gerhard Schröder under the *Third Way* motto. In 1999, the two leaders issued a manifesto urging centre-left governments to reduce taxes, implement reforms in labour and welfare, and foster entrepreneurship (Labour Party 1999). The reforms initiated in this period are particularly relevant for ideational analyses of welfare state reform as they were often contrary to the interests of social democratic voters and modified long-established institutional frameworks, as Larsen and Andersen (2009) demonstrate along the Danish case.

From the 2000s onwards, EU institutions, along with the OECD (e.g., Adema and Ladaique 2009), have continuously produced and spread expertise focusing on European welfare states' cost-efficiency. The EU's OMC constituted a forum dominated by experts and aimed to depoliticize debates. The OMC on pensions, for instance, still reflected tensions between the broad aim of financial sustainability, on one hand, and the principle of adequacy, namely the fact that pensions provide sufficient protection and income to people, on the other (Natali 2009). Economists repeatedly sought to measure the cost-performance ratio of the different types of welfare models in the face of competitive pressure induced by globalization (e.g., Sapir 2006). The constraints implied by globalization and EU integration therefore became an essential component of "the discursive construction of economic imperatives" justifying welfare state reforms (Hay and Rosamond 2002). This had become a "normal" *leitmotif* in EU politics across the board.

The "fiscal discipline" ideational driver gained new traction when austerity prevailed in the financial and sovereign debt crisis of 2008–10, engineered at the EU level. Excessive public spending and the "profligacy" of over-indebted countries infamously rebranded as PIIGS (Portugal, Ireland, Italy, Greece, Spain) became the dominant framing of the Eurocrisis. The logical remedy, then, was an austerity cure. The austeritarian approach was framed as inevitable both by the creditors gathered in the so-called Troika³ (Moreira Ramalho 2020) and by Southern European elites having to justify social hardship vis-à-vis their voters (Borriello 2017). In so doing, they were echoing the "There Is No Alternative" (TINA) discourse championed by the German Chancellor Angela Merkel, caricatured as the "thrifty" Swabian housewife by European media, such as *The Guardian* (Kollewe 2012). The social conditionality enshrined in the Memoranda of Understanding underpinning the bailouts meant drastic welfare retrenchment. Fiscal discipline, though, has not been the appanage of bailout countries. As rules on deficit and debt were made more stringent in

³ The Troika refers to the unofficial alliance of the institutions – namely the European Central Bank, the European Commission, and the International Monetary Fund – acting as creditors when granting loans to indebted countries under Memoranda of Understanding.

2011–12, EU governance enforced fiscal discipline for all. With a renewed emphasis on “structural reforms”, the EU revived the Washington consensus – rebranded Berlin-Washington (Fitoussi and Saraceno 2013) – underpinned by three core ideational components: fiscal discipline, liberalization of product markets and services, and labour market deregulation (Crespy and Vanheuverzwijn, 2019). In the 2010s, austerity and the supremacy of fiscal discipline in political discourses gradually gave way to a new framing, emphasizing Europe’s needs in investment, including social investment (Crespy et al. 2024).

Social Investment

Social investment reflects a paradigmatic shift at several levels, a paradigm being “coherent sets of principles and causal beliefs” which guide policy-making (Béland 2005, p.2). First, it entails conceptualizing social spending not merely as expenditure but as investments producing returns. As such, social investment arguably originates from the neoliberal script by tasking states to think and behave more like businesses (Jenson and Saint-Martin 2003). Second, social investment shifts the role of the welfare state from a passive safety net to an active agent in the face of social risks. Rather than compensating ex-post, social investment is guided by the idea of preventative action whereby citizens are equipped with the tools necessary to face and avoid social risks (Hemerijck and Huguenot-Noël 2022). This is why social investment essentially revolves around “combining creation, mobilization, and maintenance of human capital” (Jenson and Mahon 2022, p.112). In this new conception of the welfare state, education has become a key *social* policy (Solga 2014) (see also Chap. 16), from early childhood education and care (ECEC) through to adult education and training (*life-long learning, up-/reskilling*). Social investment is articulated as a response to so-called new social risks, due to socio-economic transformations and concern, *inter alia*, reconciliation of work and family life or long-term unemployment (Bonoli 2005). These predominantly concern constituencies such as women, youth, or the low-skilled.

As de la Porte and Palier (2022, p.161) demonstrate for the EU context, social investment can be sequenced into several phases. In the late 1990s, the initial phase witnessed the emergence of social investment as a concept linked to harnessing human capital. This involves not only activation but also emphasizing lifelong learning, quality training, and the promotion of quality jobs. Transitioning to the early 2000s, the influence of social investment at the EU level gained strength, extending beyond employment policies to concentrate on both the mobilization and establishment of human capital, for example through a focus on childcare. Ahead and in the aftermath of the Great Recession, the prominence of social investment diminishes markedly on both EU and national political agendas as growth and austerity are emphasized. Interestingly, social investment then evolves as a counter-discourse to austerity and fiscal restraint by Commission actors and a larger epistemic community despite Member States pursuing diverging political priorities. Finally, the European Pillar of Social Rights (EPSR), adopted in 2017, reinforces the social investment

perspective and, in addition, revives a rights-based approach to social policy (Ferrera and Bruno 2023). This is to “significantly [boost] the EU’s social credentials in a time where the EU needs a positive post-crisis narrative...” (Garben 2019, p.126).

Connected to social investment, two interlinked concepts have been particularly prominent discursive elements in welfare reform debates in the EU: activation and flexicurity. Activation essentially aims at the (re-)integration of labour market outsiders, typically young people or the long-term unemployed, by means of targeted measures (such as training). Dominated, at least initially, by a work-first approach (*workfare*), activation gained ground in countries that previously pursued a more social approach to unemployment (Hemerijck and Eichhorst 2009, p.21). Graziano (2012, p.321) investigates convergence in activation policies across Europe and finds “selective EU-induced policy diffusion” with vertical top-down dynamics predominantly identified in countries such as Finland or Italy and horizontal dynamics in Germany and the Netherlands (following the example of the UK). Activation is articulated around the notion of individual responsibility, which is reflected in an increasing conditionalization of welfare. Yet, activation is by no means restricted to employment and is more generally employed to frame welfare state reform commonly centering around more or less loosely defined conceptions of *active citizenship*. For example, Verhoeven and Tonkens (2013) show how British and Dutch governments appeal to feelings of empowerment and responsibility, respectively, to encourage citizen-led provision of social services, in particular, community and elderly care.

Activation is frequently noted alongside and intertwined with flexicurity. Originally developed in the Netherlands but nowadays more strongly associated with Denmark as a result of policy diffusion, flexicurity has been promoted by the Commission from the mid-2000s onwards (Barbier 2014). Essentially, flexicurity aims at a combination of flexible labour markets (facilitating the capacity of employers to react to changing or fluctuating markets) while providing generous social benefits to employees in case of dismissal. Flexicurity has proven particularly attractive as it reassured unions and other socially-minded actors that flexibility of labour markets does not necessarily mean abolishing social protection (Caune 2014, p.56). However, critics of the flexicurity approach have noted that, particularly in the context of austerity, labour market deregulation has been pursued to a much greater extent than social security provision (Keune and Jepsen 2007).

Continuing as a sort of counter-discourse to austerity as discussed above, in early 2024, the Belgian presidency placed social investment at the heart of its six-month “Presidency” of the EU by highlighting its economic returns under the motto of “social investment for resilient economies”.

Resilience

Originating from the natural sciences and popularized as “the ability to bounce back” in psychology, resilience has risen as a buzzword in politics over the past decade. It arguably serves to shape welfare state reform, serving to tilt the balance away from retrenchment towards re-investing in social policy. Rather than depicting them

as besieged under the constraints ensuing from global capitalism, European welfare states are now more often depicted as crucial stabilizers, helping societies to face future challenges and unexpected shocks. Strengthening societies' resilience capacity has become a main task to deal with what politicians, the media, and scholars alike have framed as the successive crises of the EU. The search for resilience has been central in the discursive justification of spending plans in response to the COVID-19 pandemic, on one hand, and the effects of the war in Ukraine on Europeans' purchasing power (notably the rise of energy prices). In 2022, for instance, the French government branded a set of supporting measures for small businesses an "Economic and social resilience plan".

The EU played a central role not only in the spread of resilience as an idea but in its institutionalization as a policy-making paradigm combining a protective with a strategic dimension. Famously, the key financial instrument of the European stimulus package adopted in 2020 was called the Recovery and Resilience Facility. The adoption of the plan has constituted the climax of a change in political discourse away from the primacy of "responsibility" (read hawkish fiscal policy) over the need to show responsiveness vis-à-vis social demands (Crespy et al. 2024). To receive the funds allocated under the Facility, the Member States must submit national recovery and *resilience* plans, which fosters the ownership of the concept among national bureaucratic and political elites. Moreover, researchers found that national plans were to direct a significant part of the money allocated, approximately 30 percent, to social policy spending (Corti and Vesan 2023).

In respect to policy recommendations, the European Commission's Joint Research Center, a unit providing scientific advice and expertise, proclaimed resilience a "new compass for EU policies" in its 2020 Strategic Foresight Report.⁴ The centre's website refers to resilience as a "narrative" and claims that building a more resilient society calls for strengthening the mechanisms of shock absorption and enhancing the capacity for adaptation and transformation. In 2023, a High-Level Group, tasked by the European Commission, published its Report on the Future of Social Protection and of the Welfare State in the EU. The report called for the resilience of welfare states in the face of four structural challenges: demographic change, changing forms of work, digitalization, and climate change. Thus, the resilience frame was used by both scholars (e.g., Hemerijck and Huguenot-Noel 2022) and policy-makers to advocate a recalibration of welfare states that equips societies well enough for dealing with today's social risks.

⁴ European Commission (2020) 2020 Strategic Foresight Report, https://commission.europa.eu/strategy-and-policy/strategic-planning/strategic-foresight/2020-strategic-foresight-report_en. Accessed 8 March 2024.

Critical Outlook

Following a more general trend in political science, ideational approaches to welfare state reform have been flourishing over the past 20 years. With a European focus, this strand of research has overall made three key contributions. Firstly, it has demonstrated that, against the background of institutional stickiness and the long shadow of policy legacies, ideational battles were powerful enough to set processes of change in motion. Hegemonic ideas have served to justify and therefore make possible reforms that were sometimes unpopular and that questioned established distributional equilibria. Secondly, ideational research has shed light on broad processes of change going beyond national idiosyncrasies or types of welfare states. While social models remain diverse across the European continent, a set of key ideas has brought about a certain degree of convergence through the hybridization of different models. Thirdly, ideational approaches have provided evidence on horizontal policy diffusion across countries, due to shared frames and the exchange of “best practices”, in connection with vertical policy diffusion stemming mainly – though not only – from the EU. It is even more relevant that the EU has essentially mainly supporting competences in issues relating to welfare state reform, and more often than not has to play the role of an ideational entrepreneur shaping policy through soft governance.

We reviewed a set of four key policy-guiding ideas which, we argue, have been extensively used to legitimize welfare state reforms. Marketization and fiscal discipline have essentially served to justify retrenchment in pursuit of efficiency gains with the aim of decreasing public spending. After the turn of the twenty-first century, social investment and, more recently, resilience have emerged as key ideational drivers for more progressive recalibration seeking to make European welfare states fit for new social risks such as technological change, climate change, and demographic ageing. Popular resentment towards austerity in the EU and the electoral rise of populist anti-Europeanism in the 2010s, as well as the shock of COVID-19 in the early 2020s, have all contributed to shift European politics from a logic of “responsibility” (narrowly defined as fiscal discipline) to one of “responsiveness” towards social demands (Crespy et al. 2024). The ongoing reform of the EU’s economic governance framework, however, seems to indicate that “permanent austerity” is inescapable.

As to the future, there are promising avenues for ideational research on welfare state reform. Ideational drivers should not be seen as successive, paradigmatic, mutually excluding drivers for reform. Rather, they overlap. Studying the combination and various ideational “blends” seems an important – still unexplored – dimension. Entrepreneurs’ “bricolage” and political compromises lead to policy outcomes combining various ideational drivers. Another relevant aspect is work on ambiguity and polysemy, and how this can facilitate political agreement or, on the contrary, weaken social policy: social investment, for instance, has been seen both as a driver for progressive modernization and as underpinning an economic understanding of social policy. As of today, the idea of “resilience” seems vague enough to be compatible with a wide range of reforms.

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