A Study of the Cultural Explanation of Welfare:

The Effect of Values on Social Policy within the Welfare States

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ABSTRACT

Recent years have seen increasing attention on culture within the school of social policy and the development in theorising the relationship between culture and welfare. However, the cultural analysis of welfare has not been sufficiently supported by empirical evidence. Within the existing research, the causal effect of culture on social policy is either abstract (historical) as the cultural foundations of welfare or nebulous as welfare attitudes which are conversely dependent upon welfare policy. This research aims to find and show the empirical evidence for the effect of culture on social policy.

A critical review of prominent theoretical arguments and empirical work on the relationship between culture and welfare leads us to a conceptualisation of the cultural context for policy making with the societal values which are neither as abstract as the universal human basic values nor as concrete but situation-dependent as public opinion, and of the effect of culture on social policy as twofold: the ex-ante causal effect and the ex-post legitimacy control effect. Drawing on all three waves of European Values Study and corresponding World Values Survey data we attempt to measure the societal values within 22 OECD countries, which are comparable across time and country, equivalently obtainable both at the individual and collective levels and stable over time.

Our data analysis shows that so-called welfare states vary in terms of the cultural context and this variation matter in public opinion on welfare issues and welfare policy decisions. We find that public opinion on the cause of poverty and public attitudes toward policy support for the unemployed are strongly dependent upon the levels of societal values of the corresponding society, and that the level of welfare generosity and welfare policy priorities in terms of the proportion of the welfare budget allocated to different groups and areas are partly predictable by differences in the cultural context. It is suggested that the cultural context has an influence on social policy making. We also find that mothers with children under the age of 5, whose participation in the labour market is strongly supported by family policy, are likely to refer to their traditional family values in making decisions to work. Given that their working would somehow mean their take-up of supports provided by family policy, this implies that their attitudes toward family policy are partly dependent upon their family values. It is suggested that values matter in policy attitudes which are critical not only to the legitimating support of the public for certain policies but also to the take-up/user rate of certain policy instruments.

Drawing on the findings, it is suggested that culture matters in social policy not only theoretically but also empirically, that the effect of culture on welfare policy making can be found both at the before and after stages of decision making from the viewpoint seeing the whole policy process and that, more practically, better understanding of the cultural context of society and values of people would contribute to more effective policy making.

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LIST OF ABBREVIATIONS

AUS   Australia
AUT   Austria
BEL   Belgium
CAN   Canada
DEN   Denmark
FIN   Finland
FRA   France
GER   Germany
GRC   Greece
ICE   Iceland
IRE   Ireland
ITA   Italy
JAP   Japan
LUX   Luxembourg
NET   the Netherlands
NOR   Norway
POR   Portugal
SPA   Spain
SWE   Sweden
SWZ   Switzerland
UK   the United Kingdom
US   the United States of America

OECD   the Organisation for Economic Co-operation and Development

GDP   Gross Domestic Product

ESS   European Social Survey
EVS   European Values Study
ISSP   International Social Survey Programme
WVS   World Values Survey

PCA   Principal Component Analysis
TSCS   Time Series of Cross Sections

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CHAPTER ONE:

INTRODUCTION

Culture has been one of the most popular subjects in the social sciences yet its impact on social policy has been relatively neglected. For example, 'national culture' has been discussed since Caesar's book (Hofstede, 2001: 13). Culture has been referred to as a crucial factor even for differences in economic development between countries which were in very similar conditions before (Harrison & Huntington, 2000: xiii). Within studies of welfare policy, however, culture is seen as either an irrelevant variable to the development of social policy which was the modernist project partly attempting to overcome cultural traditions (Baldock, 1999), or a very marginalised factor like 'the cocktail party and gossip on deck' which does not determine the course of the ship (Schoor, 1984: 403 in Deacon, 2002: 7).

However, culture is central to welfare. The welfare system is based on the shared answers to value-related questions such as why someone should care about others, if so, what kind of others (what is the boundary of others deserving our care), and what and how much should be done. When there seemed to be a post-war consensus on these issues, which was supported by economic growth, culture was not often the subject of concern. But these questions have mattered again since the welfare crisis brought the new scarcity in the 1970s and the 1980s (Freeman & Rustin, 1999: 10-12; Rustin, 1999: 257; van Oorschot, 2007: 130). At the same time, political goals have been forced to change, from credit claiming with expansion of welfare to blame avoidance because of permanent fiscal pressure on welfare retrenchment (Pierson, 1996), which have made cultural dimensions such as public opinion more of a priority for policy makers. Culture is in fact critical in welfare – not only in the development of welfare but also in understanding change and the future of welfare. Recently, there has been rising attention paid to culture within the study of social policy.

In particular, empirical examination of cultural explanation for social policy lags far behind. It has been suggested by recently developed theoretical discussion including the welfare culture approach (Pfau-Effinger, 2005) that policy makers act in economic, political and cultural contexts, and that widely and deeply embedded cultural values form the cultural context for social policy making (van Oorschot, 2006: 24). In spite of such theoretical developments, cultural context and its impact on social policy have rarely been explored successfully by empirical works. The relative lack of cultural data should be blamed here, but the fact that there still seems to be no widely agreed way of conceptualising and measuring the cultural dimension for empirical analysis should also be pointed out. In most existing studies, culture is conceptualised either at the very abstract level (e.g. individualism/collectivism or liberalism/socialism) or at the very concrete level (e.g. public opinion on a specific issue). As a result, culture in these studies is not a context for social policy making but either a foundation of the whole social system or situation-dependent and unstable public opinions/attitudes affected by welfare policy. That is, the effect of culture is either very broad – logically reasoned but not directly proved - or not consistently found.

Our review of relevant literature (Chapter 2) serves not only to clarify such problems but also to examine possible alternatives. In this research, the concept of societal values is suggested as an 'in-between' level cultural dimension. When we can distinguish between three kinds of values which are universal values, societal values and situational values (Haller, 2002: 143), societal values are less abstract than universal values and less concrete than situational values. Societal values may vary across societies more distinctively than universal values which refer to culture as a foundation of the social system. Societal values would have wider and deeper ground within a society and be more stable than situational values which refer to public opinion/attitudes. It is assumed that societal values are shared by most members of a society and, if aggregated, form the cultural context of each society for social policy making. This 'in-between' level cultural dimension facilitates the conceptualisation of a twofold effect of culture on social policy: cultural context (aggregated societal values) has causal influence on social policy making through its affect on public opinion on relevant issues; and societal values have

impact on the degree of public support for a specific policy by affecting individual evaluative attitudes toward that policy. If the former can be called the ex-ante (before side of policy making) effect of culture, the latter would be the ex-post (after side of decision making) effect of culture on social policy (cf. van Oorschot, 2007: 134-135).

Six examples of societal values are presented through exploratory data analysis (Chapter 4). Data on people's values, drawn from all three waves of the European Values Study and corresponding World Values Survey data, for two decades within 22 OECD countries are analysed. Societal values should not be as abstract as the basic human values, but should be quite stable over time. Particularly, it is our concern that societal values comparable between countries and testable for stability must be based on the same notions across time and space. Our examination shows that not only space but also time matters in people's notions, which are rarely inspected empirically. Notions involved in understanding a specific question or in forming specific values can change over time as well as vary across societies. The six societal values here are based on similar notions regardless of country and time, with differences between societies that are quite stable over time.

We show that 'the ex-ante causal effect' of culture on social policy making can be supported by empirical evidence (Chapter 6). Our data analysis focuses on issues related to the basic welfare question of who should get what and why, and suggests multiple findings: public perception of the cause of poverty (why) and public support for welfare policy on the unemployed (who) are dependent upon societal values; societal values can partly explain the level of welfare effort and welfare generosity (what); and welfare policy priority, especially welfare budgetary allocation to unemployment (who) is also partly dependent upon societal values. In addition, it is shown that there can be empirical support for 'the ex-post legitimacy control effect' of culture on social policy (Chapter 7). It is reasoned that people's negative attitudes to a concrete policy can lead to either 'active resistance' or 'passive resistance'. When people's material interests are expected to be violated seriously, they may actively resist to the policy through, for example, petitions and demonstrations. When people find they just cannot approve a policy as

much because of, for example, a certain gap between their values and the policy, they will resist the policy passively. We assume that non-take-up of entitled benefits/services is a way of passive resistance. According to our data, mothers appear to refer to their traditional family values when they make decisions to work. Mothers who have stronger traditional family values are less likely to work, especially those who live in countries highly supportive of their employment through family policy – their decision to take up support offered by family policy appears to be partly dependent upon their values.

On the whole, it is found that the conception of culture at the in-between level can be fruitful for the empirical examination of the relationship between culture and social policy. Given that culture is such a broad and multifaceted concept, and that both abstract and concrete conceptions of culture have not facilitated much empirical work, the cultural analysis of welfare would benefit from such attempts to conceptualise and measure culture at a different level. At the same time, the twofold effect of culture on social policy has rarely been differentiated and conceptualised clearly and investigated empirically (cf. van Oorschot, 2007: 134-135). The ex-post effect of culture appears to be an especially promising subject with many practical implications for successful policy-making.

This thesis will proceed as follows. Prominent theoretical arguments and empirical work about the relation between culture and social policy are reviewed in the next chapter (Chapter 2). This review leads to a theoretical framework for our cultural analysis of welfare, to a conception of culture expected to be more fruitful for the empirical examination of the effect of culture, and to a twofold conceptualisation of how culture affects social policy. A discussion about methodological issues follows (Chapter 3). It appears that studying culture in particular requires consideration of epistemological and ontological standpoints. Data and methods for drawing our cultural variables – societal values - are also introduced and examined. The four analysis chapters (from Chapter 4 to Chapter 7), placed next to this, are attempts to ascertain the effect of culture on social policy: analysis of values data to extract examples of societal values; an analytic review of these societal values to examine their validity; analysis of the causal effect of culture

on social policy making; and analysis of the legitimacy control effect of culture on social policy. The last two of these have a short introduction of data, methods, and operationalisation applied in each analysis. Finally, a discussion chapter (Chapter 8) about the research findings and policy implications as well as limitations of this research, followed by a conclusion (Chapter 9), will bring this thesis to a close.

Generally, advocates of cultural explanations for social policy do not argue that culture is a decisive factor. This does not mean, however, that the role of culture is merely peripheral. We believe that there must be room for culture in understanding and explaining every subject of the social sciences, in which people (social actors) are intrinsically involved, who are all different and not always logical and rational. Culture is about such differences – looking at culture is 'signifying issues of diversity and differences' (Clarke, 2004: 31). Instead, we argue that we need to take an 'eclectic' approach to have an 'open-minded and balanced understanding of the contemporary welfare state' (Hudson & Lowe, 2004: 6, 246). Cultural analysis would, we expect, enrich study of social policy – hopefully, this research will be an example.

CHAPTER TWO:

EXPLAINING WELFARE WITH CULTURE

2.1 Introduction

Culture is found at multiple levels. We see culture in the values individuals hold, in a group, region, and country, and even globally. Culture is also a multifaceted concept. The scope of phenomena which can be referred to as 'culture' is very wide and includes attitudes, rituals, languages and religions. This feature has facilitated multiple conceptions of culture – in other words, there is no clear definition (e.g. Freeman & Rustin, 1999: 13). Cultural theories have existed at different levels (the macro, meso and micro levels) focusing on different aspects of certain human groups as holders of culture. As a result, there have always been conflicting, if not contradictory, arguments on culture from the most sceptical (culture explains nothing) to the most ambitious (culture explains all) one. This implies that it would be more important for a cultural study to be placed firmly and explicitly on a theoretical framework with a clear conception of culture - the task which will be dealt with in this chapter.

The existing works on the relation between culture and welfare are reviewed here. As expected, these studies are based on different conceptions of culture, which shows a lack of agreed systematic theories about how culture is related to social policy making. We benefit from the welfare culture approach (Pfau-Effinger, 2005; van Oorschot, Opielka & Pfau-Effinger, 2008). While this approach offers a theoretical framework for the cultural explanation of welfare, review of the literature shows there can be a cultural dimension more desirable, if not appropriate, for the aim of each research. It is suggested that there is an 'in-between' level of values – societal values which are less abstract than the basic human values as well as less concrete than public opinion on particular issues, for attempts to find empirical evidence of the causal effect of culture on social policy making. Based on this conception of culture, the twofold effect of culture on social

policy can be elaborated and hypothesised: the ex-ante causal effect and the ex-post legitimacy effect. The chapter is structured in such an order.

2.2 Does Culture Matter in Social Policy?

"There is no escape from value choices in welfare systems. […] anything to do with 'policy' must inevitably be concerned with 'what is and what might be'; with what we (as members of a society) want (the ends); and with how we get there (the means)" (Titmuss, 1974: 132).

That culture matters is not at all a new argument. Since any kind of human collectivity is inseparable from the concept of culture, it is something quite commonly said, and regarded as intuitively acceptable. Within academia, where intuition cannot be satisfactory of course, culture is one of the subjects which have attracted the widest attention and its study has a long history (Hofstede, 2001: 13): for example, it is suggested that traditional religious values have an 'enduring influence on the institutions' of a society (Weber, 1904 in Inglehart & Baker, 2000: 22); Kavanagh (1972) emphasises the significance of cultural factors in explaining dissimilar levels of democratisation and the degree of 'democraticness'; and for Giddens (2002: 72-78), sustainable democracy requires 'deepening' or 'democratising' of democracy, which depends upon 'fostering of a strong civic culture', for example, by encouraging tolerance. In addition, culture is seen to be a factor in corruption (Lipset & Lenz, 2000) and economic development (Beugelsdijk & Noorderhaven, 2003; Grondona, 2000).

Yet the cultural dimension is particularly central to welfare (Rustin, 1999: 257). Welfare (policy/system/states) is basically (choices) about what constitutes the 'good society' and how to achieve it, which reflects diverse understanding of human nature (Deacon, 2002: 1; Titmuss, 1974: 49; van Oorschot, Opielka & Pfau-Effinger, 2008: 2). For an early example, Titmuss (1958: 18-21) contends that the English Poor Law in 19th and the early 20th century is based on behavioural norms reflecting (the middle class') ideas about the nature of man at that moment. Marshall (1972: 18-19) argues that welfare decisions are different from political and economic decisions which are made through

the 'egotistic' majority vote and the market mechanism respectively, since welfare is not simply reacting to or obeying 'expressed desires' but satisfying 'needs'. Welfare decisions are based on consensus of (ethical) value (Marshall, 1972: 20), in other words, on the shared answer to the (moral) question of 'who should get what and why' (e.g. van Oorschot, 2000), which is not produced by the market or ballot. Thus, for example, the change in the British social policy from the Thatcher government, which has been in some respects continued in the New Labour government, is understood as being prompted by the new normative consensus on the 'post-welfare' social policy – 'welfare provision must be conditional upon economic performance' (Ellison, 1998: 35).

2.2.1 Cultural explanation – the early examples

Not surprisingly, therefore, there have been attempts to account for the development of welfare by looking at changes in cultural dimensions such as ideologies, attitudes and values. Even with the early stage of welfare development before the World Wars, for instance, Evans (1978: 1) asserts that "[t]he history of British social policy between 1830 and 1914 is a history of changing attitudes to the role of the State". According to him, the general view on government intervention changes from individualism to collectivism during this period paving the way for post-war welfarism (also see Thane, 1982). In the age of *laissez-faire,* when individualism was dominant – loosely from 1830 to 1870, the proper role of government was generally seen as being a marginalised safeguard preserving the viability of *laissez-faire*. Then this view changes to a more collectivist one - the state should provide the positive good (e.g. minimum standards of health, old-age living, housing, education, or/and unemployment support) – with the impact of studies of poverty (e.g. those by Charles Booth and Seebohm Rowntree). Finally, between 1895 and 1914 collectivism was further strengthened, especially by the Liberal reforms of the Edwardian era, which widened the range of government's social responsibilities even though these were very limited in terms of institutionalisation (Evans, 1978: 1-17).

While it is a popular thesis, offered by Titmuss (Baldock, 1999: 468; Thane, 1982: 223) and sympathised with many (e.g. Townsend, 2009 [1958]: 147), that the emergence of

the British post-war welfare state was predicated on the much increased social solidarity of the war-time experience, it is also attempted to explain the great expansion of welfare between the 1950s and the early 1970s with value change (Robertson, 1980). Robertson argues that there has been a change in values in Western society since the Second World War, especially with the impact of both the growth of consumer industries and application of Keynesian policies. Contrasting with the values in a pre-Keynesian economy, which functioned according to the notion of scarcity and insecurity, 'post-industrial' values emphasise expressing, developing and fulfilling individual potential. These post-industrial values have emerged and led to a qualitative expansion of the concept of 'welfare': from the material to the psychological sphere; from the 'minimalist' to 'maximalist' concept; and from 'residual' to 'institutional' provision (1980: 15-19).

These explanations, however, appear to be insightful but are not so analytic. They show that culture does matter in social policy, but do not tell us why, how, how strongly and in which concrete policies it matters. Thus, for example, even 'the paradigm case' of the direct effect of cultural change on social policy - increased solidarity because of the war-experience leading to the post-war Welfare State - has been challenged: there was already public and official concern about the needs for welfare before the war; the wartime social policy reforms were more a political necessity to meet the war emergency than the result of social solidarity (Baldock, 1999: 466-468; Thane, 1982: 223-269). From another point of view, this broad conception of culture may lead to relatively less concern about detailed explanations of the process through which culture affects social policy making. Explicitly or implicitly in these studies, culture is seen as the general and fundamental force influencing almost all human preferences and acts of choice. Without caution, then, it can sound like saying 'culture explains all', which is a somewhat vacuous argument. This does not mean that their conception is wrong or their explanations are useless. What we intend to say is, instead, whilst these attempts make a valuable contribution to our understanding of the cultural foundations of welfare, there can be various conceptions of culture, each of which would enable different cultural approaches to be pursued. When our aim of this research is an empirical examination of

the effect of culture on social policy, there is a more desirable, if not appropriate, approach – we will turn to this shortly (Section 2.3). Before that, a brief review of why cultural analysis in social policy has recently attracted wider attention may show the centrality of culture to welfare more clearly.

2.2.2 The rise of culture

In general, however, attention on culture within the school of social policy has been marginalised (Baldock, 1999: 460).[1] Only recently has there been an increasing interest in the cultural analysis of welfare (van Oorschot, 2007: 129-130). The impact of the so-called 'cultural turn' in the social sciences in the 1970s, the welfare crisis, increased (demand for) international comparative research on social policy, enlarged methodological possibilities due to the development of cross-national attitudinal surveys, and *The Three Worlds of Welfare Capitalism*'s (Esping-Andersen, 1990) stimulation, and so on are suggested in common as the causes of the rise of culture as a subject in the field (Freeman, 1999: 91-92; van Oorschot, Opielka & Pfau-Effinger, 2008: 3-9). Welfare crisis is of particular concern here, since it not only contributed partly to the rise of other causes above, but is also more relevant to the fact that culture does matter in welfare.

As it is widely known, the welfare crisis was ignited by the end of the golden age of the welfare state in the mid-1970s following the oil price shock. Permanent austerity began to be the alarm. It was 'not just economic trouble' - the welfare state itself as 'a formula' was in question (Finer, 1999: 22-23). Welfare reform/retrenchment, or 'the transition from the traditional industrial to the post-industrial' welfare settlement, started (Taylor-Gooby, 2008: 168). Altered situations could be characterised with, for example, fiscal austerity, increasing long-term unemployment and part-time work, population aging, lowered fertility rate, and the collapse of the traditional family formation, and so on.

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[1] According to Baldock (1999) this is natural since the development of social policy in the 20th century was a 'modernist project' irrelevant to (traditional) culture. However, political elites (modernists in his argument) themselves are the 'reflection of the broader society' (Montaner, 2000: 58) and not free from wider culture. Instead, a better explanation of the reason why cultural studies have been few and far between is that the existence of the post-war consensus did not prompt much discussion on cultural issues in welfare, as we will see below.

There were no easy answers but a need for examples and lessons. All of these led to a great increase in research on welfare states including cross-national comparative studies in the 1980s. It was revealed, as a result, that welfare states were distinct from one another not only quantitatively but also qualitatively – in their ends as well as means. In this context, 'contrasting putative types of welfare state' started to be discussed (Finer, 1999: 23-24): for a very representative example, see *The Three Worlds of Welfare Capitalism* by Esping-Andersen (1990).[2]

To put such a seminal work briefly, Esping-Andersen starts with the fact that important structural aspects of welfare states such as disproportionate provisions between social groups and classes, and different ways of means-testing and of tax expenditure through tax privileges, have rarely been illuminated in studies focusing on welfare expenditures. Drawing on Marshall, especially the idea and concept of 'the rights of social citizenship' (1950 in Esping-Andersen, 1990: 21-23, 36, 55, 58; also see Marshall, 1992 [1950]), he argues that de-commodification and stratification are central features of the welfare state. If social rights, including rights to survive outside the market, are given on the basis of citizenship rather than performance, welfare states should respond to pressures for de-commodification of people themselves (their labour power). De-commodification is also necessary for system survival: capitalism's drive to commodify labour is 'sowing the seeds of self-destruction' which would happen with the complete commodification of labour power (Polany, 1944 in Esping-Andersen, 1990: 36-37). Responses to this de-commodification pressure would vary according to different historical legacies: conservatism; liberalism; and socialism. The welfare state is also a system of stratification - for example, means-tested benefits can promote social dualism. Whilst the welfare state helps to erode the salience of class by de-commodification, it also generates 'status competition' (Parkin, 1979 in ibid: 55). That is, different welfare systems have different impacts on social stratification as they affect social structures differently.

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[2] As an earlier example, Titmuss suggests three categories of welfare states (from Alcock, 2001: 17) as follows: 1) Residual welfare systems – where provision is available on a 'casualty' basis only to those who cannot be expected to provide for themselves; 2) Individual achievement systems – where needs are met through involvement in the labour market and through work-related welfare measures; 3) Institutional redistributive systems – where universal services are provided for all.

Esping-Andersen's arguments are supported by his empirical findings. Examination of the degree of his de-commodification index shows there can be three clusters of welfare states. These three clusters are also distinctive in welfare programme attributes by his stratification indices (ibid: 47-78). As a result, he suggests the well-known three welfare regime-types and the distinctive features of each regime (ibid: 26-29):

1) The liberal regime: traditional and liberal work-ethic norms; means-tested modest benefits; encouraging market; relative equality of poverty among state-welfare recipients; market-differentiated welfare; and class-political dualism.

2) The conservative/corporative regime: preservation of status differentials and traditional family-hood; marginal role of private insurance; little emphasis on redistribution; and principle of subsidiarity.

3) The social democratic regime: universalism; equality of the highest standards; fusion of liberalism and socialism; state's responsibility for family needs; and fusion of welfare and work (to sustain such a generous welfare system).

Let us turn to the point relevant to cultural analysis leaving more detailed discussion on *The Three Worlds* and the welfare regime theory to the ample works already out there (e.g. see Arts & Gelissen, 2002; Bambra, 2006; Esping-Andersen, 1997; Scruggs & Allan, 2006). *The Three Worlds* illuminated the fact that there were, beyond simple differences between welfare states, systematic and structural forces influencing the development of diverse welfare. Stimulated by this, cross-national variations of welfare and its determinants were widely analysed (Alcock, 2001: 19; Cochrane, Clarke & Gerwirtz, 2001: 11; Mabbett & Bolderson, 1999: 44). For instance, gender and cultural dimensions such as familialism started to gain more attention (Lewis, 1992 in Alcock, 2001: 19; Arts & Gelissen, 2002: 148; Cochrane, Clarke & Gerwirtz, 2001: 15). Esping-Andersen himself suggested (1990: 21-34) that social policy in each regime type was 'circumscribed' by cultural dimensions, such as traditional and liberal work-ethic norms (the Liberal regime) and the strong effect of the Church and emphasis on the preservation of traditional family-hood (the Conservative regime). In fact, culture cannot

be missed when certain differences between human collectivities (e.g. countries) are discussed - looking at culture is 'signifying issues of diversity and differences' (Clarke, 2004: 31). That is, although the regime theory did not focus on culture, it fostered cultural study (Lin, 1999: 21-2 in Opielka, 2008: 101).

Beyond this, the welfare crisis in itself reminds us that culture is crucial to welfare. Welfare is, as discussed before, 'not a closed system for a particular group decided by power elite' (Titmuss, 1974: 136) but founded upon consensus (Marshall, 1972: 20; Rustin, 1999: 260-261). When individual welfare needs were met or expected to be met to a substantial degree, there was either the post-war consensus or at least a tacit agreement between possibly conflicting ideas and values. When this was not the case anymore, in other words, when 'the new scarcity' came, everything which had seemed to be self-evident was in doubt, and 'deep uncertainties' were left – for instance, why we should care about others, and if we should, what kind of others (what is the boundary of others deserving our care), what should be done, and what is possible? 'Cultural issues' of welfare, or the basic moral welfare question of who should get what and why, were brought to the fore again. If welfare had developed differently, and it has changed especially since the crisis with differing answers to these cultural questions, we would need to know about culture to better understand welfare (Freeman, 1999: 91-92; Freeman & Rustin, 1999: 12; van Oorschot, 2007: 130; van Oorschot, Opielka & Pfau-Effinger, 2008: 5-7).

It is not surprising, therefore, that there has been increasing attention paid to culture within (comparative) social policy analysis, although studies on the relation between culture and welfare are still underdeveloped (van Oorschot, 2007: 129-130). If culture matters in welfare, our next question is, how does culture matter? As it was mentioned above, there can be and have been different approaches to pursuing cultural explanations of welfare, mainly due to the fact that culture is itself a very broad and complex concept. Examples below from the few existing studies show how the relation between culture and welfare has been conceptualised and examined, leading us to a theoretical

framework for that relation – the welfare culture approach (Pfau-Effinger, 2005; van Oorschot, Opielka & Pfau-Effinger, 2008: 10-11).

2.3 How Does Culture Matter in Social Policy?

Existing research on the relation between culture and social policy can be grouped roughly into three categories by the way culture is conceptualised. Firstly, culture is seen as a general background force influencing the entire society. Secondly, culture is conceptualised narrowly as a variable dependent upon social policy. Finally, public opinion/attitudes are seen as cultural dimensions more closely and concretely related to social policy making. In addition to these, there is also another perspective which emphasises policy recipients' viewpoints, although cultural analysis of social policy from this perspective is too underdeveloped to form another category. We review the existing work on the cultural dimension by each way of conceptualisation, which will lead us to discussion about a more desirable theoretical framework for empirical cultural analysis of welfare.

2.3.1 Culture as a general and foundational force

Cultural and ideological traditions have been seen as a background force confining or directing policy decisions to ways which are in accordance or compatible with, and/or reinforce those cultural traditions and ideologies. The early attempts at cultural explanation we saw above are also examples of this approach. In particular, the impact on (the growth of) welfare of the quintessential Western ideologies developed in modern times – i.e. liberalism (individualism), conservatism (hierarchism) and socialism (social democratic ideas, egalitarianism) – has been widely discussed. As it is well known, Esping-Andersen's (1990) three welfare regimes are also based on these three distinctive ideological traditions. He explains how dealing with the two fundamental issues of social policy - de-commodification and social stratification of each welfare regime type - has been circumscribed by these ideological traditions. Van Kersbergen and Kremer (2008) focus on how conservatism has confined the responses of Continental countries to the necessity for social intervention. According to van Kersbergen and Kremer, while

conservatism itself has no set of ideas about the good society as a historically developed criticism of both social democratic and liberal ideals (the good society), conservative social policy has aimed to preserve paternalistic, organic and hierarchical social status and order. In the key feature of recently changed gender policy (childcare provision policy) in Belgium and the Netherlands, an emphasis on intergenerational care (between grandmothers, mothers and daughters/sons) and on 'part-time' working of mothers respectively, they see the influence of the ideological tradition of conservatism in both countries.

Whilst examining the impact of one particular ideological tradition predominant in a certain group of welfare states is fruitful for highlighting how a specific ideological background has circumscribed the development of social policy, it can lead to discussion about prototypes as does the regime theory. In reality, all three ideologies have influenced the development of welfare across the Western welfare states but disproportionately (van Oorschot, Opielka & Pfau-Effinger, 2008: 12). For example, O'Connor and Robinson (2008) show the influence of the liberal idea on the development of not only the liberal but also all types of welfare states. While liberalism has varied over time, they argue, from classical through new (social) to neo liberalism,[3] 'social' liberalism in the early 20th century especially left its mark on all welfare regimes with 'the rights-based approach to citizenship' which is the core element of all welfare states. More recently, according to them, neo-liberal thinking emphasising obligations in social rights is partly responsible for the contractualism which has spread across welfare states.

In Stjernø's historical, conceptual and empirical analysis (Stjernø, 2008) of party platforms and programmes, we can see how socialist ideas have been adopted and developed as basic values of Social Democratic parties including the British Labour party across Western welfare states. It is also interesting to see the mutual impact between those ideologies of liberalism, socialism and conservatism, which can be found

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[3] According to O'Connor and Robinson liberalism has changed with the same but differently emphasised structure of four core tenets - individualism, moral egalitarianism, universalism (anti-particularism) and meliorism.

in the historical path of changing social democratic values. For example, it can be conjectured from Stjernø's description of the development of the socialist concept of freedom that the socialist concept of freedom 'to (enjoy a decent life)' emphasising a material base as a prerequisite may have affected the concept of 'positive freedom' of the New (social) liberals in the early 20th century (O'Connor & Robinson, 2008: 34). He also maintains that both neo-liberalism's particular concern for 'each one' (if summarily but crudely put, personal freedom to choose) and the emphasis in Christian democratic ideas on 'contribution' have influenced social democratic values – for example, 'just redistribution' on which the social democratic concept of justice mainly focused in the past has conceded its place to others like equal opportunity.

The impact of religions, especially of Christianity,[4] on the historical process of European welfare state construction has also been a popular subject (van Oorschot, Opielka & Pfau-Effinger, 2008: 12). For example, while he has repeatedly found there are four distinctive 'families of nations'[5] similar to Esping-Andersen's typology (Castles, 1998; also see Castles & Mitchell, 1993) Castles also finds that those four families of nations show clear differences in the degree of religious dominance of Catholicism and political incumbency of Christian Democratic parties between 1950 and the early 1990s. Protestant dominance with no Christian Democratic Party incumbency, Lutheranism dominance with marginal incumbency, Catholicism dominance with a large portion of cabinet seats held by Christian Democratic parties, and Catholicism dominance with almost no cabinet seats during the period are assigned respectively to the English-speaking, Scandinavian, Continental Western European and Southern European family of nations. With this finding he suggests plausible explanations for variations in welfare such as more positive attitudes to state intervention in Scandinavian countries and both ideas of 'active Church and subsidiarity by social policy' and of 'just wage' for the male-breadwinner in Continental and Southern European countries, although such a

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[4] This is because until recently the focus has been on Western welfare states within comparative study of welfare, as countries sharing comparable level of state welfare as well as economic development.
[5] Those are: English-speaking family (Australia, Canada, Ireland, New Zealand, the UK and the USA); Scandinavian or Nordic family (Denmark, Finland, Norway and Sweden); Continental Western European family (Austria, Belgium, France, Germany, Italy and the Netherlands); and Southern European family (Greece, Portugal and Spain).

causal explanation requires further empirical support, as the author admitted (1998: 52-58). The effect of Catholicism on welfare is more intensively studied by van Kersbergen (1995). According to him, in Continental Western Europe where Christian Democratic parties have been dominant, Christian democracy instead of Social democracy (socialist movement) can explain better the development of the welfare state (1995: 23-26). Christian democratic politics has been a 'politics of mediation' pursuing social integration for 'the natural and organic harmony of society' through 'accommodation' and reconciliation of conflicting social interests, he argues (1995: 28-29). The distinctive characteristics of Christian democratic politics have led to 'the Christian democratisation of capitalism' - or what he calls 'the social capitalism' - which of course varies to some degree between countries with different historical, social and economic contexts (1995, especially, Chapter 4 and 8).

Beyond discussion about the impact of Christianity on the Western welfare states, Opielka (2008) attempts to understand the world of welfare through the typology of religions. Drawing on the sociology of religion, and from the historical institutionalist perspective (or according to him, 'cultural institutionalism'), he heightens and broadens the concept of religion as 'the theory and practice of ultimate values' which are foundations of differing social systems across the world ('a thick definition of religion'). Lockhart (2001) seems to share this standpoint of cultural institutionalism. Whilst the institutional approach has greatly contributed to understanding of current institutional differences, according to him, the need for cultural analysis arises when the origins of such institutional differences cannot be explained by institutions themselves. The basic line of his reasoning is clear: distinctive values and beliefs shape social actors' preferences differently; these distinctive preferences shape institutional design preferences (or 'institutional formation imperatives' he calls) differently; and distinctive institutional design preferences lead to different structuring of the broadest societal institutions which confine the character of the narrower institutions they contain (2001: ix-xi). Drawing on four cultural types of the grid-group theory,[6] interestingly, he

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[6] In this theory, any culture is understood with varying degrees in two dimensions, the legitimacy of external prescription (grid) and the strength of affiliation with others (group). As a result, there emerge four combinations (value-clusters): Hierarchy (strong in both dimensions); Individualism (weak in both

describes how personal institutional preferences are formed by socialisation (interaction with his experiences and surrounding culture) with four examples - Reagan, Gorbachev, Kohl, and Shigeru (2001: 27-59). Then he can partly explain why individualistic (the US) and hierarchical (the Soviet Union and the Federal Republic of Germany) countries responded differently in the 1980s to the pressures on public protection for the elderly - benefit cuts (the US case) were favoured by individualists, while policy changes were marginal in hierarchical countries (2001: 121-215).[7]

What the cultural explanations above have in common is that their conception of culture and, as a result, conception of the effect of culture is broad and comprehensive. A certain cultural (ideological) tradition predominant in a particular society or group of societies is understood as being able to characterise that society or group of societies in general (at a certain moment). Particular cultural, ideological or religious traditions are conceptualised as having (partly) shaped not only social policy but also broader social structures as general underlying forces. In this, culture is regarded as being able to explain the origins of both institutional differences and personal preferences, for which institutionalism and rational theory have struggled to account. However, as we discussed before (Section 2.2.1), as our conception of culture becomes broader, the bigger the risk is that cultural explanations become somewhat abstract. At the same time, since cultural distinctiveness is often conceptualised based on just one or two dimensions, the complexity of the real world may not be reflected sufficiently (Lockhart, 2001: 227-228). Put differently, whilst our understanding of the cultural foundations of welfare is improved substantially by this approach, the concrete role of culture is not so clearly illuminated. This is another reason why we should be cautious not to create '*post hoc* explanation' especially in this approach (Stjernø, 2008: 55). Also, the political elite – mostly implicitly but sometimes explicitly (e.g. Lockhart, 2001) - tend to be given more

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dimensions); Egalitarianism (strong only in group dimension); and Fatalism (strong only in grid dimension) (Lockhart, 2001: 6-8).

[7] Benefit reduction was resisted in the hierarchical Soviet Union in spite of stronger situational pressures and an individualistic leader, Gorbachev (Lockhart, 2001: 143-167). The Japanese case was not fit for this explanation, as the hierarchism predominant Japanese government cut the pension benefit without raising revenue in 1985 (Lockhart, 2001: 193-215).

attention within this approach to link the (abstract) impact of culture with the concrete phenomena of policy change.

In this respect, Lin's attempt (2005) to find cultural traditions appears distinct. He tries to abstract certain cultural traditions of Scandinavian countries by surveying the historical facts of its institutional tradition through the method of 'analytical narrative'. For example, from the history of political institutions, he finds traditions of 'political obedience' (from trust in the state authorities), 'secularisation' (Lutheranism) and 'corporatism' (strong assembly), which may have supported the ideas about statism and democracy. From the history of economic institutions and social classes, he extracts traditions of 'freedom and individual autonomy' (from strong free farmers), 'social equality' (from no crystallised social hierarchy by overwhelming poverty) and less orientation to 'patriarchy, paternalism and clientelism' (especially from weak feudal structure). Finally, at the 'grassroots level', he sees weak traditions of both familism and patriarchy. In the Scandinavian societies, the size of a family was limited (traditionally and even by law) and families lacked 'communal force' to produce sufficient welfare. Instead, public assistance by churches was common and familiar, which implies the embodied demand for public welfare. With these cultural traditions, he explains well-known distinctive characteristics of the Scandinavian social policy model, such as high tax rate and degree of system integration, highly popular notions of social justice, welfare rights and social citizenship, and substantial welfare spending. He has also showed elsewhere that the cultural traditions of Scandinavian countries created certain preconditions for the development of Scandinavian family policy (see Lin & Rantalaiho, 2003). [8] Though the validity of his abstraction of certain traditions from selected historical facts is controversial, in his studies the level of conception of culture (cultural tradition) is lowered, which enables us to access both various cultural ideas beyond social elites' dominant ideologies as well as concrete ideas about how culture may affect welfare.

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[8] It was a comparative case study of Scandinavian and Confucian Asian countries.

2.3.2 Culture as a dependent variable

Social changes since the mid-1970s such as the rapid increase of the long-term unemployment, insecure part-time jobs and single parent families have led to 'the new poor'. Unfortunately, their welfare needs have been criticised by governments which have also been suffering from continual recessions - especially by the 'new right' governments in the US and the UK. In this context, the 'dependency culture' thesis was developed in the late 1980s, of which the basic idea was that 'misplaced generosity' nourishes and sustains the dependency culture of poor people (Dean & Taylor-Gooby, 1992: 1-25). Since then, there has been much debate over the moral effect of welfare. If unemployment benefit destroys, for example, the work ethic of 'the taker', then 'the giver' would see takers as less deserving and as a result the legitimacy base of the unemployment benefit would be called into question. This theory can be widened to the general public beyond the poor. According to Heinemann (2007) who draws on Lindbeck and Sugden, if more generous welfare provision is introduced people may firstly find receiving such a benefit uncomfortable because of the established norms they have, but later some would start to go against the grain and get more. Imitators then follow and finally a 'critical mass' of people may approve new 'welfare state norms' at a particular moment. Through this process, the erosion of social norms can happen in the long run because of the welfare state's generosity (2007: 6-7). In their concern for this, studies about the moral effect of welfare, in fact, are about the 'cultural base' of welfare from a different point of view.

Empirically, Heinemann (2007) tests the moral decay thesis and finds that there is a general tendency towards the eroding of 'benefit morale' – the willingness to forego not entitled benefits[9] – within 30 OECD countries for 20 years from 1981 to 2000.[10] Furthermore, he claims that the degree of individual benefit morale is explained partly by the change in welfare spending – it seems that benefit morale decreases as social security spending increases. By analysis of 15 Western European welfare states (Arts, Halman & van Oorschot, 2003)[11] Arts and his colleagues report that the welfare state

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[9] It was measured based on one survey question about whether claiming government benefits to which the respondent is not entitled is never justifiable (1), always justifiable (10) or in-between.

[10] This analysis was based on all three waves of EVS and the four waves of WVS data.

[11] This study used the EVS 1999/2000 data.

effort[12] has a negative effect on individual civic morality,[13] although their other findings are mostly not in accordance with the moral corruption thesis. They also find that 'informal solidarity'[14] is weak among people in countries with a larger welfare effort, which supports the 'crowding out' effect (or the trade-off pattern) of welfare - people become less concerned about the needy as the state takes more responsibilities for them (also see van Oorschot, Arts & Halman, 2005).

However, this moral decay thesis is criticised as mostly 'normative and being based on theoretical conjectures, anecdotal evidence and *ad hoc* interpretations' (van Oorschot, 2007: 132). According to van Oorschot's review of existing empirical studies (2007: 132) there has rarely been any disruptive effect of welfare on solidarity, work ethic and community spirit, contrary to those pessimistic but theoretical critiques. In fact, in an analysis based on the 1989 British Social Attitudes Survey, the unemployed group and the single parent group, who are widely viewed as being inclined towards a culture of dependency, are reported to be sharing 'the mainstream values' of the population – on whether welfare undermines self-help and mutual aid, and whether social security provision is being offered to undeserving groups (Dean & Taylor-Gooby, 1992: 75-78). In addition, the 'crowding out' effect of welfare, especially on social capital (such as interpersonal trust, trust in social institutions, and trustworthiness), is challenged at the country level by both analysis of nine advanced welfare states during two decades (Patulny, 2004)[15] and analysis of 23 countries (van Oorschot & Arts, 2005).[16] In the latter analysis, such an effect is found only in the degree of individual trustworthiness.[17]

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[12] It was measured by the proportion of GDP spent on welfare.

[13] It was measured by factor analysis of four items: to what degree it can be justified (10-point scale from 'never' to 'always'); 1) claiming state benefits which one is not entitled to; 2) cheating on tax if one has the chance; 3) accepting a bribe in the course of one's duties; and 4) paying cash for services to avoid taxes.

[14] Respondents' informal solidarity with three different welfare needy groups (the disabled and old, the unemployed, and immigrants) was measured separately based on four items: to what extent a respondent felt concerned about the living conditions of: 1) the elderly and the sick and disabled; 2) the unemployed; 3) immigrants (5-point scale from 'very much' to 'not at all').

[15] This study is based on the four waves of WVS data.

[16] This analysis is based on the EVS 1999/2000 data.

[17] Trustworthiness was measured with four items of which three were identical to those for 'civic morality' in Arts and his colleagues' work (Arts, Halman & van Oorschot, 2003) seen above. We might have to say that the moral corruption effect of welfare albeit partly was again presented.

The welfare moral effect thesis appears to have a long tradition, especially in the liberalist point of view - there is a potential risk with welfare because of the authoritarian (paternalistic) character intrinsic to welfare, which can weaken self-reliance and threaten 'the values of freedom and independence' (Marshall, 1972: 25). If we take this logic a bit further, then all perspectives on welfare sharing the view that social policy aims at the moral and attitudinal change of people (e.g. modern communitarianism which is linked to the 1990s 'third way') may not be free from this 'moral decay' thesis (see Deacon, 2002; van Oorschot, 2007: 132-133). From our point of view, however, an argument that social policy can change culture and should have such an aim sounds compatible with a claim that we should try to promote more a pro-economic development culture (e.g. Harrison, 2000). We do not deny the idea that culture is affected by the social system, but we think culture is 'more' than that: certain aspects/dimensions of culture can be altered intentionally, but the total outcome of such change may not be predictable. We cannot lead 'culture as a whole' in a certain direction by our intention. Culture is far broader and more complex than certain aspects which can be seen to be affected directly by a change in social structures and institutions like, for instance, policy. It appears that culture is too narrowly conceptualised in this perspective. As a whole, theories of the moral effect of welfare are still controversial with contradictory findings so far. Further discussion and research seem to be required on the subject beyond the limited space here - unfortunately, culture as a dependent variable is not one of the main concerns in this research.

2.3.3 Culture as public opinions/attitudes about/toward welfare

Public opinion is another cultural dimension noticed some time ago. To researchers focusing on public opinion, when culture is conceptualised as a general force for social structures it is an important but 'unexplained mysterious' factor (Whiteley, 1981: 454). Instead, the role played by public opinion (on a certain concrete issue) in policy making is clearer both theoretically (Burstein, 1998; Whiteley, 1981: 454-456) and empirically (Page & Shapiro, 1983). Public opinion is influential in agenda setting, limiting choices, and legitimising decisions. It creates a climate in which decisions are made. The influence of public opinion is, therefore, mostly indirect with some exception (Whiteley,

1981: 456-461).[18] This conceptualisation is widely shared by researchers (Alcock, 2001: 16; Cnaan et al, 1993: 124; Elkins and Simeon, 1979: 143 in Freeman & Rustin, 1999: 18; Pfau-Effinger, 2005: 12; van Oorschot, 2006: 24).

From this perspective the conception of culture (public opinion/attitudes) is placed at a far lower level compared with the cultural foundation approach above (Section 2.3.1). Almost always it is assumed there is a particular issue about which public opinion/attitudes are formed. The effect of culture as a broad background force such as the origin of diverse institutions is rarely of concern. Instead, attention is mostly given to empirical examination of whether there exist distinctive public attitudes toward issues relevant to welfare (hereinafter 'welfare attitudes') and to the reasons why there are differing welfare attitudes (inquiries on determinants of welfare attitudes). Unfortunately, however, empirical research on how welfare attitudes (public opinion) affect social policy making has been marginalised, probably because of the 'indirectness' of the influence of public opinion. This lack would be a limitation which public opinion studies within comparative social policy analysis still have. This will be discussed again (Section 2.4.1).

Within studies of welfare attitudes, it has been popularly hypothesised that there might exist distinctive welfare attitudes across different welfare regimes: with an implicit assumption that those distinct welfare attitudes may have contributed to the development of each welfare system; and with an explicit assumption that those differences in welfare attitudes would have been enhanced by the institutional force of differing welfare systems (e.g. Esping-Andersen, 1990). Put differently, more work has been devoted to finding different welfare attitudes and explaining these by the differing institutional characteristics of welfare (Blekesaune & Quadagno, 2003: 417) – this can be linked to the institutionalist concept of 'policy feedbacks' (e.g. see Skocpol & Amenta, 1986: 149-151): social policies reshape welfare attitudes as well as politics.

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[18] An example of the exception is the family fund set up in 1972 following 'the Thalidomide tragedy' (Whiteley, 1981: 456).

For example, it is reported that welfare attitudes to both 'justification of cheating the state'[19] and welfare responsibility[20] vary across 13 Western welfare states, and that this variation can be partly explained by different institutional arrangements (Gundelach, 1994: 47-51). [21] Differences between eight countries in public attitudes towards redistribution and income differences are found to dovetail neatly with four (Liberal, Conservative, Social Democratic, and radical/Antipodean) welfare regime types (Svallfors, 1997). [22] In Svallfors' analysis, stronger public support for governmental redistributive intervention[23] is found in Social Democratic, Conservative, Radical and Liberal regime countries in descending order, while the egalitarian view[24] is shown in Social Democratic, Radical, Conservative and Liberal regime countries in descending order. The varying degree of public support for governmental welfare intervention[25] between East Germany, Norway, West Germany and the US (in descending order too) is also presented as representing the four distinctive welfare regime types (Andreβ & Heien, 2001).[26] The effect of welfare regimes as an institutional force for individual welfare attitudes is more intensively examined by Arts and Gelissen (2001). They investigate determinants of people's preferred level of solidarity[27] in 14 countries and people's choices of justice principles[28] in 13 countries. Within their findings in relation

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[19] It was measured as the mean score of three items on a 10-point scale (never ~ always): whether a respondent can justify claiming benefits they are not entitled to; avoiding public transport fares; and cheating on tax, based on the EVS 1990 data.

[20] Drawing on the EVS 1990 data, it was measured by the question with 10-point scale of whether individuals should take more responsibility for providing for themselves, or if the state should ensure that everyone is provided for.

[21] It was based on the de-commodification index value in Esping-Andersen's work (1990).

[22] This study used the International Social Survey Programme (ISSP, hereinafter) 1992 data, except Austrian cases which need the ISSP 1987 data for some variables.

[23] This was measured with three items on a 5-point scale (strongly disagree ~ strongly agree) asking whether a respondent sees reducing income differences, providing a job for everyone and providing everyone with a guaranteed basic income as the responsibility of the government.

[24] This was indexed as the legitimate income difference in each society measured by the ratio of the legitimate incomes between the top three and bottom three occupations.

[25] The same three items were used as we saw in Svallfors' work (1997) above.

[26] This study was based on the ISSP 1992 data.

[27] Their measurement was based on seven items from the ISSP 1996 data, each of which had a 5-point scale for answering: how much respondents thought that, on the whole, it should or should not be the government's responsibility to 1) provide a job for everybody who wants one; 2) provide health care for the sick; 3) provide a decent standard of living for the old; 4) provide a decent standard of living for the unemployed; 5) reduce income differences between the rich and the poor; 6) give financial help to college students from low-income families; 7) provide decent housing for those who can't afford it.

[28] People's choice of justice principles was measured by three items of the EVS 1999 data asking respondents to evaluate the importance of each of the following statements about what a society should

to people's preferred level of solidarity, only a limited regime effect is found: between the liberal, the social-democratic and the Mediterranean regimes out of six regime types (conventional three types with Mediterranean, Antipodean, and South-East Asian regime). In analysis of the public preference for justice principles (equality, need, and equity principle) too, regime effect in four regime types (conventional three with Mediterranean) is limited.

In these studies, while the effect of program structures of welfare on welfare attitudes has been limited, other determinants of individual welfare attitudes have also been sought and found within various personal characteristics. These encompass gender, income, class, employment status, education, justice beliefs and egalitarian ideology, which (with the exception of gender) are often classified into two dimensions by researchers - interests dimension and values/ideology dimension (Blekesaune & Quadagno, 2003: 418). Meanwhile, the causal link between public opinion (welfare attitudes) and social policy has rarely been examined and proved within those works. Blekesaune and Quadagno (2003) raise this point: empirical findings supporting the impact of the regime on welfare attitudes have been neither so consistent[29] nor so robust because only a small number of countries has been analysed (meaning regime differences as an explanatory factor might be exaggerated); and more seriously, the other causal direction from public attitudes to the institutional structure of welfare has been neglected. Collective values would, at least partially, determine the institutional structure of welfare. They argue, therefore, that analysis of public attitudes should be extended to the collective level. However, their analysis[30] is also confined to examining the determinants of public attitudes (but, at both individual and country levels) and the causal direction from culture to social policy is left unexplored. The impact of both the interest dimension and value dimension is found at the collective level as well as at the individual level: at the individual level, welfare attitudes are dependent upon gender,

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provide in order to be considered 'just': 1) eliminating large inequalities in income among citizens; 2) guaranteeing that basic needs are met for all, in terms of food, housing, clothing, education, health; 3) recognising people on their merits. Each item is on a 5-point scale.

[29] For instance, they referred to Gelissen (2000, in Blekesaune & Quadagno, 2003: 417) who found the regime effect in the unexpected direction such as stronger support for welfare by the public in Liberal regimes.

[30] It was conducted in 24 countries based on the 1998 ISSP data.

self-interest (employment status) and ideology (egalitarianism);[31] at the national level, public interest (unemployment rate)[32] and social value (egalitarian ideology)[33] matter in the collective welfare attitudes. Societies with stronger egalitarian values are likely to have more positive public attitudes toward welfare for the unemployed, and societies with more unemployed people are likely to have more positive public attitudes to welfare for both the unemployed and the sick and old.

The intention to explain variations in welfare by welfare attitudes/opinion is more explicit in the examination of public perceptions of the cause of poverty (van Oorschot & Halman, 2000). With the reasoning that the public's view on the cause of poverty would be closely linked to the legitimacy of both social and economic inequality and welfare provision for it, van Oorschot and Halman expect a certain relation between variance of welfare across countries and the prevalent opinion about the cause of poverty. Drawing on the literature and their own analysis,[34] they differentiate two dimensions of explanations for being poor - individual/social and blame/fate dimensions - and as a result, four types of explanation of poverty: individual blame; individual fate; social blame; and social fate. However, at least within 15 Western welfare states, the variation in public perception of the cause of poverty is neither so large with the dominance of the 'social blaming' view in most societies except the US and Austria where more people share the 'individual blaming' view. Such slight differences between countries do not fit any welfare regime typologies except the 'social-dimension emphasising' Nordic regime and the 'blame-dimension emphasising' Southern regime compatible with Bonoli's typology (1997 in van Oorschot & Halman, 2000). Meanwhile, they report that individual opinion on the reason why there are people living in need is dependent upon the value dimension (post-materialistic attitudes and political left-right orientations), whilst the impact of the interest dimension (socio-compositional factors) is marginal.

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[31] It was measured with one item asking whether reducing income differences is the government's responsibility.
[32] It was measured with the percentage of unemployed amongst respondents.
[33] It was measured with the country mean of egalitarianism (see footnote 31).
[34] This work was based on the EVS 1990 (and partly the Eurobarometer 1977) data.

Van Oorschot's scrutiny (2000; 2006; 2008) of popular deservingness perceptions and the conditionality of solidarity is a further step towards explaining welfare by public opinion. With deservingness criteria, he attempts to dig directly into the centre of the cultural dimension in social welfare – what the public answer to the question of who should get what and why is. This would be, he argues, the key source for societal legitimate base of welfare reform/retrenchment since the 1980s and of welfare change in the future. In a Dutch study (2000)[35] he draws five dimensions of deservingness criteria from the literature and an additional one from empirical analysis: Control (why are you needy); Need (how much are you needy); Identity (are you one of us); Attitude (are you grateful for support); Reciprocity (what have you done, or can you do, for us); and Social risk (are you needy due to widely acknowledged social risks). For the Dutch public, control is the most important criterion of deservingness followed by identity and reciprocity. Individual conditionality of solidarity[36] is found, as other welfare attitudes studies have shown, to be dependent upon self-interest (age, education and socioeconomic status) and values (political stance, opinions on the moral effect of welfare, the fair functioning of the welfare system and the level of benefits). By extension of his study to 23 European countries (2006; 2008)[37] he attempts to find an empirical support for the cultural explanation of welfare, although his measures of both deservingness perception and conditionality of solidarity are more limited.[38] On the one hand, deservingness rank order[39] which is found the same for all object countries and for various social categories strongly implies that "the underlying logic of deservingness has deep roots" (2006: 31) and that it may have influenced the step by step development of support schemes for different needy groups exactly in the same order historically. On the other hand, however, variations in conditionality at the collective level are not

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[35] It was based on the Dutch TISSER-Solidarity study data in 1995.
[36] This was measured by how differently a respondent saw various pairs of contrasting needy groups in terms of their deservingness of financial support.
[37] It was based on the EVS 1999/2000 data between 23 East and West European countries.
[38] Because of the lack of relevant items in the EVS data compared to the Dutch TISSER-Solidarity study data, deservingness perception was inspected only in four different welfare target groups (in Dutch study, it was examined in 17 contrasting groups and 29 groups as a whole). As a result, there seemed to be a greater chance that both people concerning about every needy group and those not concerning about any needy group have equally low values in conditionality measure.
[39] The elderly were seen as the most deserving closely followed by the sick and disabled, while the unemployed were seen less deserving and immigrants the most undeserving.

distinctive across welfare structures (regimes). In the meantime, determinants of conditionality at the collective level are, again, public interests (wealth and unemployment rate) and social values (e.g. work ethic, trust and meritocratism). Individual conditionality of solidarity is, here again, dependent upon self-interest (e.g. income, age and education) and values (e.g. political stance, egalitarianism, welfare sentiment and trust).

As a whole, examples of studies on public opinion on welfare show that welfare attitudes are different across countries and welfare regimes but to a varying degree. Differences in welfare attitudes are not invariably large enough to argue that distinct welfare structures have partly shaped distinct welfare attitudes and vice versa. More seriously, research findings seem heavily dependent upon which welfare issue the public is talking about: public opinion on welfare is issue-dependent. Whilst issue-dependency *per se* is not odd, it can be problematic when we attempt to prove the causal relation from public opinion to welfare. In social policy making, what matters is not public opinion about one particular issue. People do "not necessarily seek to maximise one particular value," but may trade off multiple objectives aiming at a 'good enough' outcome (Taylor-Gooby, 2008: 172). About their findings – no relation between the welfare regime and the public perception of the reason of poverty - van Oorschot and Halman (2000: 21) conclude that welfare policies are not shaped only by popular perceptions of poverty but other cultural values and attitudes may also be involved. Kluegel and his colleague also argue from their examination of American beliefs about inequality that "the American public tends to support policy that is a compromise between" liberalistic ideology and individualistic tradition (Kluegel & Smith, 1986: 293). Furthermore, since public opinion is not consistent and there can be contradictory public opinions simultaneously (e.g. preference for lower tax and better protection by social security) it is difficult to specify the particular values and attitudes that have impact on policy (Larsen, 2006: Ch. 2).

In addition, there appears to be no clear (direct) process in which public opinion realises its influence. For example, if a certain agent is assumed such as politicians responding to

voters or lobbying groups, then they seem likely to be more dependent upon their own interests and ideas (van Oorschot, 2007: 135). Public opinion can be 'moulded' by policy-makers and the media (Page, Shapiro & Dempsey, 1987; Whiteley, 1981: 461), though it is not often and not only the case with public opinion but also other determinants of policy change (Burstein, 1998: 46-47). Public opinion seems instable and vulnerable to situations (van Oorschot, 2007: 135). Finally, as seen in the above examples, public opinion reflects not only cultural dimensions such as values, ideologies and norms but also various interest-related factors (van Oorschot, 2008: 273). Thus it is hard to tell whether it is the effect of culture or of interest, even whether evidence is found for the effect of public opinion. All of the above may partly explain the reason why public opinion studies have not been so successful in finding empirical evidence of the causal effect of culture on social policy making.

2.3.4 Culture from the policy-receiver's (user's) viewpoint

The effect of culture on social policy, not from the decision-making point of view but from welfare beneficiaries' or policy users' points of view, has also been illuminated. For example, it is reported that take-up of parental leave scheme depends more on 'motherhood culture' than types of schemes (Pfau-Effinger, 2005: 12). According to Pfau-Effinger the take-up rate of the parental leave scheme is much higher in Germany than in Finland, although the scheme characteristic is more generous in Finland. This is explained by the difference in cultural traditional ideas – there are stronger cultural beliefs that 'a mother should stay at home with her child … three years as the minimum … between four and fifteen years as the maximum' in Germany (Pfau-Effinger, 2004b: 100). The strong family-oriented culture in Germany reveals its influence not only on childcare but also on care for the elderly. The German government implemented the nursing care insurance scheme in 1995/6 which extended the choice of paid care provider for the senior. Contrary to government expectations, however, the proportion of hired professional caregivers did not noticeably increase. Still, relatives caring for the elderly are much more common in Germany, especially women who either reduce their working time or stay at home (Pfau-Effinger, 2005: 13-14). Unexpected outcomes caused by inconsistencies between policy-makers' expectations and service

users' values have also been reported by qualitative studies in various policy areas such as health care, social care and welfare-to-work programmes for mothers (Taylor-Gooby, 2008: 179-180). Referring to Baldock and Ungerson (1994, in ibid), Taylor-Gooby contends that service users' decision-making can be more dependent on their values and their assumptions about the appropriate 'consumer behaviour' than their income, needs and the amount of information they receive. In the context of 'welfare-to-work' programmes, it is argued that moral and socially negotiated norms about what is acceptable influence mothers' decisions about reconciliation between work and parenting (Duncan & Irwin, 2004: 397, in ibid).

This shows that culture matters not only in the decision making process of social policy but also in the implementation of concrete policies after a decision has been made. Cultural differences affect 'not only policy making but also practice in welfare' (Mabbett & Bolderson, 1999: 52). This can be linked to the concept of the 'ex-post' effect of culture on social policy as supporting or withholding the legitimacy base for concrete policies (van Oorschot, 2007: 135). However, this concept has not been well developed and is rarely examined empirically. This will also be a task of our research (Section 2.5).

2.3.5 Perspectives on culture

So far we have reviewed some of the few existing studies on the relation between culture and welfare, focusing on the effect of culture on social policy. Culture can shape the (development of) welfare distribution system by defining concepts (e.g. welfare, citizenship and freedom) and relations (e.g. between market and the state and between individuals and the state). Culture can also affect policy making through limiting available options and offering a legitimacy base. As might be recognised, however, there has been the lack of theory systematically explaining the relation between culture and welfare. Even prior to this, it is rather confusing what culture is, since the concept of culture seems to vary so much across studies. In fact, culture is so broad, multifaceted and multi-layered a concept, of which a definition, unfortunately, does not exist in a clear and agreed way (e.g. Freeman & Rustin, 1999: 13; Eckstein, 1988: 801 in Lockhart,

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2001: 8).[40] Instead, most researchers in the social sciences have referred to points in common within the literature: beliefs, values and norms shared by a certain group or community of people.[41] At the same time, more concern is given to how it should be conceptualised and which aspects of it should be explored according to research subjects.

As we have seen so far cultural explanations exist differently – they are based on different ways of how culture, social structures and institutions are related. In other words, the relation of culture with welfare has been found at various levels (Oyserman & Uskul, 2008: 145; van Oorschot, Opielka & Pfau-Effinger, 2008: 2, 9), which shows that there are different conceptions of culture. Without this consideration, therefore, findings and implications of existing works can be seen as confusing and sometimes contradictory. This suggests a prerequisite for the cultural approach in social policy: we need to clarify the scope and level of culture appropriate to the aim of each piece of research, as it is said, "[c]ulture's centrality to social explanation depends largely on how it is defined" (Lockhart, 2001: 8). However, this point is rarely dealt with and presented clearly in most works. Van Oorschot is one of the few researchers who recognise this.

With his colleagues, van Oorschot reviews how culture has been, implicitly and explicitly, conceptualised in the literature and clarifies the status and concept of culture appropriate to cultural explanations of social policy (van Oorschot, Opielka & Pfau-Effinger, 2008: 9-10). According to them, the approach that conceptualises culture the most comprehensively like the synonym of tradition or society cannot offer many points

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[40] Just for an example, Kluckhohn (1951: 86 in Hofstede, 2001: 9) defined, "[c]ulture consists in patterned ways of thinking, feeling and reacting, acquired and transmitted mainly by symbols, constituting the distinctive achievements of human groups, including their embodiments in artefacts; the essential core of culture consists of traditional (i.e. historically derived and selected) ideas and especially their attached values".

[41] This is the most widely shared notion of culture within the social sciences but, of course, there can be many other notions of culture. For examples, culture can indicate the 'whole way of life' of a certain collectivity (Williams, 1981 in Freeman & Rustin, 1999: 13), but also there are hierarchical notions of culture which focus on 'high' culture, as arts and media (Bauman, 1873 in Freeman & Rustin, 1999: 12-13). The former, the 'thick description' approach, would not lead to meaningful studies because culture, as everything, could explain nothing, while the latter, the 'high culture' approach would be limited in a very narrow scope (van Oorschot, 2007: 136).

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to empirical analyses. Both the materialistic[42] and the idealistic[43] approaches, meanwhile, tend to either underestimate or overestimate the role of culture. That is, the analysis of culture cannot be meaningful either when culture is just a passive reflection of social system or when culture determines everything. Neither can the approach that culture and social structures constitute each other,[44] which attempts to avoid the problems of both materialistic and idealistic approach, be appropriate in that such a relationship between these phenomena can hardly be examined empirically.

Only in the perspective[45] where culture and the social system are interrelated but not decisively determined by each other can the relationship between culture, actors and the social system be properly analysed. From this perspective, the 'welfare culture approach' suggested by Pfau-Effinger (2005), which offers a theoretical framework for understanding the relation between culture and social policy, is seen as profitable especially in understanding policy differences across welfare state (van Oorschot, Opielka & Pfau-Effinger, 2008: 10-11). This is the position adopted here. We see that the perspective which assumes a certain distance between culture and social structures and institutions, and as a result, assume a certain degree of independence of each of these, would be the most desirable for empirical examination of the effect of culture on social policy. We also see that probably only the welfare culture approach has so far provided a systematic theory of how culture matters in social policy making, reflecting the complex interrelations between culture, actor, social structures and social institutions. We will introduce this approach briefly.

2.3.6 How does culture matter in social policy – Welfare culture approach

The welfare culture approach is another name for the welfare arrangement approach (so, we will use these interchangeably hereinafter) suggested by Pfau-Effinger (2005), where welfare culture is the key concept interrelating with welfare institutions, social structures,

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[42] They referred to Marx, Durkheim and Bourdieu (van Oorschot, Opielka & Pfau-Effinger, 2008: 10).
[43] They referred to Parsons, Sorokin and Levi-Strauss (van Oorschot, Opielka & Pfau-Effinger, 2008: 10).
[44] They referred to Giddens and Baumann (van Oorschot, Opielka & Pfau-Effinger, 2008: 10).
[45] They referred to Weber, Eisenstadt, Alexander, Archer, and Lepsius (van Oorschot, Opielka & Pfau-Effinger, 2008: 10).

political actors and welfare policies, as well as offering a basis for the coherence of the welfare arrangement (2005: 4-6). This theoretical framework is designed to understand the role played by culture in welfare policy making more clearly, but in recognition, at the same time, of the roles played by political actors, social institutions (such as welfare state and market) and social structures (such as power relations and division of labour). Not by subordinating the cultural system to the social system or vice versa, but by just differentiating between the cultural system and social system, drawing on Archer (1995, 1996 in Pfau-Effinger, 2004b: 39-42), an adequate distance between culture and the social system (interrelated but not decisively determined by each other) can be assumed and the role of culture can be properly understood without being under- or over-estimated. This reasoning naturally leads to the admission that cultural dimensions are not the sole determinants of social policy (Deacon, 2002: 8; O'Connor & Robinson, 2008: 30; Pfau-Effinger, 2005: 11) – probably less influential than economic and political factors (van Oorschot & Halman, 2000: 21). Cultural system and the social system interrelate and interplay mainly through social actors whose ideas and interests are shaped by each of these respectively. Social policy is the outcome of this interplay, more concretely, of negotiation and compromises between ideas and interests made by political actors under the varying conditions of societal context reflecting time and place (also see 'the gender arrangement approach' in Pfau-Effinger, 2004b: 37-61).

Pfau-Effinger argues that the explanation of deviation of welfare can be enriched by this welfare arrangement approach (Pfau-Effinger, 2004a). For example, the concept of 'path-dependency', which has been widely discussed in analyses of welfare divergence, can be broadened by the inclusion of culture. According to her, the increasing returns and rational actors on which path-dependency is based are rather too narrow to explain the complex and often contradictory processes of welfare restructuring. The interrelations of institutions with societal context as well as the role of actors (e.g. actors' potential to create a new path) have been under-conceptualised. Path deviation is not always caused by rational motives or the search for an optimal solution, but it can be the case that there is a shift of the goals and a shift in the basic values of the welfare state. For instance, new social rights were created such as the individual rights of

children to public childcare, the right of elderly people to be cared and the right to provide care for relatives or friends. These came together with fundamental cultural change: seeing childcare and elderly care as 'work'; and the value of gender equality. In this process, the main cause for a new path is found in culture and the relation between culture and structure (Pfau-Effinger, 2004a: 13-14). The concept of 'critical juncture', which is used to explain the path deviation in the existing path dependency thesis, is not satisfactory for this process. Instead, with inclusion of culture, path dependency can be conceptualised as a complex, multi-level process not necessarily coherent but which can develop in contradictory ways. In short, change in culture can lead to path deviation on the one hand but continuity of culture can, on the other hand, lead to path dependency within the welfare arrangement.

Since culture is related to all components of the societal context in this approach, the concept of welfare culture is as broad and multileveled as culture. It includes any values, ideals and stocks of knowledge relevant to welfare. It is 'the relevant collective meanings in a given society surrounding the welfare state' (van Oorschot, Opielka & Pfau-Effinger, 2008: 11). According to Pfau-Effinger, there are three main levels of welfare culture: as the basis for policies; as the popular values on and attitudes towards the welfare state; and as values and attitudes included and expressed in social discourses (Pfau-Effinger, 2005: 9-10). Whilst the last level seems to be not a different level but a different way of cultural values existing and being expressed, the former two levels appear 'vertically' different. At the first level culture works as a basis for policies – policies are 'embedded in' cultural values. At another level, welfare culture is 'cultural values predominant in the population', which include welfare attitudes. The influence on policies of values at the former level is not always seen clearly since connections between the two – embedment and embodiment – are historical and contextual. Meanwhile, the effect on policies of values shared by majorities (at the latter level) can be clearer through, for example, responsive politics (Pfau-Effinger, 2005: 9-10).

These two levels of welfare culture partly overlap our grouping of existing works: culture as a general/foundational basis and culture as public opinion (Section 2.3.1 and

2.3.3). However, we have already seen from the existing literature that at both levels it is rather difficult to find empirical evidence for the causal effect of the cultural dimension on social policy making, whilst studies at both levels have contributed significantly to our understanding of the cultural foundations of welfare and welfare attitudes variations across countries and welfare regimes, respectively. Instead, we will suggest an 'in-between' level below (Section 2.4.3) which is neither as concrete as the level of public opinion on particular issues nor as abstract as the level of cultural foundation.

2.4 Which Level of Culture Does Matter (in this research)?

2.4.1 The level as public perception/attitudes

In the welfare culture approach it is assumed that cultural system and social system are interconnected but not mutually decisive. With the same reasoning, it can be argued that 'policy-makers act in an economic, political and cultural context' (van Oorschot, 2008: 268). This is especially so for social policy making, since the logics of 'welfare' policy-making are different from 'democratic' and 'capitalistic' policy-making in that they should be based on 'values embodied in an autonomous ethical system' as well as majority voting and efficiency for maximising individual preferences (Marshall, 1972: 20). Cultural context must be quite independent (autonomous) of economic and political context, since this is the very reason why culture can be another context for policy making. Change in the cultural context, which can be explained by the impact of the economic and political context, should be marginal. In this, the cultural dimension forming the cultural context for policy making would be 'beliefs, attitudes and values derived not from self-interest or economic interest at all but from purely social or moral choices' (Porter, 2000: 24). At the same time, the cultural dimension as a context which is embedded widely and deeply in society must be quite stable over time in itself (van Oorschot, 2006: 24).

If we draw on more detailed discussion about sub-concepts of culture, values would be the most appropriate dimension of culture for the cultural context. Within various

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dimensions and sub-concepts of culture, such as beliefs, norms, values, attitudes, symbols, heroes and even rituals, values have been regarded as the most stable and critical (Hofstede, 2001: 9-11). According to Hitlin and Piliavin (2004) values are distinguishable from attitudes, traits and norms. Values are markedly more immutable and abstract than attitudes. Values are placed in a higher position in one's internal evaluative hierarchy than attitudes. While attitudes are applied to more concrete social objects, values are favourable or unfavourable evaluations of an object. Values focus on ideals. Traits are enduring dispositions, whilst values are enduring goals. Values are referred to in justifying and judging behaviours, but not traits. One may have a disposition towards being aggressive, but may not highly value aggression. Norms capture an 'ought' sense, while values capture a personal or cultural ideal. Norms make actors feel normative pressure, but not values. Values are trans-situational whilst norms are situation based (Hitlin & Piliavin, 2004: 360-361).

A similar argument, but with more relevance to policy analysis, can be heard from Aalberg (2003). If we differentiate values, perceptions and policy attitudes, values are the most abstract and lasting ideas of what is desirable, which is often considered a latent component ultimately affecting more specific attitudes and behaviour. Perceptions are more specific and objective and less normative than values – perceptions are about how people actually observe reality. However, since perceptions are influenced by values, these do not necessarily reflect the actual state of affairs. Thus, a person who highly values equality but perceives society as being very unequal may argue for more progressive taxation or more transfers to the poor, whilst a person with the same values but an opposite perception will possibly support the status quo. Policy attitudes are applications of values to concrete situations and policies, which are more judgmental than values of the way in which specific policies are carried out (2003: 5-8).

By drawing on such discussion about sub-concepts of culture, it becomes clear that culture as public opinion/attitudes on/to concrete welfare issues is conceptualised at rather a low level. As we have seen above (Section 2.3.3) public opinions are issue-dependent and inconsistent, which makes it hard to claim a causal effect on social policy

making. Public attitudes are too situation-dependent. Welfare attitudes depend on 'the immediate surrounding socio-economic conditions' (Gelissen, 2008: 247). For example, the unemployment rate at the moment can affect popular perception of how deserving the unemployed are (van Oorschot, 2006: 26). As a result, public attitudes cannot be so stable. Furthermore, it is difficult to assign a certain effect on social policy, even if found, to culture and not to situations. Finally, popular perceptions and attitudes reflect, as most existing research shows, not only value-dimensions but also interest-dimensions (van Oorschot, 2008: 273). To which degree each of these two main determinants affects public perceptions is not clear. Thus, even if an effect of public opinion on social policy is found, it is not solely, if at all, due to the impact of culture, which cannot be compatible with our reasoning on the cultural context for policy making above.

2.4.2 The level as basic values

As the core component of culture, values are widely used as equivalent to culture when the most fundamental or the most abstract dimension of culture is referred to. Studies of the cultural foundations of welfare have mostly used the term values as interchangeable with culture. Similarly, studies of values have mostly focused on the very basic and universal human values which can be linked to such an abstract conception of culture. However, according to our review this is not so fruitful for the empirical analysis of cultural accountability for social policy. We will discuss this again with a brief review of studies on the basic human values.

In the school of political culture, Inglehart (1977; 1990; 2000; Inglehart & Baker, 2000; Inglehart & Welzel, 2005) has attempted to measure 'basic' values. On the one hand, according to Inglehart (1977) physical safety (no war) and prosperity since the Second World War have led to a change in the basic values of the Western public. Priority of people tends to be given to needs hard to be satisfied (the scarcity hypothesis, also see Inglehart, 1990: 56, 68). When basic needs such as food and safety are not 'scarce' anymore, the Western public may have begun to place more emphasis on other, higher types of needs which are 'non-material' goals such as belonging and self-expression. This has led to a change in the basic values from Materialist to Post-Materialist values.

On the other hand, if people tend to retain an established set of value priorities (the socialization hypothesis, also see Inglehart, 1990: 56, 68) such a value change may proceed only gradually (historically). As a result, the basic values – Materialist/Post-Materialist values - may vary cross-nationally and change in 'a predictable fashion' (or path-dependently, also see Inglehart & Welzel, 2005: 18-22) reflecting each country's history and public experience of it (Inglehart, 1977: 21-24). As Inglehart's research has developed, the basic values have been expanded from one dimensional Materialist/Post-Materialist values to two dimensions: Traditional vs. Secular-Rational values; and Survival vs. Self-Expression values (Inglehart & Baker, 2000; Inglehart & Welzel, 2005: 48-76). Empirical examination in various ways in terms of methods and data has supported this reasoning and argument: it has found distinctive one dimensional and later two dimensional basic values repeatedly;[46] the generational effect on these values is presented; so, the basic values of the Western public have been changing (the rise of Post-Materialist values or the transition to secular-rational and self-expression values); and differing distributions of these values across countries have also been found; and so on (Inglehart, 1977: 27-71; 1990: 71-103 & 130-161). From a (revised) modernisation theory perspective, such a value change is explained as a cultural reflection of the process of human development towards more humanistic societies emphasising human freedom and self-expression (Inglehart & Welzel, 2005: 2).

This is echoed by the findings from the EVS data (Hagenaars, Halman & Moors, 2003). Hagenaars and his colleagues extract two dimensional 'fundamental' values – personal autonomy (or social liberalism) values and religious-normative values – through factor analysis of 40 indices constructed from the 1999/2000 EVS data between 33 European countries. The former dimension can be linked to Inglehart's 'survival vs. self-expression' dimension, the latter to 'traditional vs. secular-rational' dimension. Here too, despite some deviant cases, overall 'generational effects' are found: an increase in socio-

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[46] The Materialist/Post-Materialist values could be not only seen in the four item index but also from factor analysis of 12 items. Examined data sets ranged widely from national survey data from many countries through Euro-barometer survey data to three waves of the WVS data, all of which covered almost three decades.

liberalism (stronger in younger generations) and decrease in normative-religious values (less so in older generations).

In psychology, Hofstede (1980; 2001) and Schwartz (1992; Schwartz, 1994a, 1994b, 1999; Schwartz & Bilsky, 1987, 1990; Schwartz & Sagiv, 1995) have attempted to determine the human basic values empirically. The survey items from which Hofstede and Schwartz draw fundamental values are psychological, whilst Inglehart's items are rather socio-political. However, all three researchers cited above share as their starting point the reasoning that basic values are formed in response to human or society's basic needs. According to Hofstede[47] there are five 'basic problems' with which all societies have to cope, but to which each society responds differently: inequality; uncertainty; the relationship between the individual and the collectivity; the gender role system; and the long-/short-term orientation (Hofstede, 2001: 28-29, 79-84, 145-148, 209-212, 279-284, 351-355). From this, he draws five fundamental dimensions of culture.[48] Similarly, Schwartz[49] bases his attempt to find the universal contents of human values on the 'three universal human requirements': biological needs; requirements for coordinated social interaction; and survival and welfare needs of groups (Schwartz & Bilsky, 1987: 551; 1990: 878). From these, 10 distinct motivational types of values forming two dimensions are derived through empirical analysis (Schwartz, 1992, 1994a).[50] For the societal level, Schwartz extracts seven values from three 'issues that confront all societies': to define the nature of the relation between the individual and the group; to guarantee responsible behaviour that will preserve the social fabric; and the relation of humankind to the natural and social world (Schwartz, 1999: 26-28).[51]

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[47] His empirical analysis was based on the IBM international employee attitudes survey data which had been conducted two times in 1967 and 1973 between 72 countries as a whole.
[48] These are power distance; uncertainty avoidance; individualism/collectivism; masculinity/femininity; long-term/short-term orientation.
[49] His analysis was based on his own survey with 56 items conducted across 20 countries. This survey was later developed as the 'Schwartz values survey', which has been repeatedly conducted across over 40 countries.
[50] These are universalism; benevolence; tradition; conformity; security; power; achievement; hedonism; stimulation; and self-direction.
[51] The 7 values are hierarchy, conservatism, harmony, egalitarianism, intellectual autonomy, affective autonomy and mastery (Schwartz, 1994b).

Definitely, these are path-breaking and seminal empirical studies on values. Yet, from our point of view or for the purpose of empirically analysing the effect of culture, the weak points of such an abstract approach to culture have already been discussed above. Inglehart makes it clear that his conception of culture is at the very abstract level where culture plays the role of a general and foundational factor for the entire society. Culture which changes 'in response to changes in the socioeconomic, political, and technological environment', he argues, also shapes that environment. Cultural change "facilitated the rise of the Industrial Revolution" (Inglehart, 1990: 3), and is shaping not only 'the economic growth rates of societies' but also "population growth rates and church attendance rates" (Inglehart, 1990: 4). As discussed before, these kinds of propositions can be 'catch-all' explanations where culture explains everything – "the (Japanese) government's values and ideology make all – or most of – the difference [in social policy between Sweden and Japan]" (Verba et al, 1987: 270 in Lockhart, 2001: 226).

There is also a concern about the oversimplification of cultural dimensions. There may be lots of diverse cultural dimensions at lower levels that cannot be fully and sufficiently reflected in the limited number of cultural categories suggested by these approaches (Lockhart, 2001: 227). That is, we may not see the trees for the wood. "[S]uch a broad conceptualization can rob the term culture of conceptual specificity, making it all but impossible to make specific predictions about how and when culture matters" (Oyserman & Uskul, 2008: 146). Related to this, the basic human values appear somewhat environment-deterministic. Since such basic values are formed in response to 'the basic needs' differences in values between societies can be dependent upon, for example, whether a certain society is environmentally resource-rich or not. Even if the 'basic' values can be exhaustively explained by basic needs, humans are not always motivated by desires and sometimes, for example, a sense of duty might override our basic instincts (Deacon, 2002: 63). At the same time, such highly abstracted values appear to be strongly dependent upon the economic dimension. Post-Materialist values and socio-liberal (self-expression) values tend to co-vary with the degree of economic wealth (Hagenaars, Halman & Moors, 2003: 33-34; Inglehart, 1977: 39). In Schwartz' work (1994b: 113-115, table 7.3) as well, we find that the more industrialised Western

countries are placed close together in the table of the country mean scores of seven culture-level values in most cases. In some respects, this is natural since they draw the basic values from the basic needs including biological needs which would be met by an increase in economic wealth. In fact, this is the basic assumption of Inglehart who stands by the modernisation logic (Inglehart, 1990: 31, 56-64; Inglehart & Welzel, 2005: 22-24, 29-31). This may be another obstacle to claiming the causal effect of culture.

2.4.3 The 'in-between' level – societal values as cultural context

We assume there can be values at the 'in-between' level (between the concrete level of public opinion and the abstract level of basic human values), which exists not as the profound context for social structures and institutions but as a cultural context that has been formed through shared experience of more nation-specific historical and social events and situations between members of a society. These value-differences across countries may partly consist of 'national cultures' which influence 'the institutional design, generosity of welfare states, and types of welfare' (van Oorschot & Halman, 2000: 2) - national cultures or national culture-specifics may also be found at different levels, according to the level of conception of culture. Values at this level will be called 'societal values' in this research, since societal values, if aggregated, would show each society's value-difference or value-characteristics. It should be noted that we do not assume that societal values are the collective level phenomena. Societal values, as are all values, are held by people at the individual level. That is, societal values may be shared by most members of a society and form the cultural context 'if collectively seen'.

According to Haller (2002), we can distinguish between three kinds of values: 'Universal values' as the very basic human values; 'Societal values or value orientations' which are more concrete and 'valid in a specific societal context and actually held by certain groups or populations'; and 'Situational value orientations and norms, guidelines, and prescriptions' which are related to 'the concrete application of values to social behaviour in specific circumstances'. Value differences between societies in universal values are expected to be relatively marginal with only varying

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degree of relative importance between values since universal values exist and persist in an 'objective sense'. Societal and situational values, conversely, may vary across societies since they contain not only universal elements but also 'references to concrete social circumstances' (2002: 143). Yet, societal values may have wider and deeper ground within a society and be more stable than situational values. Situational values appear very similar to perceptions and attitudes in that they are closely linked to particular issues and situations and may reflect interest-dimensions too.

In fact, this level of societal values seems to have been suggested by the welfare culture approach on which our research draws. When Pfau-Effinger (2005) talks about the second level of welfare culture as predominant values in the population, she appears to refer to more stable cultural values than public attitudes, such as cultural values on gender and family (e.g. the male breadwinner cultural model) which she found influential in the development and change of family policy within Western European countries (2004b; 2004c). Such values on gender and family appear to be beyond the level of public opinion or 'situational values' dependent upon not only value-dimensions but also interest-dimensions. If this is not the case, she may not be able to strongly assert the effect of 'culture' on the development of family policy even with data and historical facts. Cultural traditions of Scandinavian countries found by Lin (2005) would be another example of such societal values. As we saw before (Section 2.3.1), for example, traditions of political obedience, of individual autonomy and of weak familism are found within Scandinavian countries. These multiple cultural traditions appear to be not as abstract as specifying a few dimensional cultural foundations for an entire society or universal human basic values but a cultural context that has influenced the development of the Scandinavian model of welfare.

There is a counter-argument that such societal values also refer to particular issues like gender and family. This is true. Even if it is argued that issues and subjects such as these, to which societal values are related, are less concrete and less situational than those to which opinion, perceptions and attitudes refer, there is no clear criterion for such a differentiation. For this, we should draw on another aspect – stability. According to our

reasoning so far, societal values as cultural context must be widespread and deeply embedded in a society and be quite persistent over time (see Section 2.4.1). Societal values as accumulated reflection of experience of nation-specific context are expected to be far more stable than situational values which may fluctuate depending on concrete circumstances. One may also argue that not only situational values but also societal values are affected by interest-dimensions since values interact with perceptions, attitudes, self- and class-interests, for example (Aalberg, 2003: 5-8). Again, we see how stable societal values are can be if not a perfect then at least a plausible answer for this. If societal values are rather endurable while interest-dimensions, perceptions and attitudes are rather fluctuating depending upon situations, then the direction of influence may be much more from societal values to those situation-dependent dimensions, than vice versa. In other words, when societal values are found to be stable, the explanatory ability of such values, if any, can be asserted without much consideration of external factors impinging upon these values. This would be another distinctive aspect of societal values from situational values.

It is expected, therefore, that we can survey distinct cultural characteristics of societies[52] through examining societal values shared by the majority in the population. Cultural context by societal value differences across countries is expected to be quite stable over time, independent of economic and political context and trans-situational. Unfortunately, however, there are few examples of such 'societal values' in the existing literature. Although lots of cultural variables have been suggested, except for the basic human values examples, these are mostly neither 'testable' for stability nor stable over time. This will be discussed in detail in a later chapter (Chapter 4) where inevitably we will attempt to draw societal values through exploratory quantitative data analysis. Before that, what we need to do is to conceptualise how societal values affect social policy making. Although the welfare culture approach provides us with a theoretical framework for a cultural explanation of welfare, its focus is on the comprehensive understanding of

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[52] Whilst culture can refer to any collectivity of people, here it is studied by nations. This is the most widely chosen level of culture in comparative studies (Hofstede, 2001: 10; Schwartz, 1999: 25). Another subject of our research, differing features of social policy, are mostly examined at the societal level too. This will be discussed in the next chapter (Chapter 3).

the relation between culture and social policy within the very complex interrelations of cultural and social systems. As a result, how welfare culture affects social policy is not dealt with in a detailed manner. For the empirical examination of the effect of culture on welfare, a more concrete conceptualisation, which would enable us to construct hypotheses that are empirically testable, is required. This is the topic of the next section.

2.5 How do Societal Values Affect Social Policy – Twofold

According to the welfare culture approach, the process in which culture affects social policy is twofold: through ideas - social actors' conflict, negotiation and compromises (as a result, social policies) are based on ideas and interests; and through modification of the impact of welfare policies on individuals and social groups (Pfau-Effinger, 2005: 6). A similar twofold argument about the way how public opinion affects social policy has already been proposed - public opinion may set and limit issues, agendas and options (Alcock, 2001: 16; Elkins and Simeon, 1979: 143 in Freeman & Rustin, 1999: 18; van Oorschot, 2006: 24), and it may offer or withhold source of legitimacy for social policies (Cnaan et al, 1993: 124; van Oorschot, 2006: 24). From a slightly different point of view too, while examining the role of value conflict in policy change, Stewart (2006: 186) argues that value conflict over policy may arise at the development stage and re-emerge after its implementation. In this, the effect of culture on social policy can be conceptualised separately: 'the ex-ante effect' as a causal factor; and 'the ex-post effect' as the legitimacy base (van Oorschot, 2007: 134-135).

2.5.1 The ex-ante effect of culture

Public opinion is itself the result of conflict, negotiation and compromise between value-dimensions (ideas in the welfare culture approach) and interest-dimensions under a certain situation including time and place. Thus public opinion varies across time and countries, and also depends on issues and situations. In this process, it is clear that societal values as 'ideas' have impact on – but do not exclusively determine - public opinion. Meanwhile, public opinion is not social policy – the final result of the decision

making process. From a decision-makers' perspective, social policies are the results of conflict, negotiation and compromise between not only their own values and interests but also socio-economic context, socio-political context and socio-cultural context (public opinion). Here, societal values may have influence on political elites (policy-makers) who share the same values as members of a society. However, the effect of societal values on individual decision makers is not our concern – also, it would be difficult to examine. We would need survey data on policy makers' values and on the decisions they make.

Turning to the point, the ex-ante effect of culture as a causal factor is conceptualised as this: societal values may form the cultural context and affect public opinion which has impact on policy making through setting and limiting agendas and options. The causal effect of public opinion on social policy making has not been sufficiently advocated, conceptualised or found empirically so far, mainly because public opinion is not a stable factor and policy-making seems to be related not to public opinion on a particular issue but to public opinion*s* on various issues simultaneously (Section 2.3.3). However, in our conceptualisation, it is expected that we can see the effect of societal values on 'each' public opinion (or public opinion on each issue) clearly, regardless of the instability of public opinion. Furthermore, we can attempt to examine the influence of values on each policy decision – through analysis of variations of policy decision with societal value-differences. Although public opinion is omitted, through which cultural context realises its impact on policy making, we may be able to analyse the (causal) relation between national cultural context and particular policy decisions if cultural context is substantially trans-situational (quite stable over time). Even though the generalisability of the findings from such an analysis might be limited, they would not be meaningless - especially at the moment when there is a need for more empirical analyses of cultural explanations of welfare.

2.5.2 The ex-post effect of culture

The ex-post effect of culture on social policy is revealed through people's evaluation of concrete policies. When a policy instrument is introduced and implemented, people

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evaluate it individually or in groups - whether it is good or bad, desirable or undesirable, would-be effective or not, and so on, for themselves, for targeted beneficiaries or for the entire society. Having such judgments about a policy instruments is conceptualised as policy attitudes by Aalberg (2003: 5-8). Meanwhile, there is almost always cleavage to a certain extent between people's values and a specific policy instrument. Even if people's values are reflected in policy making as a causal factor, as seen in the discussion about the ex-ante effect, the influence of values is limited. Decision making is not exclusively driven by the cultural context but more by, for example, interests and power relations. Thus a gap has inevitably arisen between concrete policy and the values of people, especially those of policy recipients, which will influence their policy attitudes. This does not mean that people's policy attitudes are dependent only upon their values. Similar to the process of the ex-ante effect, there may be other factors, such as interests and socio-demographic conditions, all of which are not necessarily mutually exclusive. People may find that a specific policy is unsatisfactory referring to their values, their material interests and/or their particular situations, all of which may lead to their negative evaluation of the policy.

It is reasonable to conjecture that the evaluation of a concrete policy by people (policy attitudes) affects the fate of that policy. When people favour and support a policy, government is encouraged to continue, enhance and expand it. If the policy is unpopular there are calls for it to be amended, repealed (abrogated) or replaced by another. In short, whether people see a policy as being legitimate, which would partly determine the policy's future, is dependent upon the policy attitudes they have. The ex-post effect of culture on policy is found here, where policy attitudes, which are partly shaped by values, have impact on existing (already implemented) policies' survival. If a broader viewpoint of the policy process is taken, we can argue that this impact of policy attitudes at the 'after' side of decision-making is another causal (before side) effect on policy-making. Cultural analysis of social policy can be consolidated by diversifying angles and foci. In this respect, illuminating the ex-post effect may be a promising field in the cultural analysis of social policy. However, research on the ex-post effect of culture is relatively underdeveloped with the exception of the few examples reviewed above

(Section 2.2.4). Recently, Taylor-Gooby and Wallace (2009) contended that the lack of understanding of service users' values in the recent social policy reform of the UK has damaged the legitimacy of, as well as public trust in, services.

2.6 Hypothesising the Effect of Societal Values on Social Policy

Based on our conceptualisation of both the ex-ante and the ex-post effect of culture, we can construct three hypotheses as follows:

1) Cultural context (aggregated societal values) should affect public opinion on specific welfare issues;

2) Cultural context (aggregated societal values) should have an impact on policy decisions;

3) Societal values should have influence on individual policy attitudes toward a concrete policy.

While hypotheses 1) and 2) are about the ex-ante effect of culture, hypothesis 3) is about the ex-post effect of culture. Also, hypotheses 1) and 2) are constructed at the collective level, whilst hypothesis 3) will be examined at the individual level. As the reader might have recognised, however, these hypotheses are too broad and unsuitable for empirical examination. This is mainly because our key explanatory variables – societal values – are not confirmed yet. Our hypotheses, therefore, will be narrowed down further in each chapter of analysis (Chapter 6 and 7) with specified variables of societal values which will be drawn from an independent data analysis (Chapter 4). The discussion below is about the conceptual consideration guiding this concretisation of hypotheses later on.

2.6.1 Public opinion and policy decision on 'who should get what and why'

Although there are and can be many examples of public opinion on welfare issues, public perceptions more closely related to the welfare moral question of 'who should get what and why' require additional attention here. Such public attitudes are not only

expected to show a stronger effect of values on them but also to be more crucial in wider aspects of welfare, as well as in relevant policy making. For example, the public's view on the reasons for poverty, which is linked to the answer to the 'why' question, has been regarded as related to not only the general character of welfare states in terms of levels of social spending, generosity and so forth, but also types of anti-poverty policy (Lepianka, van Oorschot & Gelissen, 2009: 421; van Oorschot & Halman, 2000). In particular, the 'victim blaming' view of poverty which sees the poor as 'in control of their neediness' has been proposed as more relevant to the variations in welfare (Larsen, 2006; van Oorschot & Halman, 2000). Similarly, it is likely that the effect of values on policy decisions is more to do with the welfare moral question than decisions about general welfare. For example, the influence of values may be stronger on decisions about welfare generosity, which can be linked to the answer for 'what', and on the choice of which welfare target group to support, which can be linked to the answer for 'who', than on decisions about the total sum of welfare effort.

2.6.2 The passive resistance to a policy

To examine policy attitudes empirically is not easy. The policy attitudes of people appear not to be easily visualised publicly - especially when they are positive toward policies, in which case they tend to remain unspoken unless individuals are asked to reveal their preferences (for example, by polls). Even though there are polls about certain policies, the results can hardly be comparable – there cannot be exactly the same policy across societies, since welfare policies reflect the complex context and conditions of each society. It may still be possible to inspect variations of policy attitudes to a nationwide policy by regions within a country or towards a policy enforced by supra-national organisations such as the EU. Unfortunately, however, both are not available given the data we have for this research.

People can show their policy attitudes more actively, when these are negative towards a specific policy – for example, through petitions or demonstrations. Possibly, they will manifest in more aggressive ways when their (material) interests are threatened. If we

can call such voluntary and aggressive resistance to a policy 'active resistance', there must also be 'passive resistance' to a policy - when they find they just cannot approve a policy as much. The cleavage between values and policies would lead not to the former case - active resistance - but to the latter case - passive resistance. This does not mean that the negative policy attitudes to certain policies can be differentiated by reasons – either interests or values. Both would affect any policy attitudes simultaneously. However, if we want to focus more on the cases which illuminate the effect of values better, examples of passive resistance would be more desirable than those of active resistance which are probably driven more strongly by interests than values. One possible way of passive resistance may be hesitation in taking up a certain entitled service/benefit offered by a policy instrument. This is supported by some of the empirical work reviewed above (Section 2.3.4), which show that there is a cultural influence on the decision of non-take-up.

2.7 Chapter Concluding Remarks

Although culture has only recently attracted increasing attention within social policy analysis, in this short time the cultural dimension appears to have become one of the 'usual suspects' in the comparative study of welfare. For example, the study of the cultural foundations of welfare is well-developed and has enabled us to understand how ideological and religious traditions - such as liberalism (individualism), socialism (collectivism), conservatism and Christianity - have shaped Western welfare states. Another example is research on popular perceptions of and attitudes towards welfare, which has brought to light the variation in so-called 'welfare attitudes' across countries and welfare regime types, implying a mutual impact between public perception and the institutional design of welfare.

Meanwhile, empirical support for the argument that culture matters in social policy making from the quantitative comparative approach has been rare and not so successful. Whilst the review here basically shows the relative lack of cultural analysis in terms of the amount conducted so far, the existing literature does suggest a different level of the

cultural dimension that could be fruitfully and empirically examined. Drawing on the welfare culture approach (Pfau-Effinger, 2004b, 2005; van Oorschot, Opielka & Pfau-Effinger, 2008) for our theoretical framework, the concept of societal values (Haller, 2002: 143) is introduced as an 'in-between' level of the cultural dimension (between abstract cultural foundation of welfare and concrete public attitudes). This facilitates conceptualisation of a twofold effect of culture on social policy, which has so far rarely been differentiated clearly and investigated empirically: the ex-ante (before side of decision making) effect on social policy making through public opinion; and the ex-post (after side of decision making) effect through individual policy attitudes which may collectively offer or withhold legitimacy support (cf. van Oorschot, 2007: 134-135).

We do not argue that only the level of societal values is suitable for cultural explanations of welfare. Conversely, the validity of the suggested level of the cultural dimension can be questioned. The conceptual distinction between the three levels of values is not quite clear, especially between situational and societal values, as it was discussed (in Section 2.4.3). Rather, from an empirical point of view, we suggest that stability would work for differentiating criterion – situational values may not be stable. Distinguishing between universal and societal values can also be problematic, especially in empirical analysis. In the empirical examination of values, if the research is not based on a uniquely designed and developed survey focusing on the basic human values (e.g. Schwartz's values survey), both universal values and societal values will be drawn similarly from the process of abstracting attitudinal survey items. In this case, the two different levels of values will be decided only by how far abstracted the items are. The adequacy of using such data analysis methods – stability test and abstracting process – as criteria will be a part of the next chapter, but this limitation should be kept in mind.

It is also debatable why the ex-post effect is conceptualised at the individual level, whilst the ex-ante effect is conceptualised at the ecological (country) level. One may argue that aggregated societal values as cultural context may affect policy attitudes 'of the public'. This is also true. However, we assume that policy attitudes are not easily captured (see Section 2.6.2). Within active and passive resistance which are more or less expected to

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show policy attitudes, a better chance to observe the ex-post effect of culture may be offered by passive resistance cases. And passive resistance would be taken not by the public but mainly by the limited 'policy recipients' of a specific policy. In this, individual level analysis would be better suited to examining the ex-post effect of culture by looking at passive resistance. We admit that this is a practical consideration which might limit the generalisability of our findings.

In spite of such limitations, we expect our attempt to contribute to enriching the cultural analysis of social policy. Our standpoint is that the cultural analysis of welfare would benefit from different conceptualisation, measurement and examination, given that culture is such a broad and multifaceted concept, and that both abstract and concrete conceptions of culture have not much enabled empirical research so far. "In the social sciences, changing questions and ways of seeking answers are just as important as accumulations of research findings" (Skocpol & Amenta, 1986: 132).

CHAPTER THREE:
METHODS AND METHODOLOGY

3.1 Introduction

A review of the literature on the relationship between culture and social policy in the previous chapter has led us to three broad hypotheses: 1) cultural context (aggregated societal values) affects public opinions on welfare issues; 2) cultural context has an impact on policy decisions; and 3) societal values influences individual policy attitudes toward concrete policies. To examine these hypotheses, this research takes a comparative-quantitative approach, based on the premise that both culture and policy are 'inherently and indelibly' comparative (Hudson & Lowe, 2004: 248) and drawing upon the increasing number of cross-cultural attitudinal surveys, which facilitates quantitatively designed multi-national comparative studies of social policy with a focus on the cultural dimensions of welfare.

Above all, collecting examples of societal values is part and parcel of this research. Since there are few existing studies of societal values, the European Values Study (EVS) and corresponding World Values Survey (WVS) data are analysed in an exploratory way. These are one of the few examples of data sets dealing with value dimensions in the widest possible way, in terms of items as well as countries. Data of three waves covering almost two decades are examined to test the stability of values. A factor analysis statistical technique, principal component analysis (PCA hereinafter) is used not only for abstracting (drawing underlying values from attitudinal data) but also for examining change in notions across time and space (Chapter 4). In the examination of cultural effect on social policy, multivariate regression modelling (Chapter 6) and logistic regression (Chapter 7) will be applied. It is the aim of this chapter to introduce, review and justify the methods applied in this research. However, special attention is paid to methods in analysis of data on values to draw examples of societal values – data and methods for analyses of the ex-ante and ex-post effect of culture will be introduced and discussed in the corresponding chapters (Chapter 6 and 7).

Meanwhile, the fact that this research is a study of culture necessitates discussion of the cultural-epistemological stance taken here since there is a risk of making ethnocentric judgements when dealing with cultural issues. Likewise, the application of a quantitative approach to culture invites ontological consideration - even in a brief manner at a superficial level. We will briefly examine the cultural pluralist approach used in this study, which facilitates the exploration of cultural dimensions in ways that are relatively free from ethnocentrism. This research is also informed by both moderate objectivist and moderate constructionist ontology which enable us to examine culture as a property without denying the roles played by actors and agency and the changeability of culture. This chapter will begin with a discussion of these cultural-epistemological and ontological issues.

3.2 Cultural Pluralism

"Because our values are programmed early in our lives, they are non-rational (although we may subjectively feel ours to be perfectly rational!). In fact, values determine our subjective definition of rationality" (Hofstede, 2001: 6).

No social science is completely 'objective' and social researchers cannot be absolutely free from value-judgements but these issues become even more salient in the study of culture, where value-judgement itself is the subject. Students of culture are confronted with people of different groups making different, sometimes opposite, value judgements about the same thing and they must deal with the question: 'are there any absolute values at all or only relative ones?' (Hofstede, 2001: 15) It is natural to have certain value judgements in mind when people see any traditional practices, symbols or even popular fashion trends of another culture, but what is worse is that very often these value judgements are not expressed as a personal preference but exaggerated to differentiate between goodness and badness, beauty and ugliness or better (superiority) and worse (inferiority) - which can lead to ethnocentrism.

As Edgerton (2000: 126-127) rightly points out, it is difficult for most people to (personally or privately) agree with the assertion of many anthropologists that 'there is no scientific basis for the evaluation of another society's [culture]' and that cultural adaptations 'are seldom the best of all possible solutions and never entirely rational' (Roy Ellen, 1982: 251 in Edgerton, 2000: 138). However, the problem is that our 'rationality' is likely to be partial and subjective, as can be seen from the quotation above. For example, we might evaluate the US as 'objectively' better than Africa and India in terms of child survival rates – but only if our measure is the first nine months after birth. If it is the first nine months after conception, then opposite is 'objectively' true (Shweder, 2000: 165) – we might evaluate the US as objectively worse than Africa and India in terms of child survival rates. It has been suggested, therefore, that studying cultural differences needs to 'presuppose a position of cultural relativism' (Hofstede, 2001: 15).

Inquiries about the relationship between culture and certain social phenomena provide plenty of reasons for adopting a clear cultural-epistemological stance. Interpretations of research findings can vary widely due to different points of view. For example, it is reported that culture matters in economic development (e.g. Grondona, 2000; Lipset & Lenz, 2000; Porter, 2000). This might imply that we should try to promote pro-economic development culture (Harrison, 2000). From a different perspective, however, such an interpretation is seen as merely a claim of 'cultural developmentalists' (Shweder, 2000: 160-161). Instead, one may see, from a cultural relativist point of view, that material prosperity by which many 'good' things in life can be given is just 'one of them'. There might be many other 'goods' – equal or better to those provided by material prosperity – which are inherently conflicting with the goods obtainable by economic development, and some of these goods may be supported by anti-economic development culture. Cultural studies need to clarify their standpoints – we are in sympathy with the latter, cultural relativism.

Cultural relativism has played an important role as a corrective to ethnocentrism, especially Euro-centrism, which presumes uni-linear evolution of culture towards a more

progressive version of Western European civilisation (Edgerton, 2000: 131-133). Empirical research has so far found no such cultural convergence – culture can change, and has changed, but it is still debatable whether cultures are becoming more similar. For example, even Inglehart, who claims there has been a cultural shift towards industrialisation and post-modernisation, admits that cultural change is path-dependent and cultural differences between societies have not been reduced (e.g. Inglehart, 2000; Inglehart & Welzel, 2005).

Cultural relativism does not necessarily mean epistemological relativism. In other words, it does not mean that universal knowledge of the social world is impossible. In its extreme versions it is closely linked to epistemological relativistic viewpoints but there are moderate versions of cultural relativism – such as cultural pluralism, on which this research is premised. Shweder describes cultural pluralism as:

> "…I am a cultural pluralist. My version of cultural pluralism begins with a universal truth … that the knowable world is incomplete if seen from any one point of view, incoherent if seen from all points of view at once, and empty if seen from "nowhere in particular". Given the choice between incompleteness, incoherence, and emptiness, I opt for incompleteness while staying on the move between different ways of seeing and valuing the world" (Shweder, 2000: 164).

According to Shweder (2000: 164-166) this is an in-between perspective, neither the radical relativism of 'anything goes' nor the uniformitarian universalism of 'only one thing goes'. Thus cultural pluralism can be compatible with universalism which does not presume uniformity: there can be many 'universally binding' values such as justice, autonomy, liberty, and so on. These cannot be represented by certain common denominators, and they are 'inherently in conflict with each other'.

No culture is better, and there is 'no universal solution' (Hofstede, 1980: 373). Peterson (1999: 58) concludes that the Swedish welfare model, which has been popularly referred to as a more solidaristic and sometimes more desirable model, would reflect complex correlations between various factors such as 'natural and historical preconditions, size of

sectors, political culture, social security systems and their combined impact upon quality of life', and so on. It may not be achievable in other societies of different preconditions, sizes, cultures and institutions. Furthermore, from the cultural pluralist perspective it would not be more desirable for other cultures since it is merely one combination of inherently conflicting universal values. From this point of view, researchers may draw implications not of 'the development of culture', but of why different combinations have been chosen and how such combinations work in corresponding societies.

Drawing on the cultural pluralist approach, cultural differences between societies and the impact of such differing cultures on social policy are examined in this research. The distinctiveness of each society in terms of its culture, if there any distinctions, does not imply any differentiation between goodness and badness or superiority and inferiority. Likewise the effect of culture on social policy in each society, if there are any effects, does not mean that certain cultures are 'better' for facilitating stronger institutionalised solidarity. Instead, it suggests that each culture is one of the driving forces for diverse welfare – trying to shape welfare policies and systems to 'better fit' (the cultural characteristics of each society).

3.3 Culture from a Quantitative Perspective - Ontological Considerations

As it has been implied in several places before, the quantitative approach is taken in this research. How can we study culture, which is a very qualitative subject, quantitatively? This naturally invites discussion about ontological issues – whether culture is something that can be 'measured', or more fundamentally, what culture is, and how we should see culture. Here we are drawing on a moderate version of the objectivist approach.

Most studies in the field have adopted the widely shared notion of culture as the values, norms and beliefs of human collectivities. Recently however, some researchers have challenged this notion. According to them, so far culture has been seen as a set of properties or traits, and actors' roles in producing, manipulating and reproducing culture has been ignored. They claim that it is a rather deterministic conceptualisation (see van

Oorschot, 2007: 136-137), or ontologically, it is objectivist. They argue that cultures have been seen 'as undifferentiated, closed and undynamic systems' which are homogeneous without any 'internal patterns of differentiation'; that attention has been paid only to external relationships between cultures and nations seen as 'natural unities' which are products of the coincidence of place, people and a shared way of life (Clarke, 2004: 31-41).

Instead, they insist that 'the cultural turn', which has been widely discussed in other social sciences and humanities since the 1970s, should also be considered by social policy analysts. Advocates of 'the cultural turn' share the strong constructionist standpoint: 'the active involvement of people in reality construction' (Bryman, 2001: 19). Culture from this perspective is constructed by social agents, and is not a stable entity but 'seem[s] prone to disturbance, flux and innovation' (Clarke, 2004: 34-35, 39) as it is constituted and recreated through interaction between people and groups (Freeman & Rustin, 1999: 16). Within culture, there are relationships between various sub-cultures, which are 'processes of domination and subordination' between social groups having different cultures. For example, a national culture is not a simple unity but a 'compound formation' where a hegemonic culture occupies a dominant place and puts other cultures into subordinate places with 'a distinctive internal ordering or structuring', although a cultural formation is an 'articulated ensemble' which is not only constructed but also contestable (Clarke, 2004: 35-38). Nations are the product of nation-building projects of dominant elites, which include the construction of national cultures: convergence into the culture of dominant elites takes place by, for example, defining 'terms and conditions of membership', deciding social position through 'exclusion, subordination and marginalisation' and 'circulating norms of social organization', all of which are in themselves 'cultural practices'. In this respect, social policies are constructed with cultural resources, or further, are themselves '*cultural phenomena*'. Since cultural resources and national cultural formation vary across both time and place, and social policies also produce cultural effects, social policies and cultural practice produce and reproduce the nation (Clarke, 2004: 36-42, italic added; Lorenz, 1999). In essence, three things are being asserted by advocates of the cultural

turn: recognition, empowerment and emancipation. The fact that the construction of social realities is subject to power relations should be recognised. Without empowering people to say or to have their voice, in other words, without reference to their own meanings and values, our account of reality would be very thin, and more importantly, likely to reproduce the dominant ways of thinking (Freeman et al, 1999; Freeman & Rustin, 1999; van Oorschot, 2007; van Oorschot, Opielka & Pfau-Effinger, 2008: 5).

However, a moderate version of the cultural turn can be 'compatible with the essence of the property approach' (van Oorschot, 2007: 137). For example, Clarke (2004: 38) does not push his argument to the extreme and admits the existence of 'immensely solidified or sedimented' culture. Similarly, Becker (1982 in Bryman, 2001: 18) accepts the pre-existence of culture shaping people's perspectives and predating their participation, while he emphasises the active role of individuals in the social construction of social reality. In response to this, the property (objectivistic) approach too, does not deny that various actors are involved in culture and sees culture not as a 'totalitarian force' but as something which is 'open for manipulation, negotiation, variety and change' (van Oorschot, Opielka & Pfau-Effinger, 2008: 5).[53]

This ontological consideration can contribute to validity and also serves as a justification of quantitative approach to culture: culture can be dealt with as, at least, a pseudo- or semi-*object* researchable through quantitative methods. Indeed, quantitative researchers, with widespread social surveys on beliefs and attitudes, have addressed 'meaning' which is commonly believed to be researchable by qualitative methods only. Moreover, survey questions can also be used to 'gain access to the point of view' of respondents and are just as good as qualitative methods in this respect. Bryman (2001: 432) points out that attitudinal questions[54] can actually be better if designed after prior questioning, and that the accessibility of qualitative methods cannot be guaranteed without respondent validation exercises (respondents' own reviews and confirmation of research results).

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[53] However, extreme versions of the cultural turn may not be satisfied only with recognition of agencies' roles, and may reject 'scientific analysis as a politically indifferent undertaking' (van Oorschot, 2007: 137).
[54] Since people's norms, beliefs and values are measurable only when those become visible, attitudinal questions are used to access to those in surveys. In this, the study of the cultural dimensions through these data is widely called analyses of attitudinal data.

The widely assumed associations between epistemological and ontological commitments and research methods – for example, culture which is understood more popularly from a relativistic-constructionist viewpoint must be studied qualitatively - should not be overstated, and in practice, they are not deterministic: instead, there has already been a 'distinctive mix' of them (Bryman, 2001: 16, 428).

Especially for comparative studies from the cross-national perspective, it is argued that the mass survey has certain advantages: unlike in-depth interviews, the huge number of cases facilitates reliable intergenerational comparisons and control for social background factors; it can provide representative national samples for cross-national comparison; and the survey results are often very accurate and reliable because of the cancelling-out effect of random error by the large samples (Inglehart, 1990: 130-131). There are ample examples of research adopting the quantitative approach to cultural dimensions, from a wide range of disciplines – for example, psychology (e.g. Schwartz & Bardi, 2001), sociology (e.g. Halman & Draulans, 2006), criminology (e.g. Halpern, 2001), political culture (e.g. Inglehart & Welzel, 2005), social capital (e.g. Patulny, 2004), and social policy analysis (e.g. van Oorschot, 2008). This research follows this tradition.

3.4 Cross-National Comparative Design

This study uses cross-national comparative analysis to assess the influence of cultural dimensions on public opinions and welfare policies. The social sciences are basically comparative (Pfau-Effinger, 2004b: 1; Ragin, 1987: 1). Moreover, culture is in itself a comparative subject. Since culture is embedded in a particular human group, region or country, it is not easily recognisable unless viewed and compared from the outside. In this sense, looking at culture is 'signifying issues of diversity and differences' (Clarke, 2004: 31). In addition, policy – another key subject of our research – is also 'inherently and indelibly' comparative. We need to refer to other societies to comprehend policy in a society (Hudson & Lowe, 2004: 248-249).

Culture is not an individual characteristic like personality, but always assumes a certain collectivity. Whilst culture can be referred to human groups of any level and any size, culture at the country level is the concern in this research. Nations are still the most complete human groups with the highest level of self-sufficiency (Parsons, 1977: 6 in Hofstede, 2001: 10). Within a nation, there are strong forces towards cultural integration – e.g. the dominant language, educational system, political system, shared mass media, markets, services and national symbols. Even in heterogeneous nations with distinctive cultural groups, the culture of the dominant and majority group can be easily recognised as the national culture (Schwartz, 1999: 25). Culture has a stronger reciprocal relationship with the state than any other level of collectivity, since the social practices through which culture manifests itself are 'politically and legally guaranteed by the state' (Zetterholm, 1994 in Freeman & Rustin, 1999: 14). Thus culture at the national level has been the most popularly researched topic within cultural studies (e.g. Arts, Hagenaars & Halman, 2003; Harrison & Huntington, 2000; Hofstede, 2001; Inglehart & Baker, 2000).

Consideration of culture at the country level is indeed somewhat unavoidable in the examination of the relationship between culture and social policy. Our 'dependent variable', social policy, is in most cases a national level phenomenon. That is the reason why researchers of cultural factors for welfare focus on nations, since countries have facilitated the development of 'the basic conception of the welfare state' from the beginning (van Oorschot, Opielka & Pfau-Effinger, 2008: 2). In addition, public opinions and attitudes, another dependent variable in our research, are also mostly societal level phenomena. Cross-country comparison is therefore fruitful both for finding cultural distinctiveness and examining the causal effect of culture on public opinions and social policy.

3.5 Data for Analysis of Values

There has been an increase in cross-national attitudinal surveys in recent decades including the International Social Survey Program (ISSP), the European Values Study (EVS), the World Values Survey (WVS) and the European Social Survey (ESS). Within

the comparative welfare literature, the ISSP, EVS and WVS data in particular have been frequently used to measure the 'qualitative' aspects of the public such as public opinions on welfare.[55] Measurement of the cultural dimensions in this research is also in debt to such surveys, especially the EVS and WVS data. Both surveys focus on people's values and attitudes, and have been conducted three (EVS) and four (WVS) times since the early 1980s. Full data of both surveys are supplied in one aggregated form covering more than 60 countries over two decades. Because of the wide coverage in terms of both time and countries, these data enable us to examine the patterns of people's values over time in different societies, if comparable measures of cross-cultural variation are constructed (Inglehart, 2000: 83).

There have been few criticisms of the sample quality of the EVS data. Inglehart (2002 in Patulny, 2004: 8-9) reports that the sample quality of the WVS data is especially high in the industrialised countries which are objects of this research. In fact, the greater reliability of these data from wealthier Western countries, where the data collection has been conducted by professional research institutes, is often praised by researchers (e.g. Larsen, 2006: 27). For correcting the sampling bias, the EVS-WVS dataset supplies weighting variables reflecting gender, age and other characteristics (Hagenaars, Halman & Moors, 2003: 213). Halpern (2001: 238) applies one of these weighting variables in his analysis and finds that it makes no significant difference to the results. In this research, the weight equivalent to 1,000 samples for each country is applied.

As discussed in the former chapter, culture and social policy are interrelated complexly with the involvement of social actors and the social systems (Section 2.3.6, also see Pfau-Effinger, 2005). Given this, it would be very difficult to find a particular impact which can be referred solely to the cultural dimension - we need to minimise the possible influence of other factors in our analysis, at least in the wider context. For this reason, countries that industrialised relatively early have been selected for this study. That is, to minimise the impact of differences in economic development in a broad context, which is one of the most powerful factors affecting all social phenomena,

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[55] All of these international attitudinal surveys are not 'panel' designed surveys.

nations which share a comparable level of economy have been chosen. Country-specific factors are required for better explanation "[w]hen a certain economic level of economic advancement is reached" (Ester, Halman and de Moor, 1993: 230 in Gundelach, 1994: 41). The countries selected achieved a certain level of economic success earlier (gained OECD membership earlier), have a longer history of social welfare policy and still remain better-off. These are 24 nations out of the 30 OECD member countries: the excluded countries are the Czech Republic (joined in 1995), Hungary (joined in 1996), Korea (joined in 1996), Mexico (joined in 1994), Poland (joined in 1996) and the Slovak Republic (joined in 2000). Additionally, Turkey has been excluded since she lags behind the other 23 countries.[56]

In other words, social policies have been introduced and developed for a longer period in these so-called 'welfare states' – the label for a certain class of democratic industrial capitalist societies that share not only an advanced level of industrialisation, but also a common conception of social citizenship, the legal provision of welfare and the principal role of the state in welfare arrangements, compared with other non-welfare states (Arts & Gelissen, 2002: 139). A comparative analysis of countries encompassing welfare states and non-welfare states, therefore, can lead merely to re-finding of the distinctive differences between those two groups, possibly concealing the impact of other factors behind the more obvious effects of economic and political factors, for example, the level of GDP and hegemonic political parties. In this respect, it would be better to compare only 'welfare states' to illuminate the effect of culture, although this may invite another kind of difficulty – most object countries probably share not a few cultural similarities as the same Western European societies.

The data of the WVS third wave is not included in this analysis. As discussed above (Section 2.4), the cultural context (collective societal values) which affects social policy is quite persistent over time. To draw stable value dimensions (or to inspect the stability of value dimensions) we need items asked continuously at different points in time,

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[56] Turkish economic development has been relatively limited, and the key economic denominators of Turkey are now even lower than the six latest-joining countries.

which constitute more comparable measures. However, there are many discrepancies in participating countries and in surveyed items between the WVS third wave and others. For this reason, only the data of the three waves of the EVS and the corresponding WVS data are taken into consideration. Our dataset still covers two decades by about a 10-year gap (1981/2, 1990 and 1999/2000). Unfortunately, there is no available data for New Zealand who participated only in the WVS third wave. Priority is given to the EVS data if a country participates in both surveys – the Spanish case. As a result, we draw on the WVS data only partly: for Australia (1981), Canada (2000), Japan (1981, 1990 and 2000), Switzerland (1989) and the US (1999). The final data set consists of 73,534 cases from 22 countries: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Japan, Luxembourg, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, the UK and the US.[57]

There are an incredible number of items - nearly 900 excluding questions about socio-demographic information - asked in both the EVS and WVS survey series. However, not all of these are suitable for this research. To inspect stability, variables should be 'traceable', in other words, available for more time points. At present, the available EVS-WVS data cover two decades from 1981 to 2000 by three points in time (the first, second and third waves of EVS, and the corresponding first, second and fourth waves of WVS). Thus, the maximum time period over which the change and stability of values can be examined is approximately two decades, given that just 90 items out of about 900 variables were asked in all three waves. Initially, these 90 items are selected as our target variables.

The process of screening each of the 90 items selected leads to further filtering out. Although the prepared data set consists of 22 countries, not all of these 22 countries have data for all three waves (table 3.5.1). This means that there will be only 53 cases

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[57] Most of the 22 countries were surveyed in 1981, 1990 and 1999 for the first, second and third waves. Exceptions for the first wave were Canada, Norway, Sweden and the US surveyed in 1982, and Iceland in 1984. For the second wave Switzerland was surveyed in 1989. For the third wave Canada, Finland and Japan were surveyed in 2000.

not 66 cases by country and wave if we conduct a culture level analysis[58] which is required for testing our hypotheses (Section 2.6 and Chapter 6). This number of cases is not ideal for any type of statistical analysis, although analysis is still possible. Given this, it is important not to miss any country of any wave for as long as possible. With this in mind, seven items with values for less than 48 culture-level cases (this is about 90% of the total 53 culture-level cases) were deselected.

Table 3.5.1 Availability of the EVS-WVS data for 22 OECD countries

Wave available	Country having data (the number of country * the number of waves = the number of culture-level cases)	
1 & 2 & 3	Belgium, Canada, Denmark, France, Iceland, Ireland, Italy, Japan, the Netherlands, Spain, Sweden, the UK, the US	(13*3 = 39)
1 & 2	Norway	(1*2 = 2)
2 & 3	Austria, Finland, Germany, Portugal	(4*2 = 8)
1 only	Australia	(1*1 = 1)
2 only	Switzerland	(1*1 = 1)
3 only	Greece, Luxembourg	(2*1 = 2)

Data for other dependent and independent variables included in analyses of the ex-ante and the ex-post effect of culture on social policy (Chapter 6 and 7) will be introduced including operationalisation in the corresponding chapters. Mostly these are drawn from the reliable data of international organisations or measured within our dataset.

3.6 Operationalising Societal Values

Part and parcel of this empirical examination of the effect of culture on social policy is the need to operationalise societal values. In order to do this, data on people's values are analysed to provide examples of societal values, which are assumed to be widely and deeply embedded in a society and quite stable over time (Section 2.4). Drawing on the approach of most studies about values and culture, we attempt to extract the value

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[58] Here we use the term 'culture level' in a slightly different meaning from 'country level' since our analysis with the pooled dataset deals with one country at different time points as different cultures. As a result, there are 22 country level cases but 53 culture level cases in our dataset.

priorities (here, societal values) of individuals by analysing data collected from individuals, and aggregate these by averaging to obtain the value priorities (here, the cultural context) characterising each society (Hofstede, 2001: 15; Schwartz, 1999: 25). On the one hand, whilst culture presumes a certain human collectivity, there is little choice but to access values through analysis of individual attitudinal data since value dimensions are seldom visible without survey tools, and analytic denominators measuring group-level (e.g. country level) cultural characteristics are few and far between. On the other hand, individual values reflect the culture of a collectivity to which a person belongs since they are the product both of 'unique individual experience' and of 'shared culture'. Thus the average of individual values of members of a society can be expected to show cultural values – 'the central thrust of their shared enculturation' (Schwartz, 1994b: 92; 1999: 25-26).

3.6.1 Cultural dimensions in the existing research

Some may ask, before we move on to discussing the details of the analysis, whether the value dimensions in existing literature can be used as examples of societal values. We also need to examine this to create a theoretical framework for our analysis of societal values. There are some value dimensions which have been widely used to explain the variation of public opinions (situational values) in existing research, such as egalitarian ideology, political stance and post-material values. These have often shown significant explanatory powers for welfare attitudes (see Section 2.3.3).[59] Yet, the stability of the dimensions has rarely been tested – mostly data of one time point have been analysed.

We tested the stability of these cultural dimensions in existing works using a simple device. Our assumption that the cultural context is stable does not mean we believe that it is immutable – we argue that the cultural context is changeable, but it will only change gradually. If this is true, the differences in the cultural context between societies would be maintained (stable) at a certain level (Hitlin & Piliavin, 2004: 375). Our tests were conducted through a descriptive method and a simple measure of correlation between

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[59] For example, it is reported by Gelissen (2008: 259-260) that 'people's political convictions are an important predictor of their beliefs about welfare-state politics'. The degree of conditionality of people's solidarity is also found to be dependent upon their political stance (van Oorschot, 2000).

the ranks of countries at differing time points. The criterion of stability in terms of the rank correlation coefficient will be discussed later (Section 3.6.4).

Firstly, our simple test showed that the egalitarian ideology by a popularly applied measurement was not so stable over time in terms of the degree in each society. This dimension has been widely measured based on one item asking respondents' views about whether incomes should be made more equal or if larger differences as incentives were needed by a 10-point scale. For country level egalitarianism, the average value of each society has been used. We applied the same method and inspected the level of egalitarianism within 12 OECD countries drawn from the 1990 and the 1999/2000 EVS and WVS data (within our dataset of 22 OECD countries, only these 12 societies were surveyed with this item at both time points). The level of each society's egalitarianism appeared to change rather wildly for a decade (Figure 3.6.1) with complex crosses between lines. The correlation between ranks of countries by the degree of egalitarianism at two time points was also very low (0.091)[60] regardless of the statistical insignificance of the coefficient - a small number of cases could lead to insignificant outputs.

Figure 3.6.1 Changes in the level of egalitarianism in 12 OECD countries over a decade

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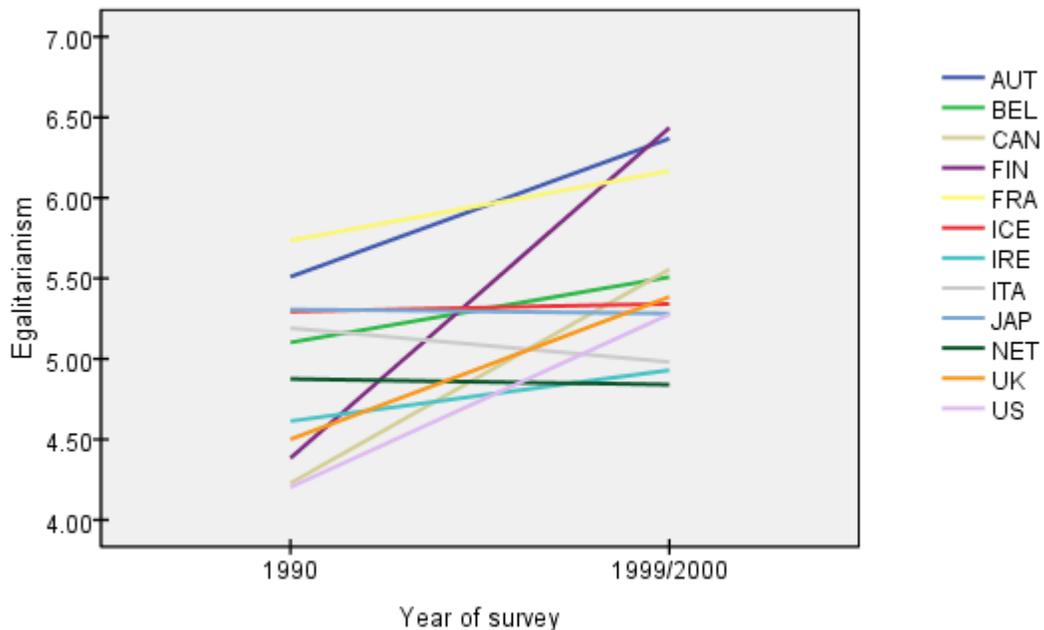
[60] This is using Kendall's method (tau-b).

Egalitarian ideology should be, conceptually, a more stable trait than people's attitudes toward specific welfare policies and issues according to researchers who have used this dimension as an explanatory factor (e.g. Blekesaune & Quadagno, 2003: 418). The result of our simple test implies that, however, people's answers towards the question of income inequality are dependent upon situations rather than stable enough to show an aspect of the cultural context of each society. It appears that the extent of egalitarianism is not properly captured by this one item about views on income equality.

Secondly, the stability of the self-measured political stance was tested by the same methods. This dimension has also been popularly measured in various surveys based on one item. For example, in the EVS and WVS questionnaire respondents are asked, "how would you place your political views on this scale from 1 (left) to 10 (right), generally speaking?" Again, we examined the country means of the 13 OECD countries which participated in all three waves of the EVS-WVS survey.

Figure 3.6.2 Change in the average political stance of 13 OECD countries over two decades
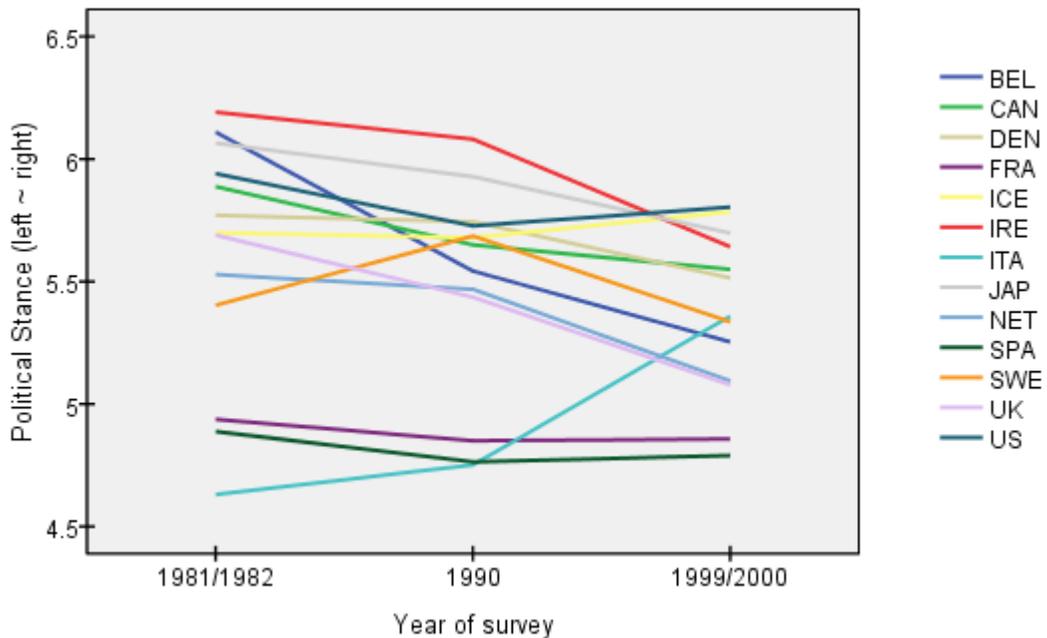
Lots of crossed lines were also found (Figure 3.6.2) implying that differences in the political conviction of the various societies were not well maintained - nevertheless, compared with the case of egalitarian ideology above, it appeared relatively more stable. Examination of the rank correlation (in this case, between ranks at 1981/2 and ranks at 1999/2000) also showed that political stance might be a more stable value than egalitarian views with a coefficient of 0.436 (statistically significant at the 0.05 level with only 13 cases). However, this correlation coefficient is also not large enough to meet our criterion (0.7) which will be discussed later (Section 3.6.4). Beyond this, there is a concern about the comparability of this value – "what being on the left (right) means may depend upon the region where one lives" (Blekesaune & Quadagno, 2003: 418). In other words, whether people's notion of political left or right is the same across societies is not testable. While this is a problem not completely soluble in a comparative study of values, we think measurement of a certain value based on one item is more problematic – because there is no supplementary way for examining whether a value is based on at least similar notions. This will be discussed further below (Section 3.6.3).

Figure 3.6.3 Change in the post-materialist values of 11 OECD countries over two decades
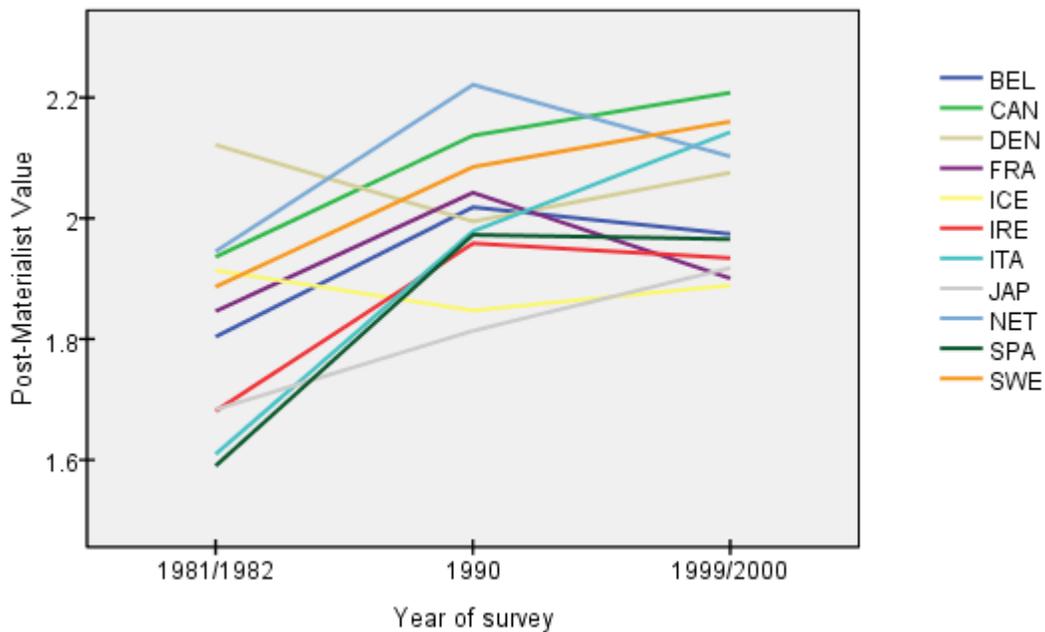
Finally, the post-materialist value suggested by Inglehart (1977; 1990) was examined. It is reported that individual opinions on the reasons for poverty are dependent upon post-materialist values (van Oorschot & Halman, 2000). We used the post-materialist value index offered by the EVS-WVS aggregated data, which was based on four items. Here again, the post-materialist value appeared not to be one of stable societal values. Our simple data analysis between 11 OECD countries showed that the differences in levels of the post-materialist value orientation between countries were not stable (Figure 3.6.3). The rank correlation coefficient was also very low (0.093). This does not mean that the validity of Inglehart's argument - the rise of post-materialist values within the Western industrialised countries – is in question. We agree that there can be change in values (certain aspects of culture). Instead, on the one hand, it rather shows that the post-materialist value is dependent upon situations such as economic development, as Inglehart (1977: 39) points out. On the other hand, more importantly, it shows that the post-materialist value can hardly be a stable explanatory variable for other concrete social phenomena such as social policy, especially in empirical analysis.[61]

Our attempt to obtain examples of societal values as well as theoretical guidelines for the analysis of values by drawing on the cultural dimensions in existing empirical works was not successful. These dimensions are neither stable over time nor comparable across societies. This leads us unavoidably to analyse the data on values in an exploratory way. One of the most widely used tools for analysing attitudinal data in psychology and social policy is the factor analysis technique - we also apply exploratory factor analysis here.

3.6.2 An exploratory data reduction technique (Principal Component Analysis)

Factor analysis is a statistical technique which enables us to identify groups/clusters of variables and to substitute these groups with fewer new variables, based on correlations. Or, more simply, it is a tool for finding explanations of correlations within a certain set of variables. If there is a set of items which are rather strongly correlated with each other,

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[61] The post-materialist value, as a universal value, may have the explanatory power which is historical (abstract) not analytic. This is clearer for the case of 'Survival vs. Self-expression value' which is the advanced version of the post-materialist value (Inglehart & Baker, 2000).

then it is possible that some aspects captured in common by all items in the group are the causes of such correlations. These common dimensions between a certain set of variables can then replace (or represent) the set of variables. Such dimensions in common are called underlying dimensions or latent factors (so the name of the technique is factor analysis). By finding these latent variables, we can understand the structure of the relationship between variables as well as reduce the size of a dataset into a smaller set of factors with minimum loss of original information (for more technical discussion about factor analysis, see Field, 2005; Kim & Mueller, 1978; Kline, 1994). Since factor analysis offers each case's score on each factor (data value for the new variable – factor), researchers using this technique can use latent factors as variables. In this, factor analysis is one of the popularly used statistical techniques for attitudinal data – concrete attitudes can be abstracted into underlying ideas, beliefs and values.

Principal Component Analysis (PCA), one of the most widely used factor analytic techniques (e.g. Hagenaars, Halman & Moors, 2003), is applied in this research in an attempt to find underlying values by factor analysing people's answers towards various value-related questions. The process of analysis is exploratory – there are no assumed underlying factors (societal values) before analysis, which is called the exploratory factor analysis. The process of grouping items for factor analysis – since factor analysing all the relevant items at once and extracting underlying dimensions is neither practical nor realistic – is not guided by certain presumed theoretical concepts (e.g. egalitarianism). In other words, we do not select certain items for drawing a particular theoretical concept through factor analysis. We saw above (section 3.6.1) that existing examples guided by theoretical concepts were not satisfactory in terms of the stability - theoretical concepts (e.g. egalitarianism) appear not to be properly captured by attitudinal survey items (e.g. the question on the income equality). Instead, items are categorised based on correlations between each other, and then each cluster is factor analysed.

It has been said that there is a fatal flaw in exploratory factor analysis: the 'garbage in, garbage out' rule because of the arbitrariness of selecting items to put in the analysis.

Even the 'catch-all analysis', which means 'putting all items in', can lead to trivial results with little insight into society, in spite of the possibility of lessening problems of arbitrariness (Hofstede, 2001: 32-33). In reality, however, survey-based quantitative research has often been more exploratory than theory-testing. Complaints by some researchers that it is not easy 'to appreciate the degree to which findings frequently suggest new departures and theoretical contributions' with theory-testing quantitative studies only (Bryman, 2001: 434-435) are also encouraging our attempt.

3.6.2.1 How many underlying factors should be extracted?

Decisions of how many underlying dimensions should be extracted will be made mainly by examination of 'scree-plots' and if necessary supplemented by inspecting numerical 'eigenvalues'. So-called 'eigenvalue' shows how much variance of input items can be explained by the correspondent factor. It can be calculated by adding squared factor loadings of each item on that factor, or in other words, it is the sum of 'communalities' of each item with that factor. In normal situation, if the number of input variables is five, for example, then with five factors all the variance of input variables is explained. This is another way of saying that the sum of eigenvalues of five factors should be five. However, as the aim of factor analysis is finding fewer underlying dimensions (in other words, data reduction by lowering the number of variables), generally only a few factors of distinctively higher eigenvalues are extracted.

Since the decision of how many factors should be extracted is a crucial but another arbitrary part of factor analysis, the scree plot test is widely used to find out how many factors show distinctively higher eigenvalues with the help of 'graphic' description. The plot thus shows the eigenvalue of each factor. In many cases, it is clear graphically how many factors are representing distinctively more information – in other words, explaining a greater proportion of the total variation of all input variables. In Figure 3.6.4, it is clear that the explanatory power of one factor in Type 1 and two factors in Type 2 is distinctively larger than that of the other factors. In Type 3, however, while the first factor shows a clearly larger eigenvalue, the slope between the second and the third factor is also different from the slope between the third and the fourth factor showing

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that the second factor can also be important. In such a case, the conventional criterion of the eigenvalue over 1 is applied in this research.

Figure 3.6.4 Examples of scree plots in factor analysis
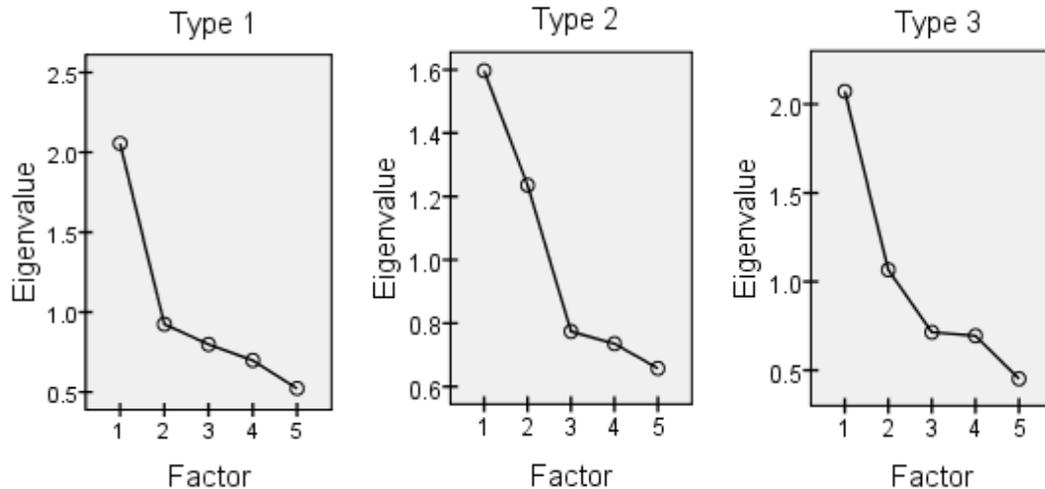
3.6.2.2 The scales of measurement issue

Variables in quantitative data can be differentiated by the nature of their measurement: nominal, ordinal and cardinal variables. Nominal variables have answer categories each of which represents a qualitatively different feature – for example, variables for gender, regions and religions. Answer categories of ordinal values show the degree of a certain feature in order – ranks is an easy example. Finally, cardinal variables have continuous values at least within a certain range – we can think about age and income. Here, having continuous values is critical in statistics since it means that the feature captured by a cardinal variable can be fully 'quantified'. In other words, for example, only cardinal variables can have the means, standard deviations and variances which are bases for many statistical techniques including correlation, because these assume the equal 'distance' between answer categories. As for nominal variables, however, we cannot assume that the distance between being a Protestant and being a Calvinist and the distance between being a Calvinist and being a Buddhist is the same, and as a result, there cannot be the mean between being a Protestant, Calvinist and Buddhist. This is the

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same with ordinal variables – even though ranks are often expressed in numeric values, strictly speaking, distances are qualitative not quantitative (differences between the first and second ranks and between third and fourth ranks, for example, cannot be equal).

Surveys on values, attitudes and perceptions often use either Likert-scale questions which have four or five ordinal answer categories – such as 'strongly agree', 'agree', 'disagree' and 'strongly disagree' - or dichotomous variables which have only two answer categories of 'yes' and 'no'. For these types of variables, and as we discussed, the range of applicable statistical techniques is not wide. In principle, factor analysis also requires cardinal variables, as it is based on correlation or covariance matrices. However, ordinal variables with numeric values are often regarded to reflect, to some degree, the underlying true distance – that is, we can roughly assume that differences between 'strongly agree' and 'agree' and between 'disagree' and 'strongly disagree' are equal. Drawing on this, Kim and Mueller (1978: 73-75) suggest that using ordinal variables in factor analysis is acceptable when the distortion of correlations is believed to be insubstantial. Further, within limited conditions they see that even dichotomous variables can be used in factor analysis. Suggested guidance in other places is more generous. For example, dichotomies are generally seen as acceptable if there are large samples (Kline, 1994: 125-139). In practice, there are lots of examples of ordinal and dichotomous variables being used in factor analysis including rather official research with the EVS data (e.g. Hagenaars, Halman & Moors, 2003)[62] and with the WVS data (e.g. Inglehart & Baker, 2000) and research within Psychology (e.g. see Kline, 1994). We are guided by these theoretical and empirical studies.

3.6.2.3 Factorable correlations, multicollinearity and sampling adequacy
Correlations between items of each group are examined to inspect whether variables of each group are 'factorable', in other words, whether there are 'sizable' correlations between them. The general recommendation is the existence of correlations exceeding

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[62] They explored cultural mapping based on the EVS data through factor analytic techniques, even with recoding missing values into the middle value between answer scales (e.g. recoded 0 into 2.5 in a 5 point scale item).

0.30 in the correlation matrix - especially between variables which would extract a factor together (Tabachnick & Fidell, 2007: 614). However, a more generous criterion (0.1) is adopted in this research since the number of cases is much larger than normal (text-book) factor analysis examples. As is widely known, the greater the number of cases, the lower the correlation coefficients. The Bartlett's test (or Bartlett's test of sphericity)[63] which examines whether every variable correlates very badly (or not at all) with all other variables would partly make up for this. If all variables are nearly independent from one another, then no clusters, and as a result, no underlying factors would be found. This was examined in every PCA of this research including sensitivity analyses and no problems were found.

Too high correlations can also be problematic in factor analysis - an issue which is known as multicollinearity (when variables are very highly correlated) or singularity (when variables are perfectly correlated). Examination of the determinant of the correlation matrix is a way to test this[64] and was conducted whenever we did PCA including sensitivity analyses and proved to be good enough. Since the number of cases is large enough, there is not much concern about sampling issues, let alone the fact that the EVS-WVS data are rather verified ones in terms of sampling problems especially data for so-called advanced capitalistic countries. However, Kaiser-Meyer-Olkin's measure of sampling adequacy[65] was conducted for each analysis and every result is good enough (showing far greater than 0.50).

3.6.2.4 The factor rotation

Factor analysis usually rotates factors. This method is for facilitating interpretation of what each factor means. The basic rationale is, if there are two factors and we can

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[63] This test examines the hypothesis by Chi-Square test that the correlations in a correlation matrix are zero (more technically, if the correlation matrix is an identity matrix). This null hypothesis was rejected at the significance level of 0.005 in the test of every group.

[64] Generally, if the determinant of R-matrix approaches 0, it means there is a problem of multicollinearity or singularity. Conventional recommendation is the determinant greater than 0.00001 (Field, 2005: 641).

[65] This calculates the ratio of the squared correlation between variables to the squared partial correlation between variables. The value ranges from 0 to 1, and a value close to 0 means diffusion in the pattern of correlations, which would not be good for factor analysis. Kaiser (1974 in Field, 2005: 640) saw values greater than 0.50 as acceptable.

represent input variables in a space (factor space) with two axes of factor 1 and 2, by rotating axes (or it can be said, rotating factors) the meaning of factors can be clarified with altered factor loadings of variables on each factor (correlations of variables with each factor – some variables would become closer to a certain axis) without changing the original correlations between variables. For a simple example, if there is a variable α and β, and α is loaded, say, on factor X by 1 unit and on factor Y by 1 unit in the factor space, then rotating axes by an angle of $45°$ toward α would change the loading of α on each factor: now it is about 1.4 unit on factor X and about 0.7 unit on factor Y (according to Pythagoras' theorem). Consequently, interpretation of factor X would be easier (more determined by α) and there is no change in correlation between α and β.

There are two kinds of rotation – orthogonal and oblique. The orthogonal rotation assumes that factors are not correlated at all and factors should rotate only orthogonally – the assumption is probably unrealistic but the method is easier to understand and use. The oblique rotation assumes that factors are correlated and the factor axes can take up any position in factor space – the assumption is logical but complex to understand and interpret (for more details, see Kim & Mueller, 1978: 29-41; Kline, 1994: 56-79). In this research, however, the rotation method is not of great importance since factor analysis mostly extracts only one factor and our final results are not drawn through factor rotation – but, whenever applicable, the varimax rotation, which is one of the orthogonal rotation methods, is applied and sensitivity analysis is conducted by one of the oblique rotation methods.[66]

3.6.2.5 The risk of repeated application of factor analysis

Meanwhile, we discussed above (Chapter 2) why we should not 'dig too deep' into the more fundamental value dimensions. It is argued that a conception of culture at the very abstract level such as universal values and basic human values is not so fruitful in empirical examinations, since the causal impact of such abstract cultural dimensions would be unavoidably historical (abstract). On the one hand, there is the risk of oversimplifying diverse cultural dimensions and social characteristics - Gundelach (1994:

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[66] No significant differences were found.

55) argues that an analysis focusing on diversity would be better than an analysis condensing different value types into one measure. On the other hand, , the fundamental value dimensions tend to be dependent upon the economic dimensions (Section 2.4.2), which can be partly explained technically, especially with the 'dimension condensing' technique (factor analysis) applied in this research. Since factor analysis is based on the correlations between (or, covariance of) items, if it is used more than once (so that dimensions are more intensively condensed) to extract more fundamental dimensions then these more underlying dimensions can reflect certain powerful social factors more strongly. Put differently, the repeated process of extracting the underlying dimensions can be the way to find certain factors correlated with almost all items in the data set – for the social survey data, probably these are economic or interest dimensions.

We tested this in a simple manner with our prepared 83 items within the EVS and WVS data. These items were grouped based on correlation between each other and each group is factor analysed. There were 19 underlying factors found, from which two underlying dimensions could be extracted by further factor analysis. We examined correlations of these factors with a variable of income level at each step. The result showed that the more condensed the underlying dimensions between attitudinal data were, the stronger correlation was with the individual income level (Table 3.6.1). In the first row of the table, we can see that a respondent's frequency of attending religious services is almost completely uncorrelated with her/his income scale. When we extract an underlying dimension (say, religiosity – the second row in the table) from 10 items including the item of church attendance, this dimension shows a slightly larger correlation coefficient with the income level. Finally, two underlying dimensions can be extracted from 19 variables including religiosity, all of which are drawn as underlying factors from factor analysis of different sets of items within the same data.[67] These two dimensions are rather highly correlated with the income level (the third and fourth row in the table) – correlation coefficients about 0.2 are not weak given that our number of cases is over 8,000 in this test.

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[67] All of these 19 underlying dimensions including religiosity were correlated weakly with the income level, mostly showing correlation coefficients below 0.1.

Table 3.6.1 The increase in correlation with the income level by repeated factor analysis

	Correlation coefficient with individual income level
Frequency of attendance to religious services (1 ~ 8 = never)	0.029
Religiosity (an extracted variable by factor analysis of 10 items including the church attendance item above)	0.070
Dimension A by further factor analysis of 19 underlying variables including religiosity	0.174
Dimension B by further factor analysis of 19 underlying variables including religiosity	0.234

All correlation coefficients are significant at the 0.01 level.

This simple test reminds us of that factor analysis is merely a tool and that each item of attitudinal data reflects not only the value-dimensions but also the situation-dependent dimensions. Underlying factors we draw from the social survey data through factor analytic technique can show either value-dimensions or other dimensions shared by a certain set of items correlated with each other. Moreover, underlying factors explaining the correlation between almost all items of the social survey – in other words, certain factors relevant to almost all items to any degree, which are extracted by the repeated application of factor analysis, reflect situational considerations (e.g. socio-economic factors) more than value dimensions. The high covariance of socio-liberal values in Hagenaars and his colleagues' work (Hagenaars, Halman & Moors, 2003) with economic wealth can be partly explained by this – they extracted two dimensional basic values of Europeans by applying factor analysis repeatedly. For this reason, the further condensing of underlying dimensions is attractive but not attempted in this research.

3.6.3 A post-hoc pursuit of equivalence for comparability

When we examined the stability of the political conviction of societies (Section 3.6.1) we questioned whether being on the political right (left) had the same meaning across countries. This shows that the comparability of measures is critical in comparing culture (Schwartz, 1994b: 94). For example, Svallfors (1997: 287) and Larsen (2006: 26) point out that there is an 'immanent danger' of artefacts in comparative attitude research

because of different meanings and connotations of various concepts across nations. Although the data set used in our analysis is collected from the internationally designed questionnaire equivalent across countries, it is still questionable whether underlying values, if we extract any, have the equivalent meaning across time and place. For this reason, we inspect whether underlying factors can be interpreted (regarded) as the same values in any country at any time within our data.

In more technical terms, it is investigated whether variables heavily loaded on an underlying factor are the same across different data sets by country and wave. It is suggested that the comparability or equivalence of the individual-level datasets across countries can be examined by comparison of the factor solution in each country with the structure found in the pooled dataset (van de Vijver, van Hemert & Poortinga, 2008: 17, 21). If there is a certain cross-cultural difference (e.g. distinct notions of certain concepts because of differing historical and social contexts) hidden by the pooling, then the outputs of factor analysis of each country's dataset would not be the same. In addition to this, we investigate the comparability across time since there can be cross-temporal difference in notions. Examples show this more clearly.

Table 3.6.2 Differing factor solutions of 8 politics-related items in Germany and the UK

Input Variables	Factor Loadings			
	Germany Factors		UK Factors	
	1	2	1	2
Joining in unofficial strikes[a]	**.804**	-.021	**.715**	-.078
Occupying buildings/factories[a]	**.798**	-.036	**.721**	-.012
Political stance (1=left ~ 10=right)	**.405**	.040	**.511**	-.327
Joining in lawful demonstrations[a]	**.538**	.529	**.704**	.341
Joining in boycotts[a]	**.648**	.308	**.681**	.342
Signing a petition[a]	.323	**.575**	**.387**	.212
Interest in politics (1=not at all ~ 4=very)	-.022	**-.816**	-.055	**-.828**
How often political matters discussed[b]	-.072	**.791**	.088	**.773**
Explained Variance	28.3	25.0	30.1	20.9

Data: EVS; By PCA (Principal Component Analysis) with varimax rotation.
[a] Answer categories: 1 = Have done; 2 = Might do; and 3 = Would never do.
[b] Answer categories: 1 = Never; 2 = Occasionally; and 3 = Frequently.

If we factor analyse eight politics-related items (within our initial set of 83 variables) with the pooled (three waves of 22 countries) dataset, two underlying dimensions can be extracted, of which the factor loading structure is similar to that of the German case (the second and third columns) in Table 3.6.2. With the first factor, five items of whether respondents may participate or have participated in some kinds of political protest except signing petitions are loaded heavily, whilst on the second factor three variables - how much interest in politics a respondent has, how often the respondent discuss politics with friends and whether the respondent may participate or has participated in singing a petition – are highly loaded. This result is not altered when the same factor analyses are conducted with datasets by each wave. However, if the same factor analysis is conducted with datasets of each country, the factor solution is not the same (see the UK case in Table 3.6.2) strongly implying that some notions involved in these 8 items vary across countries. For example, the meaning of 'signing a petition' appears not to be the same in German and British societies.

Table 3.6.3 The Belgian example of changing factor loading structure of 8 politics-related items over time

Input Variables	1981/1982		1990		1999/2000	
	1	2	1	2	1	2
Unofficial strikes	**.796**	.201	**.796**	.148	**.781**	.059
Occupying buildings or factories	**.814**	.229	**.773**	.203	**.778**	.114
Self positioning in political scale	**.507**	-.102	**.621**	-.292	**.502**	-.155
Joining in boycotts	**.539**	.493	**.678**	.389	**.615**	.352
Lawful demonstrations	.499	**.607**	**.670**	.413	**.627**	.406
Signing a petition	.269	**.693**	.384	**.524**	**.424**	.368
Interest in politics	.071	**-.791**	-.123	**-.815**	-.080	**-.855**
How often political matters discussed	.053	**.719**	.035	**.801**	.025	**.842**

By PCA (Principal Component Analysis) with varimax rotation.

Even more problematic is that analysis of each country's data by each wave reveals certain notions are changing over time (Table 3.6.3). For example, the Belgian view in the 2000s about attending lawful demonstrations and signing petitions is probably different from what it was in the 1980s. As a result, underlying factors extracted from

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these 8 politics-related items within our dataset cannot be comparable across cultures. This inspection of comparability across time and place is applied for all underlying values drawn from each set of variables in our analysis (Chapter 4), and items including different or changing notions across cultures, if there are any, are discarded.

3.6.4 The aggregation problem

In the meantime, the validity of aggregation is also questionable. When we examined the stability of the political stance of societies above (section 3.6.1), we used the average value of individual political stance for each society. Yet, do the country means of individual political stance show the precise level of political conviction in each society? For example, it has been pointed out that there can be two validity issues in aggregation: the applicability of scores at other levels – applying scores from one level to another level can easily lead to invalid interpretation - and the possible shifts in meaning, as individual differences in scores can have different meaning across countries (van de Vijver, van Hemert & Poortinga, 2008: 14-15). Whilst the latter is relevant to the comparability issue above (Section 3.6.3) and expected to be partly overcome by our test, the former is related to the 'cross-level fallacy'. Before discussion about the cross-level fallacy, a brief justification of our analysis of the individual level data for comparing cultures, drawing on the relevant literature, is required.

Cross-cultural comparisons mostly use data collected from individuals and characterise a society by aggregating individual scores (Hofstede, 2001: 16; Schwartz, 1999: 25). Individual values are the product both of shared culture which is accepted through socialisation and of unique individual experience and personality (Schwartz, 1999: 25-26). Thus the averaged values of societal members reflect cultural values – 'the commonalities in the intentional and unintentional value socialisation' – with some individual variation (Schwartz, 1994b: 92). Beyond this, aggregating individual-level data is also a kind of unavoidable choice in cultural analysis. Data on cultural dimensions mostly exist at the individual level (i.e. attitudinal data), but individual level scores cannot be confirmed as cultural characteristics until aggregated at a certain level

(and compared) since culture inherently presumes a certain human collectivity. If this is the case, aggregating to the country-level would be better done in the way discussed above, taking into account the appropriateness of studying culture at the national level (Section 3.4).

The 'cross-level fallacy' encompassing the 'ecological fallacy' and the 'reverse ecological fallacy' means that we cannot apply a relationship found at a (dis)aggregated level to another level. It has been widely known since Robinson's (1950 in Inglehart & Welzel, 2003: 61) study that certain relationships presented at the ecological (societal) level are not necessarily reproduced at the individual level – this misinterpretation is often very attractive because correlations tend to be clearer at the ecological level. From a technical point of view, since there are fewer 'outliers' (extremely deviant cases) as well as fewer cases at the ecological level, a stronger correlation can be presented by analysis at the collective level than by analysis at the individual level. This is more so when individual level data are aggregated at the collective level because of the 'cancelling out' effect between outliers by the process of averaging.

For example, let us assume two societies A and B which are found to be different in terms of 'collectivism' (stronger collectivism orientation in society A) at the country level. Then we cannot say based on this result that an individual in society A has stronger collectivist ideas than another in society B. What we find is a kind of collective level phenomenon and we have no information about individual members at all. Furthermore, even if a correlation is found between the level of collectivism and the generosity of welfare (more generosity in the more collectively oriented society) at the societal level, it cannot be argued that individuals with stronger collectivist tendencies are more likely to support generous welfare until this is confirmed by analysis at the individual level – we do not know whether individualistic individuals in collectivist societies tend to support more generous welfare. Cultures are 'not king-size individuals' and their internal logic cannot be understood with the terms for individual characteristics (Hofstede, 2001: 17).

Whilst this cross-level fallacy is a matter of the cautious interpretation of research findings (Hagenaars, Halman & Moors, 2003: 24-25) there is a more fundamental challenge to cross-cultural comparisons that use aggregated scores drawn from individual data. As Hofstede points out above and as Schwartz (1994b: 92-93) argues as well, if the individual-level values and the culture-level values have different internal logics and conceptual bases because the universal requirements for individuals and societies are different (section 2.4.2), the cross-level equivalence can be questioned: how can the aggregated individual data properly reveal aspects of culture? We may need to examine to what extent factors found at one level can also be found at another level (van de Vijver, van Hemert & Poortinga, 2008: 18).

Some researchers may insist more strictly that the value characteristics of societies (that is, the collective level values) must be drawn only from the 'culture-level' analysis (e.g. Schwartz, 1994b, 1999). However, we see that verifying the 'aggregated' value dimensions by comparison with value dimensions drawn from the culture level analysis – a kind verification process called sensitivity analysis - is sufficient. As Schwartz himself admits (1994b: 92-93), the individual level values and the culture level values must be mutually related conceptually – both should reflect each other – and must overlap to some degree. In addition, there is a practical reason. The culture-level analysis unavoidably suffers from the small number of cases – mostly the number of cases (countries with available data) is unlikely to be over 40, which would make it difficult to assert the robustness of the results from any statistical techniques. Part of the reason why researchers have multiplied the number of cases of their analyses through differentiating groups within a society by jobs (Schwartz, 1994b, 1999) and by age (Hagenaars, Halman & Moors, 2003) would be for the purpose of sensitivity analysis – verifying their country level analysis by the group level analysis of a far larger number of cases. At the same time, since the culture-level analysis has tried to include as many countries as possible, very often countries distinctively different in terms of economy and politics have been analysed together. There have been findings showing a clear difference in a certain cultural dimension between economically and politically differing country groups (e.g. Inglehart & Welzel, 2005: especially, Ch. 2), but there appears to be

controversy over whether such a difference can be assigned only to the impact of cultural difference, that is, the cultural dimensions in these studies are quite independent of economic and political contexts (see Section 2.4 and Section 3.5).

In addition, the 'societal values' we try to map are not the 'basic values' in psychology which reflect our need to respond to basic requirements. If society has its own internal logic for survival and needs to meet the basic requirements, the very basic values of society should be found by an analysis at the collective level. What we want to explore is not such universal, fundamental and abstract values. It is more individual-oriented but widely shared values in a society for a long (to a certain degree) period. Moreover, if 'standardi[sing] the data per culture prior to the factor analysis' can affect the factorial structure and may standardise the outcomes too (van de Vijver, van Hemert & Poortinga, 2008: 16), the culture-level analysis cannot be the best way of drawing cultural values. In this research we will map underlying values at the individual level, aggregate these to obtain culture-level value characteristics and verify this – test the cross-level equivalence - by comparison with results from the sensitivity analysis at the culture level. The result of this comparison will be presented (Chapter 4).

3.6.5 The examination of stability

It is reasoned above (Section 2.4) that the cultural context for social policy making is the cultural dimensions (according to our conceptualisation, societal values) which are embedded widely and deeply in society and stable over time (van Oorschot, 2006: 24). On the one hand, this does not mean that the cultural context is fixed and immutable. Culture, including values, changes. Rather it implies that the cultural context may be 'dynamically stable than static', or in other words, 'permanent enough to' enable us to predict consequences (Oyserman & Uskul, 2008: 149-150). On the other hand, stability of the cultural context is not an individual level but a collective level phenomenon. Put differently, whilst the societal values individuals hold can change rather rapidly (according to individuals), the aggregated societal values as the cultural context of a society are quite stable over time.

As a result, the stability of the cultural context needs to be examined at the collective (country) level. The stability of the cultural context needs to be inspected not by static scores but by 'dynamically stable' scores of measures. In our research, such dynamical stability is examined by the stability of the differences in the cultural contexts (aggregated societal values) between societies over time. Like culture, 'cultural differences are relatively enduring, but not immutable' (Inglehart, 1990: 15). If a certain underlying dimension is not one of societal values which collectively form the cultural context stable over time, the scores of each country for the dimension at different time points may fluctuate wildly, and differences in that value between countries may change wildly too. Conversely, if a certain underlying dimension is one of societal values, then scores of each country for the dimension at different time points may stay at a relatively similar level and the gaps between countries in terms of that dimension are likely to be kept over time to a certain degree. For this, we examine the correlation between ranks of countries at differing points in time.

There is no clear cut-off point of the rank correlation coefficient for stability and instability of differing cultural contexts across countries. Drawing on Hofstede (2001) but in a more conservative manner, we apply the criterion of the rank correlation coefficient of 0.7. Hofstede (2001: 53) sees a Spearman's rank correlation coefficient exceeding 0.5 as showing a reasonable level of stability.[68] We will use Kendall's method – since the two different methods are based on different formulae we cannot compare both directly, nevertheless, in most cases the rank correlation coefficient obtained by Kendall's method is lower than that by Spearman's method.[69]

In addition, we need to consider the fact that the number of cases in examination of the rank correlation will be small in this research – since the correlations of countries' ranks

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[68] He examined the rank correlations (by Spearman's rho) of country means between the first and the second survey round.

[69] Briefly speaking, Spearman's method considers the actual differences in ranks (numerical values) whilst Kendall's method looks at the concordance and discordance (the number of concordant and discordant pairs). In other words, coefficients by the latter method are relatively 'standardised' and are likely to be smaller than coefficients by the former method.

by levels of societal values between the first wave (1981/2) and the third wave (1999/2000) are inspected, the number of countries having data for both waves are about nine to 13. This small number of cases can cause relatively large correlation coefficients. In this, although a coefficient equal to or over 0.50 by Kendall's measure is regarded to show 'strong' correlation conventionally, we apply the rank correlation coefficient of 0.70 as our criterion – under a rough linear relationship assumption, this means that with country ranks in 1981/2 we can explain about 50 percent of variance in ranks in 1999/2000.

Finally, the process of extracting examples of societal values from the data can be graphically summarised as shown in Figure 3.6.5 below.

Figure 3.6.5 The flow chart of the process of analysing values' data to extract examples of societal values

The EVS-WVS data of three waves for 22 OECD countries : about 900 items, 73,534 cases (53,000 cases with weight)

83 items selected (which have been asked in all three waves)

10 Groups emerged based on correlations between 83 items

Analysis of each group

The initial PCA

1) PCA with the pooled dataset	◀

Extract underlying dimension(s)

C o m p a r a b i l i t y   T e s t

2) PCA with datasets of each wave

Find the same dimension(s)	Find different dimension(s)	Discard the item(s) including changing notions over time

3) PCA with datasets of each country

Find the same dimension(s)	Find different dimension(s)	Discard the item(s) including different notions across countries

4) PCA with datasets of each country by each wave

Find the same dimension(s)	Find different dimension(s)	Discard the item(s) including different/changing notions across time and country

Cross-level equiva-lence Test

5) PCA at the culture level

Find the same dimension(s)	Find different dimension(s)	Discard the item(s) causing the cross-level non-equivalence

Stabili-ty Test

6) Examination of the rank correlation at the country level

Stable over time	Unstable over time

Deci-sion

Accepted as societal values	Drop the group

3.7 Chapter Concluding Remarks

The study of culture, especially using a quantitative approach, appears to raise epistemological and ontological issues. It does not match the conventionally assumed associations between research methods, epistemological and ontological viewpoints. It also seems that a culturally relativistic approach is required to avoid the risk of ethnocentrism which can easily occur in a cultural study. Drawing on the standpoint of cultural pluralism and moderate objectivism offers a direction for this research to proceed. Given that culture has been mostly studied and compared at the national level and that social policy is also a country-specific phenomenon in most cases, it is suggested that the aim of this research – examination of the effect of the cultural context on social policy – would be better pursued by a cross-national comparative design.

In this chapter, discussion about the research method is focused on the methods applied in the analysis of multicultural attitudinal data since how to operationalise the societal values introduced through conceptual discussion (Chapter 2) is part and parcel of this research. In short, data on people's values covering two decades from 22 of the most industrialised OECD countries and drawn from the EVS and the WVS is analysed by an exploratory factor analysis technique. Items repeatedly asked in all of three waves of the survey series are grouped based on the correlations between them, and factor analysed by groups. The comparability across not only place but also time of underlying dimensions extracted from factor analysis is examined through comparison of factor solutions by datasets of each country, each wave and both. The stability of underlying dimensions is inspected by the rank correlations of countries over two decades. The applicability of the underlying dimensions across levels (individual and country level) is investigated by comparing factor solutions at both levels.

In terms of analysis method, this operationalisation process introduces some new suggestions. Firstly, the equivalence of measure (comparability) which has mainly been an issue at the stage of developing cross-culturally applicable questionnaires is attempted through a post-hoc empirical examination. By this process we found that it is not only people's notions differing across counties that matters but also changes in

notions over time within the same culture. Secondly, we may need to pay more attention to the stability of cultural dimensions especially in analysis where cultural dimensions are included as explanatory variables. Even if cultural dimensions are suggested based on sufficient theoretical discussion, the 'measured' dimensions can be different – we found that some cultural dimensions used in the existing work were unstable. The instability per se is not problematic, but it can be when unstable variables are used as independent (explanatory) variables. Finally, the repeated application of factor analytic technique can be problematic. By the basic rationale of the technique, 'condensing' the dimensions reflected in social survey items too much can lead to convergence on the most powerful factor for the entire social phenomena – usually economic dimensions. Our simple test also supported this (Section 3.6.2.5).

At the same time, however, we need to consider limitations in methods applied in this research. Most of all, any good justification cannot hide the fact that culture is a qualitative subject which is inherently historical. Although many cross-cultural surveys on cultural aspects encourage us to analyse these, quantitative data analysis is not sufficient at all, given that 'cultural differences cannot be understood without the study of history' (Hofstede, 2001: 12). There is still scepticism about measuring people's orientations through surveys (Reisinger, 1995: 332-342). If there can be an excuse, it would be the practicality of comparing more societies for more general patterns at the expense of details in depth within permitted space. In this, the present research leaves and leads to requests for further research on the cultural effects on social policy making by case-oriented qualitative designs which are 'by nature sensitive to complexity and historical specificity' (Ragin, 1987: ix).

Our analysis of people's values is not exhaustive. We attempt to extract only the relatively comparable cultural dimensions from a dataset containing much more information on people's values and culture. In addition, there are also many other dimensions 'related to equally fundamental problems of mankind' (Hofstede, 1980: 313-314) outside the dataset, that is, not explored by the survey. More critically, it should be remembered that there are more societies – countries not included in this analysis or not

participating in the EVS-WVS survey series. Although we select 22 wealthier countries to minimise the impact of differing levels of economic development on the analysis, systematically different patterns of relationship between culture and social policy can and probably do exist outside the advanced welfare capitalistic world.

The factor analysis technique has advantages of facilitating the multi-item index: it is more able to capture a multi-dimensional concept and interrelated facets; more reliable with averaging out random errors and pooling information in common; and valid with a more representative sample of information about underlying concepts (Alm & Torgler, 2006: 229-230). However, the most important aspect of this technique is that the decision about which variables to use is made arbitrarily. Although to avoid this arbitrariness we attempt to be guided statistically – by grouping items based on correlations, which can in turn lead to the risk of 'catchall' factor analysis – catch-all studies that are not theoretically guided can generate either factors hard to interpret or 'trivial' conclusions (Hofstede, 2001: 31-34). In Chapter 2 we suggested a new way of conceiving the cultural dimension – as societal values, which have rarely been studied unlike universal values and situational values. Whilst the universal values have been theoretically reasoned from the universal needs and situational values have been assumed from the relevant concrete issues (e.g. public opinion on a certain issue), it is not easy to reason examples of societal values conceptually – and we have no existing examples which can guide us (Section 3.6.1). Although many attempts have been conducted as sensitivity analyses at the various points in time, in order to obtain robust and not trivial results, the limitations of the exploratory feature of our analysis should be kept in mind.

Finally, of course, cultural pluralism is not an ideal position to adopt. However, Hofstede's concern about ethnocentrism (2001: 18-19) is reason enough to justify the cultural relativist perspective: ethnocentrism can be found in 'the instrument used for the collection of data', in 'the very idea of cross-cultural research', in 'the very concepts and categories' used in the analysis, and even in 'the dissemination of research results'. Now let us turn to the results of data analysis (Chapter 4, 5, 6 and 7).

CHAPTER FOUR:

ANALYSIS OF VALUES

4.1 Introduction

Data on people's values are analysed in this chapter to provide examples of societal values. The basic premise is that societal values will be more fruitful for exploring the cultural context of society and examining the effect of the cultural context on social policy than the basic human (universal) values and situational values (Chapter 2). As dimensions showing the cultural context, societal values are expected to be widely and deeply embedded in society, and as a result, to be stable over time. The fact that societal values have rarely been conceptualised and explored and that value dimensions are stable over time have not often been examined in previous studies leads us to an exploratory analysis to find examples of societal values (Chapter 3). This is the reason why the analysis of values is part and parcel in this research.

The methods applied and the process used to analyse the data on values drawn from all three waves of the EVS-WVS were introduced in the previous chapter (Section 3.5 and 3.6). We will present six examples of societal values which are comparable across time and space (at least within 22 OECD countries), which are cross-level equivalent (at least between the individual level and culture level) and which are stable over time (at least for two decades). Since the validity and reliability of these societal values are decisively crucial for further steps of this research, the process of analysis is described and discussed in rather a long and detailed manner in sections below. Although the analysis is exploratory, we try to draw on the existing studies and *a priori* theories, especially in interpreting the underlying dimensions (societal values) we extract.

4.2 Classification of Items

As discussed in the previous chapter (Section 3.5), 83 out of about 900 items of the EVS-WVS data have been selected, as they have been surveyed in most of our object countries in all three waves. Within these 83 items, two variables are problematic for factor analysis and were discarded: one was very nominal (which was about religious denomination) and inappropriate for factor analysis; another asked for respondents' second choice answers to the same question,[70] which would not appear to be crucial in this analysis providing the first choice is included. Instead, two variables asking respondents, "If you have to choose, which one of the things on this card would you say is most important? And which would be the next most important?" and giving a choice between four categories of maintaining order in the nation, giving people more say, fighting rising prices and protecting freedom of speech are transformed into four new variables[71] - now we have 83 items again.

These 83 items are, as discussed above (in Chapter 3), classified into groups based on the correlations between them. The original EVS-WVS questionnaire is sectioned into seven domains: perceptions of life; environment; work; family; politics and society; religion and morale; and national identity. This might have been a good guideline for grouping our 83 items. However, any manipulating activity may cause different results in quantitative data analysis. Given that there was already manipulation – i.e. the selection of 83 items - it is probable that the original sectional design will not work for eliciting dimensions as planned. We need to examine whether a particular set of items within only 83 items elicits a certain aspect of people's values 'as designed'.

Furthermore, a variable does not necessarily reflect only one specific dimension, as human activities (including answers to survey questions) are likely to reflect complex situations and considerations. If more than one aspect of respondents' thought and attitudes are reflected in a variable, this variable can constitute different sets of items

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[70] Respondents were asked about the geographical group to which they think themselves belong. Answer categories were locality, region, country, continent, and the world.

[71] Score 2 was given to the first choice and 1 to the second, and these were summed on the basis of score 1 for being not chosen in both questions. As a result, all the 4 new variables ranged from 1 to 4.

revealing different dimensions. For example, the item of 'how much confidence a respondent has in church' can show not only how much the respondent trusts institutions in general along with other confidence-related items, but also how much faith s/he has in church and religion along with other religion-related items. In this, categorisation based on correlations can also be an attempt to find out whether there is another way of categorisation which enables us to elicit certain dimensions more clearly.

Examining the correlation matrix of 83 items is not easy. The complex interrelations between variables make it almost impossible to arrive at a classification. Instead, factor analytic techniques, which are based on analysis of the correlation matrix, are expected to show which variables can be grouped together. Principal Component Analysis (PCA) was conducted with all 83 items to get some general ideas about grouping. The PCA in this case is not robust since some of the 83 variables are probably correlated very weakly or not at all, which means that these items are not 'factorable' together. However, at this stage, the robustness of extracted factors is not our main concern – PCA was not used to obtain factors and factor scores but merely to develop ideas for categorisation based on the correlations between variables. These were iterative processes, putting aside variables distinctively forming certain groups by their correlations and conducting PCA again with items left. As a result, 83 items were categorised into 10 groups (Table 4.2.1), which are partly in accordance with the original questionnaire sectional design: religion; two groups of morality; politics; confidence; work; tolerance; family; optimism; and autonomy.

However, some variables were assigned to different groups from domains in the original questionnaire design, and a few items formed a new cluster. For example, the variable of 'confidence in churches' was classified as a 'Religion' related item rather than a 'Confidence' related item (by higher correlations with other religion-related items). Three variables on life satisfaction, happiness and how much respondents were enjoying freedom of choice and control, unexpectedly, showed strong correlations between each other and constituted the group of 'Optimism'. Meanwhile, items for each of the two

groups of Morality were not correlated with each other even moderately, although most of these variables were placed in the same section of the original questionnaire.

Table 4.2.1 10 groups of 65 items available for three waves of EVS-WVS data

Category	Items	Answer scale
Religion	• Important child qualities: religious faith • Confidence: Churches • How important is God in your life • Get comfort and strength from religion • How often attend religious services • Religious person • Believe in: God ; Heaven; Life after death; Hell	0~1 (mentioned) 1~4 (none at all) 1~10 (very) 0~1 (yes) 1~8 (never) 0~1 (yes) 0~1 (yes)
Morality1	• Justifiable: Suicide; Homosexuality; Abortion; Divorce; Euthanasia • Woman as a single parent can be approved*	1~10 (always) 0~1 (yes)
Morality2	• Justifiable: Claiming untitled benefits; Avoiding a fare on public transport; Someone accepting a bribe; Cheating on taxes	1~10 (always)

Politics	• Political action: Signing a petition; Lawful demonstrations;
	   Joining unofficial strikes; Joining in boycotts;
	   Occupying buildings or factories
	• Interest in politics
	• Self positioning in political scale
	• How often discusses political matters with friends
		1~3 (would never)
		
		1~4 (very)
		1~10 (right)
		1~3 (never)

Confidence	• Confidence: The Civil Services; Parliament; The Press; Labour Unions; The Police; Armed Forces	1~4 (none at all)

Work	• Important in a job: Good pay; Not too much pressure;
	   Good job security; A respected job; Good hours;
	   An opportunity to use initiative; Generous holidays;
	   That you can achieve something; A responsible job;
	   A job that is interesting; A job that meets one's abilities
		0~1 (mentioned)

Tolerance	• Not like to have as neighbours: Heavy drinkers;
	   People with a criminal record; Immigrants/foreign workers;
	   People of a different race; Emotionally unstable people
		0~1 (mentioned)

Family	• One must always respect and love one's parents • Parents must always do best for their children • Child needs a home with father and mother • A woman has to have children to be fulfilled • Marriage is an out-dated institution • Future changes: More emphasis on family life • Woman as a single parent can be approved*	0~1 (agree) 0~1 (agree) 0~1 (agree) 0~1 (agree) 0~1 (agree) 0~3 (bad thing) 0~1 (yes)
Optimism	• Satisfaction with your life • Feeling of happiness • How much freedom of choice and control	1~10 (satisfied) 1~4 (not at all) 1~10 (a great deal)
Autonomy	• Important child qualities: Good manners; Independence; Imagination; Determination Perseverance; Obedience • Future change: Greater respect for authority	0~1 (mentioned) 1~3 (bad thing)

* placed in two categories.

Each of the 10 groups was analysed by PCA to extract underlying dimensions (values). Since PCA here is not just to generate general ideas for categorisation purpose but for actual analysis, to find latent dimensions, it was necessary to conduct various tests for robust results as discussed above (Section 3.6) including not only technical tests but also tests for comparability, cross-level equivalence and stability.

18 variables did not form any clusters, showing poor correlations with others. It can be argued that these 18 items may elicit unique dimensions which are stable over time. In fact, for example, the item asking respondents whether they think that most people can be trusted is very popularly used to measure the degree of interpersonal trust, especially by the school of social capital. If the portion of respondents who choose 'can be trusted' is calculated for each country, the differences between countries are quite stable over time. However, as discussed above (Section 3.6.1) the comparability across countries is questionable given that the measure is based on only one item. That is, in this example, we cannot test whether the notion of trusting and being trusted is the same across different cultures. With this in mind, these 18 items were discarded.

4.3 Analysis of the Group of Religion

4.3.1 The initial factor analysis with the pooled dataset

Religion has attracted much attention within welfare studies, so have items relevant to religion in attitudinal survey data. Various underlying dimensions have been found from these items, yet researchers see 'religiosity' as the core dimension correlated with all other religion-related dimensions (Hagenaars, Halman & Moors, 2003: 52). For example, Halman and his colleagues (Halman, Pettersson & Verweij, 1999) found quite strong (rank) correlations of religiosity with the other two religion-related dimensions between 15 countries.[72] In our analysis too, we find that there is one underlying factor of

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[72] They (Halman, Pettersson & Verweij, 1999) measured three dimensions based on the EVS data:
'Personal Religiosity': by questions about religious self-determination, subjective importance of one's belief in God, if one gets comfort and strength from religion or not, and frequency of moments of prayer.
'Orthodoxy': by eight items on belief in God, the soul, sin, life after death, heaven, the devil and hell.

distinctively stronger explanatory power for variance of all 10 items constituting the group of religion through PCA with the pooled dataset. All 10 items are heavily loaded on this factor (Table 4.3.1). Since those variables are related to religious activities, beliefs in religious dogma and religious attitudes, the factor in this analysis is also interpreted as '***Religiosity***', drawing on the existing studies.

Table 4.3.1 The results of factor analysis of 10 religion-related items with the pooled dataset and with datasets of each wave*

Input Variables	Factor Loadings			
		Wave		
	Pooled	1 (1981/1982)	2 (1990)	3 (1999/2000)
How important is God in your life (1 ~ 10 = very)	.887	.891	.897	.875
Get comfort and strength from religion	.820	.818	.833	.808
Believe in: Heaven	.778	.795	.794	.752
Confidence: Churches (1 ~ 4 = none)	-.752	-.780	-.761	-.724
Believe in: God	.767	.751	.783	.760
How often attend religious services (1 ~ 8 = never)	-.755	-.750	-.769	-.745
Believe in: Life after death	.682	.718	.688	.651
Religious person or not	.744	.707	.764	.753
Believe in: Hell	.645	.660	.633	.645
Important child qualities: Religious faith	.589	.537	.649	.576
Explained Variance	55.7	55.7	57.9	53.8

*By PCA; Not rotated since extracting only one factor was desirable in all analyses.

4.3.2 Comparability across time and place

Firstly, the sensitivity of this factor solution to time was examined by PCA of the same 10 items with datasets by each wave (Table 4.3.1). A slight change in the factor loadings over time was found but the factors extracted from datasets of different waves do not appear to indicate differing dimensions. It is possible there has been no serious alteration

'Church Adequacy': by questions of whether the churches are giving adequate answers or not to man's moral, family, and spiritual problems.

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of notions relevant to these 10 items over time and the underlying factor (religiosity) appears to be comparable across different time points. Nonetheless, three variables - the degree of confidence people have in church, whether they believe in Heaven and whether they believe in life after death - have presumably become less relevant to religiosity with decreasing factor loadings over time (i.e. in the case of confidence in churches, from 0.780 through 0.761 to 0.724 in terms of the absolute value).

Secondly, the sensitivity to place of this factor solution was examined by PCA of the same 10 items with datasets by each country. In some cases we could extract either one factor or two factors. Yet the first factor showed a clearly larger eigenvalue in all cases. However, there was a deviant case - the item of 'belief in hell' was loaded distinctively low (lower than 0.300) on the factor in the data of Iceland (Table 4.3.2, bolded). Communality of the item with the factor was also very low (about 0.06). In other words, the variance of this item could not really be explained by the factor. Our data suggested that believing in hell or not had nothing to do with Icelander's religiosity – the factor found in the Icelandic case and in other countries cases could not be compared (was not comparable across countries) because of the different notions of belief in hell. As a result, we discarded the item of belief in hell.

Table 4.3.2 The factor solution of 10 religion-related items in datasets of Iceland and Japan*

Input Variables	Factor Loadings	
	Iceland	Japan
How important is God in your life (1 ~ 10 = very)	.855	.758
Get comfort and strength from religion	.784	.729
Believe in: Heaven	.679	.726
Confidence: Churches (1 ~ 4 = none)	-.701	-.581
Believe in: God	.744	.737
How often attend religious services (1 ~ 8 = never)	-.506	-.431
Believe in: Life after death	.557	.693
Religious person or not	.765	.674
Believe in: Hell	*.252*	.672
Important child qualities: Religious faith	.430	.498
Explained Variance	42.5	43.3

*By PCA; Not rotated since extracting only one factor was desirable in both cases.

Japanese notions related to religion can be different from those in other object countries because Japan is the only society in which the most popular religion is Buddhism not Christianity. In fact, in the analysis of the Japanese case, either one or two factors could be extracted, which implies that there is probably difference in notions to a certain extent. However, the eigenvalue of the first factor was distinctively high and as was the case in other countries the factor loadings of all input variables on the first factor were heavy (as shown in the last column of Table 4.3.2). In addition, the factor solution with the pooled dataset was not sensitive to the alteration of including and excluding Japan. There was no need to exclude Japan in analysis of this group.

Table 4.3.3 Factor loadings of nine religion-related items on religiosity by PCA at both the individual level and the culture level

Input Variables	Factor Loadings on Religiosity	
	Individual level	Culture level (N=51)
How important is God in your life (1 ~ 10 = very)	.895	.972
Get comfort and strength from religion	.832	.955
Believe in: God	.781	.952
Religious person or not	.762	.748
Confidence: Churches (1 ~ 4 = none)	-.759	-.847
Believe in: Heaven	.757	.873
How often attend religious services (1 ~ 8 = never)	-.755	-.766
Believe in: Life after death	.677	.830
Important child qualities: Religious faith	.582	.883
Explained Variance	57.8	76.2

The same process was conducted again but this time with nine items. PCA of these 9 variables extracted one factor again – this could still be interpreted as religiosity. This factor solution was not sensitive to time and place. We could get the same factor solution from different datasets by wave, by country and by both. This underlying dimension, religiosity, appears to be comparable across at least 20 OECD countries (there is no data for Australia and Switzerland) and over two decades from 1981 to 2000. The results of PCA of these 9 items with the pooled dataset are presented in the second

column in Table 4.3.3. Factor scores for individual religiosity were produced with the pooled dataset and saved.

4.3.3 Cross-level equivalence

Can this underlying value – religiosity – extracted at the individual level properly reveal the cultural context of society if aggregated? According to the different logic of society as a collectivity, is religiosity not a value at the culture level? This was examined by PCA of the same nine items 'at the culture level.' The country means of these 9 items were calculated and saved – we could get 51 culture level cases from 20 countries by different waves, and factor analysed (in the last column of Table 4.3.3). One underlying dimension was extracted, which could also be interpreted as religiosity. Religiosity may be a value dimension applicable for both individual and country level equivalently. As discussed above (Section 3.6.4) this country level analysis is just for the purposes of verifying the results of our individual level analysis – there are too few cases for a robust result. We will use the (aggregated) factor scores drawn from the individual level analysis for the culture level religiosity.

4.3.4 Stability

The stability of religiosity as a cultural value was examined by analysing how well differences in religiosity between countries maintained over time, as discussed (Section 3.6.5). Correlations between levels of religiosity in different societies (by the country means) were examined for this and presented in Table 4.3.4.

Table 4.3.4 The rank correlation between the levels of religiosity of societies at different time points

	1990	1999/2000
1981/2	.912** (n=14)	*.846*** (n=13)
1990	1.00	.853** (n=17)

By Kendall's method (tau-b); ** significant at the 0.01 level.

The correlation coefficients are all statistically significant and very high. Considering the small number of cases, the statistical significant levels are rather impressive. In particular, the correlation coefficient between ranks at 1981/2 and at 1999/2000 (0.846, bolded in table) are far larger than our criterion of 0.700. There may have been serious changes in the social, economic and political situations of the different countries over the two decades, yet the religiosity of societies has not fluctuated much – religiosity appears to be a part of the cultural context of society, independent of the economic and political contexts (see Section 2.4). Thus we can see that religiosity is clearly one of the societal values.

4.4 Analysis of the Group of Morality 1

4.4.1 The initial factor analysis with the pooled dataset

In the EVS-WVS series respondents are asked whether various 'morally debatable' acts (Halpern, 2001: 240) can 'always be justified, never be justified or something in between', with 10-point rating scales. These items have been widely used for assessing moral values like 'Trustworthiness' (e.g. van Oorschot & Arts, 2005)[73] and the three dimensions of 'Legal-illegal, Personal-sexual and Self-interest' (e.g. Hagenaars, Halman & Moors, 2003; e.g. Halpern, 2001)[74] with different selections of items. In particular, these variables have been paid a great deal of attention within the school of social capital. Researchers of social capital see social norms as providing the motivational bases for social interaction (van Oorschot & Arts, 2005: 12) and 'evolving' over time through social interaction (Durkheim, 1961 and Mead, 1934 in Patulny, 2004: 3), in which

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[73] With four items of claiming benefits not entitled, cheating on tax, lying in own interest and accepting a bribe.

[74] The measurement by Hagenaars and his colleagues (Hagenaars, Halman & Moors, 2003) were of: Legal-illegal permissiveness by items of joyriding, throwing away litter, drink and driving and speeding over the limit; Personal sexual permissiveness by items of homosexuality, abortion, divorce, euthanasia, suicide and having casual sex; Self-interest permissiveness by items of claiming benefits not entitled, cheating on tax, lying in own interest and paying cash for services to avoid taxes. Halpern (2001) extracted an equivalent three dimensions and heavily loaded items on each dimension were divorce, abortion, homosexuality, prostitution, euthanasia and suicide for the personal-sexual dimension, drunken-driving, joyriding, littering, threatening strikers and assassinations for the legal-illegal dimension, and keeping money found, lying in own interest, cheating on tax and avoiding the fare on public transport for the self-interest dimension.

morality plays a crucial role (e.g. see Fukuyama, 1999; Putnam, 1995; 2001; van Oorschot & Arts, 2005; Woolcock & Narayan, 2000). For example, van Oorschot and his colleagues (van Oorschot, Arts & Gelissen, 2006: 150-154) see 'civic morality' or 'civic commitment' as central to social norms and attempt to measure this dimension through 'trustworthiness'.

Most items of the two morality groups in this analysis are also from these questions (Table 4.2.1). The process of categorising items showed that nine morality-related items and one variable about the perception of lone female parents could be grouped into two categories with very low correlations between items constituting different groups – this is supported by existing works, which found more than two dimensions from these items. We analysed the two groups separately.

Table 4.4.1 The results of factor analysis of six morality-related items with the pooled dataset and with datasets of each wave*

| Input Variables | Factor Loadings | | | |
| | | Wave | | |
	Pooled	1 (1981/1982)	2 (1990)	3 (1999/2000)
Justifiable: Divorce (1 = Never ~ 10 = Always)	.814	.806	.805	.815
Justifiable: Abortion (1 ~ 10 = Always)	.812	.801	.802	.824
Justifiable: Homosexuality (1 ~ 10 = Always)	.740	.729	.713	.751
Justifiable: Euthanasia (1 ~ 10 = Always)	.710	.681	.709	.710
Justifiable: Suicide (1 ~ 10 = Always)	.663	.686	.679	.631
Woman as a single parent can be approved (0 ~ 1 = Yes)	.462	.529	.439	.442
Explained Variance	50.4	50.6	49.2	50.1

*By PCA (Principal Component Analysis); Not rotated (only one factor extracted).

The first morality group consists of six items – to what degree divorce, abortion, homosexuality, euthanasia and suicide are justifiable, and whether single mothers are approved of - most of which overlap variables used for measurement of the 'personal-sexual' dimension in studies by Halpern (2001) and Hagenaars et al (2003). We also draw one underlying dimension from these six items by PCA with the pooled dataset, on

which all six variables were loaded heavily (Table 4.4.1). Yet, interpreting this dimension as personal-sexual morality is problematic. All six items are about controversial ethical issues which might not have been socially debatable in the past - especially when religions had a very powerful influence over the whole society. Acts described in these 6 items are all against the common teachings and dogmas of most religions and traditional societies, which formed people's social and moral ethics before the modern age. In this, a strong correlation between this dimension and religiosity (-0.507 at the 0.01 level between individual factor scores) is expectable.[75] We would argue that this dimension reveals the degree of adherence to '***Traditional Ethics or Traditional Ethical Values***'.

4.4.2 Comparability across time and place

The dimension of traditional ethical values appears not to be sensitive to time. PCA of six items with datasets of each wave do not seriously alter the factor solution (Table 4.4.1). If we look at this in more detail, a slight change in people's notions can be seen. Whilst four variables about abortion, divorce, euthanasia and homosexuality have become more explicable (increasing factor loadings over time) by the underlying factor (traditional ethical values), those about suicide and female lone parents are now less explicable (decreasing factor loadings over time). It appears that people have gradually differentiated suicide from divorce, abortion, euthanasia and homosexuality. Probably, tabooing divorce, abortion, homosexuality and euthanasia was a common social norm but has changed into a debatable issue, while tabooing suicide is still common. However, at this moment of our analysis, it still seems that one underlying dimension can explain the large portion of variances in all of these items.

Meanwhile, there is a gap between factor loadings of the variable about approval of female single parents (moderate) and of other items (heavy). Communality of the item with the factor has also decreased from 0.280 (wave 1) to below 0.200 (wave 2 and 3) –

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[75] This presented a negative coefficient since until this step higher factor scores of this dimension meant lower degree of adherence to such traditional-religious norms.

the factor cannot explain 20 percent of the variance of this item. This may imply that the issue of single mothers is less related to the ethical values than others like abortion, and that it becomes less and less so. This is more serious in PCA with datasets by each country and by each country at each wave. In some cases, the correlations of this item with other variables, communality with the factor and factor loading are very low.[76] It is suggested by our sensitivity analysis that whether a respondent approves of female single parents is relevant to the ethical values not in every culture. As a result, we need to drop this item from the analysis.

Table 4.4.2 Factor loadings of five morality-related items on traditional ethical values by PCA at both the individual level and the culture level

Input Variables	Factor Loadings on Traditional Ethical Values	
	Individual level	Culture level (N=52)
Justifiable: Divorce (1 = Never ~ 10 = Always)	.818	.913
Justifiable: Abortion (1 ~ 10 = Always)	.818	.900
Justifiable: Homosexuality (1 ~ 10 = Always)	.744	.838
Justifiable: Euthanasia (1 ~ 10 = Always)	.723	.896
Justifiable: Suicide (1 ~ 10 = Always)	.680	.825
Explained Variance	57.6	76.6

Five items are now analysed through the same process. One underlying factor is found which can still be interpreted as traditional ethical values. This factor solution is not sensitive to time, to place or to both. Traditional ethical values are comparable across 22 OECD countries. This result is presented in the second column of Table 4.4.2. Factor scores for the individual level of adherence to traditional ethical values were produced with the pooled dataset and saved after being multiplied by -1 to indicate stronger adherence with higher scores.

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[76] For example, the communality was 0.060 and factor loading was 0.246 in the data of Switzerland. In the sensitivity analysis by each country at each wave, for another example, communality was 0.019 and factor loading was 0.137 in the Japanese case at wave 2. Within the Sweden wave 3 data this item was not correlated at all with the item on euthanasia. Similar problems were presented in the datasets of Canada, Iceland and the US.

4.4.3 Cross-level equivalence

To examine the cross-level equivalence of this dimension of traditional ethical values PCA of the same five items was conducted at the culture level. The country means of these five items were calculated – 52 culture level cases from 22 countries – and factor analysed (shown in the last column of Table 4.4.2). One underlying dimension was extracted and could be interpreted as traditional ethical values. This dimension appears to be applicable for both individual and country level equivalently.

4.4.4 Stability

Inspection of correlations between levels of adherence to traditional ethical values (Table 4.4.3) implies that differing levels of this value would reveal an aspect of the cultural context of society. Correlation coefficients are all statistically significant and very high. The correlation coefficient between ranks at 1981/2 and at 1999/2000 is large enough (0.718, bolded in table). We can therefore include traditional ethical values in the list of societal values.

Table 4.4.3 The rank correlation between countries' levels of traditional ethical values at different points in time

	1990	1999/2000
1981/2	.744** (n=13)	*.718*** (n=13)
1990	1.00	.683** (n=16)

By Kendall's method (tau-b); ** significant at the 0.01 level.

4.5 Analysis of the Group of Morality 2

4.5.1 The initial factor analysis with the pooled dataset

There are four variables in the second morality group – to what degree (within a 10-point scale) avoiding the public transport fares, cheating on taxes, claiming benefits without entitlement and accepting bribes are justifiable. PCA of these 4 items with the

pooled dataset extracted one underlying dimension on which all four items were loaded heavily (Table 4.5.1). Interpretation of this dimension is not easy, however. Different combinations of three out of these four items were analysed to measure the 'trustworthiness' (van Oorschot & Arts, 2005) and 'self-interest' dimensions (Hagenaars, Halman & Moors, 2003; Halpern, 2001). The underlying factor we extracted here also seems to show how much respondents are '(legally) trustworthy'. However, if this is a societal value embedded deeply and stable over time, it may not only simply reflect whether a respondent is a law-abiding citizen, but also it may reflect a deeper aspect like, for example, how much respectable people see their laws. According to Gundelach (1994: 50-51) Anglo-Nordic societies and the Continental Europe have understood freedom differently, which has in turn led to different legal systems. The rights of the individual are regarded as decisive in the Anglo-Nordic societies, whilst laws given by the state serve the purpose of regulating the citizens in the Continental societies.

Table 4.5.1 The results of factor analysis of four morality-related items with the pooled dataset and with datasets of each wave*

Input Variables	Factor Loadings			
			Wave	
	Pooled	1 (1981/1982)	2 (1990)	3 (1999/2000)
Justifiable: Avoiding a fare on public transport (1 = Never ~ 10 = Always)	.750	.783	.750	.719
Justifiable: Cheating on taxes (1 ~ 10 = Always)	.739	.712	.746	.762
Justifiable: Claiming benefits not entitled (1 ~ 10 = Always)	.692	.732	.667	.694
Justifiable: Someone accepting a bribe (1 ~ 10 = Always)	.644	.621	.613	.704
Explained Variance	50.1	51.1	48.5	51.9

*By PCA (Principal Component Analysis); Not rotated (only one factor extracted).

From another point of view, it is argued that, unlike the Southern part of Europe, the leaders of state and the religious authority were mostly the same person in Northern Europe where people regarded offences against the state as a sin (Kirchgassner, 1999 in Alm & Torgler, 2006: 238-239). In this sense, aspects reflected in this dimension are more complex than legal trustworthiness – possibly including how much people respect

the authority of laws and the processes that led to the building of states and their legal systems. At the same time, it may also be controversial to interpret this factor as the 'self-interest' dimension. Given that material interests tend to be dependent upon situational conditions, it is questionable whether any material interest dimension can be stable over time. That is, if this dimension is showing as one of the societal values stable over time then it cannot be interpreted as an interest dimension. We interpret this factor as '***Legal Permissiveness***' in that it reveals people's standpoints towards their laws and regulations. It should be noted that the term of 'legal permissiveness' was borrowed from Hagenaars and his colleagues' work (2003) but with a slightly different meaning based on different variables.

4.5.2 Comparability across time and place

The factor solution of these 4 items was unaltered by changing datasets, not only by wave (Table 4.5.1) but also by country and by country and wave – in any case, one distinctive underlying factor presented, legal permissiveness. The dimension of legal permissiveness looks comparable across time and country, at least within 22 countries for about 20 years.

4.5.3 Cross-level equivalence

The examination by PCA of the cross-level equivalence of four items at the culture level shows that the dimension of legal permissiveness can also be extracted at the culture level and applied equivalently at both levels (Table 4.5.2).

Table 4.5.2 The result of factor analysis of 4 morality-related items at the culture level

Input Variables	Factor Loadings Culture level (N=48)
Justifiable: Avoiding a fare on public transport (1 = Never ~ 10 = Always)	.808
Justifiable: Cheating on taxes (1 ~ 10 = Always)	.775
Justifiable: Claiming benefits not entitled (1 ~ 10 = Always)	.792
Justifiable: Someone accepting a bribe (1 ~ 10 = Always)	.688
Explained Variance	58.9

4.5.4 Stability

The examination of correlations (Table 4.5.3) shows that differences in this dimension between countries are maintained quite well with rather high coefficients. The rank correlation between the first wave and the third wave is sufficiently strong and significant (0.722 at the 0.01 significant level, highlighted in the table). We therefore count legal permissiveness as one of the societal values.

Table 4.5.3 The rank correlation between countries' levels of legal permissiveness at different time points

	1990	1999/2000
1981/2	.758** (n=14)	***.722*** ** (n=9)
1990	1.00	.455* (n=12)

By Kendall's method (tau-b); ** significant at the 0.01 level; * significant at the 0.05 level.

4.6 Analysis of the Group of Politics

4.6.1 The initial factor analysis with the pooled dataset

This group consists of eight items (Table 4.2.1). Five out of these eight variables are about respondents' attitudes towards various forms of political actions by which Hagenaars and his colleagues (2003) gauge the dimension of 'Protest Proneness': whether a respondent has engaged, might do or would never engage in political action such as signing a petition, attending lawful demonstrations, joining in boycotts, joining unofficial strikes and occupying buildings/factories. Another three variables are self-measured political stance (10-point scale), how much interest a respondent has in politics (4-point scale) and how often a respondent discuss political issues with friends (3-point scale).

PCA of these eight variables with the pooled data set extracts two factors (Table 4.6.1). According to our data, when the second underlying factor can be interpreted as a

dimension reflecting the degree of individual interest in politics, interestingly, the action of signing a petition is found to be more related to this dimension than the first factor on which other items of political actions are heavily loaded. Signing a petition does not require a considered decision but is an activity of expressing political concern about a certain issue. The moderate factor loadings of items about lawful demonstrations and boycotts on the second factor, in spite of heavy loadings on the first factor, also imply this. Meanwhile, we cannot interpret the first factor as 'protest proneness' following the existing study (Hagenaars, Halman & Moors, 2003) – the item of political stance is also reflected in this research – and its confirmation as a societal value to interpret this dimension must be postponed.

Table 4.6.1 The results of factor analysis of eight politics-related items with the pooled dataset and with datasets of each wave*

Input Variables	Factor Loadings							
	Pooled		Wave					
			1 (1981/2)		2 (1990)		3 (99/00)	
	Factors		Factors		Factors		Factors	
	1	2	1	2	1	2	1	2
Joining unofficial strikes (1 ~ 3 = would never)	**.745**	.098	**.754**	.098	**.721**	.118	**.764**	.074
Occupying buildings or factories (1 ~ 3)	**.728**	.035	**.732**	.105	**.730**	.018	**.723**	.016
Attending lawful demonstrations (1 ~ 3)	**.676**	*.357*	**.649**	*.410*	**.685**	*.326*	**.674**	*.356*
Joining in boycotts (1 ~ 3)	**.609**	*.373*	**.617**	*.386*	**.656**	*.348*	**.551**	*.389*
Self positioning in political scale (1 ~ 10 = right)	**.542**	-.160	**.590**	-.109	**.543**	-.201	**.500**	-.160
Signing a petition (1 ~ 3)	*.422*	**.445**	*.369*	**.474**	*.436*	**.452**	*.421*	**.426**
Interest in politics (1 ~ 4 = very much)	-.021	**-.838**	.008	**-.812**	-.047	**-.844**	-.002	**-.845**
How often discuss political matters (1 ~ 3 = never)	.029	**.811**	.067	**.778**	.032	**.825**	.005	**.813**
Explained Variance after rotation (Varimax)	29.8	23.3	29.9	23.0	30.5	23.5	28.6	23.3

*By PCA (Principal Component Analysis); extracting two factors was desirable in all four analyses.

4.6.2 Comparability across time and place

These two dimensions appear to be comparable across differing time points (Table 4.6.1). The factor solutions in different waves are not seriously altered but the item of

political self-positioning became less loaded on the first factor. Possibly, being politically left or right has been less relative to willingness to participate in political actions, or in other words, political actions have gradually been de-ideologised – although whether political actions have been more and more inspired by the interest dimension and not linked to class interests and trade unions cannot be answered within our data. Meanwhile, the item of signing a petition has lost its loading on the second factor while increased its loading on the first factor. A conjectural account is that signing a petition was a simple activity similar to discussing political matters in the past, but has become a politically more serious matter. These changes of notions are revealed more clearly in analyses by each country and wave below.

Table 4.6.2 Differing factor loading structures of eight politics-related items across datasets of each country*

Input Variables	Factor Loadings							
	Type 1 e.g. Germany Factors		Type 2 e.g. UK Factors		Type 3			
					Greece Factors		Portugal Factors	
	1	2	1	2	1	2	1	2
Unofficial strikes	**.804**	-.021	**.715**	-.078	**.771**	.115	**.813**	.141
Occupying buildings/factories	**.798**	-.036	**.721**	-.012	**.772**	-.161	**.733**	.120
Political stance	**.405**	.040	**.511**	-.327	**.439**	.121	.265	-.045
Lawful demonstrations	**.538**	.529	**.704**	.341	**.692**	.241	*.464*	**.481**
Boycotts	**.648**	.308	**.681**	.342	.205	.020	**.704**	.296
Petitions	.323	**.575**	.387	.212	**.583**	.291	.355	**.576**
Interest in politics	-.022	**-.816**	-.055	**-.828**	-.141	**-.837**	-.023	**-.841**
How often discuss politics	-.072	**.791**	.088	**.773**	.085	**.871**	-.028	**.846**
Explained Variance	28.3	25.0	30.1	20.9	28.4	20.7	28.6	23.3

* By PCA (Principal Component Analysis) with varimax rotation.

PCA of eight variables with each dataset of 20 countries - Australia and Switzerland have no data for this analysis - shows that the factor solution varies across countries (Table 4.6.2). Two factors extracted with the pooled dataset above can be found only in 7 countries: Austria, Belgium, Canada, Germany, Italy, Japan and the US (type 1 in

Table 4.6.2). In more societies (11 countries), only two items (interests in politics and frequency of discussion about political issues) are loaded heavily on the second factor (type 2 in Table 4.6.2). Our data analysis suggests that, for example, signing a petition is a more significant political action for a Briton than for a German, and that how much interest one has in politics is relevant to political stance in Britain but not Germany. Even more troubling is the evidence that notions about certain items appear to be exclusively different in Greece and Portugal (type 3 in Table 4.6.2). According to our data, the boycott appears to have a distinctive meaning in Greek society, as does 'self-measured political stance' in Portuguese society.

Whilst PCA with datasets by each country shows that certain notions vary across country, analyses with datasets by each country at each wave reveal that certain notions have changed over time. As we can see from the Belgian example (Table 4.6.3) factor loadings of items about boycotts, lawful demonstrations and petitions on the second factor (say, the dimension of interest in politics) have decreased over time whilst loadings on the first factor (say, the dimension of willingness to participate in political protests) have increased in Canada, Austria, Finland, Denmark, France, Iceland, Ireland, Netherlands, Sweden, Norway and Luxembourg. In other words, according to our data, people's understanding of these political actions has changed: possibly, from actions to express their political interests to serious actions of political protest.

Table 4.6.3 The Belgian example of changing factor solutions of 8 politics-related items over time*

Input Variables	1981/1982		1990		1999/2000	
	1	2	1	2	1	2
Unofficial strikes	**.796**	.201	**.796**	.148	**.781**	.059
Occupying buildings or factories	**.814**	.229	**.773**	.203	**.778**	.114
Self positioning in political scale	**.507**	-.102	**.621**	-.292	**.502**	-.155
Joining in boycotts	**.539**	.493	**.678**	.389	**.615**	.352
Lawful demonstrations	.499	**.607**	**.670**	.413	**.627**	.406
Signing a petition	.269	**.693**	.384	**.524**	**.424**	.368
Interest in politics	.071	**-.791**	-.123	**-.815**	-.080	**-.855**
How often discuss political matters	.053	**.719**	.035	**.801**	.025	**.842**

* By PCA (Principal Component Analysis) with Varimax rotation.

Furthermore, this was not common across all object countries. In Spain, UK, Italy and Japan, a reverse pattern presented - rallies (a rising up) of factor loadings of these three variables on the second factor. In the US, the rallies came in the 1980s (so, between the results of 1981/2 and of 1990) but disappeared in the 1990s. Instead, the item of political stance raised its factor loading on the second factor (interest in politics) in the 1990s as did it within the Irish data in the 1980s. The correlations of the item of political stance with other variables fluctuate rather wildly and, sometimes these are too low (lower than factorable size) within the German data for the 1999/2000, the Portuguese data for 1990 and the 1999/2000 and the Austrian data for 1990. As a result, even for the same country, two underlying factors at different time points have different meanings – not comparable across time.

On the whole, our sensitivity analysis to examine comparability suggested that four out of eight items should be discarded – the item of political stance, and three items of political actions (boycotts, lawful demos and petitions). People's notions for these items are not the same in different cultures and also changing over time.

Table 4.6.4 Factor loadings of 4 politics-related items on political apathy and political negativism by PCA at both the individual level and the culture level

Input Variables	Factor Loadings on Political Apathy and Political Negativism			
	Individual level		Culture level (N=50)	
	Political Apathy	Political Negativism	Political Apathy	Political Negativism
Interest in politics (1 ~ 4=very much)	**-.877**	-.072	**-.876**	.297
How often discuss political matters (1 ~ 3=never)	**.874**	.089	**.915**	-.014
Joining unofficial strikes (1 ~ 3=would never)	.055	**.862**	.545	**.628**
Occupying buildings or factories (1 ~ 3=would never)	.103	**.853**	-.079	**.885**
Explained Variance (after varimax rotation)	38.6	37.1	47.1	32.2

* By PCA (Principal Component Analysis) with Varimax rotation.

PCA of 4 items clearly extracted two underlying factors (Table 4.6.4) – two variables were heavily loaded on each underlying dimension. This factor solution was not altered by changing dataset according to waves, countries and both. The first factor is

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interpreted as '**Political Apathy**' according to two heavily loaded items – a higher score for this dimension implies less interest in politics and less frequent discussion about political matters. The second factor is interpreted as '**Political Negativism**' – negative or passive to participation in political actions.

4.6.3 Cross-level equivalence

PCA of these four politics-related items with the pooled dataset at the culture level extracted two underlying dimensions equivalent to those found at the individual level analysis – political apathy and political negativism (Table 4.6.4).

4.6.4 Stability

Unfortunately, our examination of stability by the rank correlation found that both political apathy and political negativism could not be examples of societal values stable over time (Table 4.6.5). Differences in both dimensions between countries at 1999/2000 cannot be easily predicted (less than 30 percent – by squared correlation coefficients) by differences at 1981/1982. This is relatively low if compared with examples we found above (religiosity, traditional ethical values and legal permissiveness). The ranks at 1981 by levels of these three societal values could explain over 50 percent of variance in ranks at 2000. We cannot find any societal value from the group of politics.

Table 4.6.5 The rank correlations between countries' levels of political apathy and political negativism at different points in time

		1990	1999/2000
Political Apathy	1981/2	.714** (n=14)	*.515** (n=12)
	1990	1.00	.683** (n=16)
Political Negativism	1981/2	.121 (n=14)	*.455** (n=12)
	1990	1.00	.500** (n=16)

By Kendall's method (tau-b); ** significant at the 0.01 level; * significant at the 0.05 level.

Politics related items in social surveys appear to be dependent upon situations. Or, it is assumed that values on political issues may be strongly influenced by 'political' conditions such as who (which party) is in power and which political issues and policies are widely debated at that moment and so on.

4.7 Analysis of the Group of Confidence

4.7.1 The initial factor analysis with the pooled dataset

There are six variables in this group about how much confidence a respondent has (on a 4-point scale) in parliament, the civil service, the police, the labour unions, the press and the armed forces. In the original EVS-WVS questionnaire a far longer list of various institutions is included and has facilitated researchers' attempts to measure the level of people's trust in institutions – one of the key concepts in the school of social capital.[77] For example, van Oorschot and Arts (2005) measure 'trust in Welfare State Institutions' with six items: the police, the social security system, the health care system, parliament, the civil service and the justice system. Hagenaars et al (Hagenaars, Halman & Moors, 2003) tap 'confidence in authority institutions' with two items of 'church' and 'armed forces'. In our analysis, as we saw, the item about confidence in churches formed another group (religion) with religion-related variables. PCA of six items with the pooled dataset extracts one underlying dimension (table 4.7.1).

4.7.2 Comparability across time and place

This factor loading structure was not seriously altered in analyses of each wave's dataset (Table 4.7.1). Yet, it appears that people have differentiated the armed forces more and more from other state and social institutions, whilst notions about the labour unions have

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[77] In an extraordinarily brief manner, the concept of social capital departs from the idea that networks and norms of reciprocity have a certain value like improving the efficiency of society by facilitating coordinated actions. Trust, norms and networks have been regarded as crucial parts or categories of social capital, which form the 'social fabric'. Among these three key concepts, trust is often divided into generalised/interpersonal trust and trust in institutions and measured separately (e.g. see Fukuyama, 1999; Patulny, 2004; Putnam, 1995; 2001; van Oorschot & Arts, 2005; van Oorschot, Arts & Gelissen, 2006; Walters, 2002; Woolcock & Narayan, 2000).

become more similar to those about state organisations. Possibly, this change over time reflects the fact that the everyday lives of the general public have been farther removed from the armed forces since the World War and the Cold War than they have from other institutions. Meanwhile, it seems that the labour union could well have come to be understood by the public as one of the pre-installed social institutions.

Table 4.7.1 The results of factor analysis of six confidence-related items with the pooled dataset and with datasets of each wave*

| Input Variables | Factor Loadings | | | |
| | | Wave | | |
	Pooled	1 (1981/1982)	2 (1990)	3 (1999/2000)
Confidence: Parliament (1 = A great deal ~ 4 = None at all)	.756	.761	.756	.752
Confidence: The Civil Services	.754	.769	.750	.745
Confidence: The Police	.699	.701	.697	.699
Confidence: The Labour Unions	.558	.506	.550	.612
Confidence: The Press	.537	.573	.499	.543
Confidence: Armed Forces	.524	.602	.514	.463
Explained Variance	41.7	43.5	40.6	41.5

*By PCA (Principal Component Analysis); Not rotated (only one factor extracted).

The sensitivity analysis by each country's dataset reveals that the item of the armed forces showed very low correlation coefficients with items relating to the labour unions in many countries, with the extreme example of Australia where there were no correlations at all. This item was also very poorly correlated with the item of the press in some countries. This issue was seen in an enlarged picture by analysing datasets of each country by each wave.

PCA with datasets of each country at each wave confirmed firstly that the most heavily loaded items in this dimension were those of parliament, the civil services and the police. These three items invariably showed higher communalities and factor loadings. In this, the dimension appears to be relevant to people's confidence in the public institutions

which function as state agencies. Secondly, although the armed forces may also be one of the state agencies, our data suggest that people in many societies have differentiated the military more and more from other state institutions. Communality of this item with the underlying factor has been lowered over time in the Austrian, Belgian, German, Icelandic, Irish, Dutch, Norwegian, Portuguese, and British cases. For example, the underlying dimension could not explain almost any variance of the variable about confidence in the armed forces within the dataset of Iceland for 1999/2000. It was therefore necessary to drop this item.

In the meantime, correlations with other items, communalities and factor loadings of variables to do with the press and labour unions fluctuated rather wildly across datasets of each country by each wave. For example, the proportions of variances in these items which can be explained by the underlying factor ranges from under 10 percent to over 45 percent by datasets. Since the interpretation of the underlying dimension depends on the variables loaded in it, we cannot regard the factor solutions of each dataset as identifiable – the extracted dimension may not be the same. This reasoning led to the additional discarding of these two items. Finally, PCA of only three variables extracted one underlying factor which was not sensitive at all to time, society or both (Table 4.7.2). It was interpreted as '***Confidence in the State Institutions***', and factor scores were multiplied by -1 to show stronger confidence with higher value.

Table 4.7.2 Factor loadings of three items on confidence in the state institutions by PCA at both the individual level and the culture level

Input Variables	Factor Loadings on Confidence in the State Institutions	
	Individual level	Culture level (N=52)
Confidence: Parliament (1 = A great deal ~ 4 = None at all)	.825	.828
Confidence: The Civil Services	.822	.920
Confidence: The Police	.735	.862
Explained Variance	63.2	75.9

4.7.3 Cross-level equivalence

PCA of three items with cases of the country means (52 cases) extracted the equivalent one underlying dimension (Table 4.7.2).

4.7.4 Stability

Inspection of correlation at the country level (Table 4.7.3) showed a disappointing result in that differences in the level of confidence in the state institutions between societies were stable over time only to 'a certain degree'. According to the correlation coefficients, it appears that the levels of confidence in the state institutions were more diversified in the 1990s. Until 1990, the difference between countries was quite stable (shown by the rank correlation of 0.802 in the table).

Table 4.7.3 The rank correlation between countries' levels of confidence in the state institutions at different time points

	1990	1999/2000
1981/2	.802** (n=14)	*.564** (n=13)
1990	1.00	.544** (n=17)

By Kendall's method (tau-b); ** significant at the 0.01 level.

Conjecturably, some governments might have been more successful in restoring people's confidence in the 1990s since the level of confidence was decreased in the 1980s in most object societies within our data. Regardless of the possible excuses, however, it is clear that confidence in the state institutions is rather more vulnerable to external factors than the other underlying values we have found so far. We cannot therefore draw any societal value from the group of confidence.

4.8 Analysis of the Group of Work

4.8.1 The initial factor analysis with the pooled dataset

Hagenaars, Halman and Moors (2003) in their attempt to draw a European values' map based on all three waves of the EVS data, factor analyse items about the aspects

respondents think important in their jobs and find two underlying dimensions: expressive work quality and the instrumental work quality. This group of work in our analysis consists of 11 variables overlapping items used in their work and also extracts two underlying factors through PCA with the pooled dataset (Table 4.8.1).

Table 4.8.1 The results of factor analysis of 11 work-related items with the pooled dataset and with datasets of each wave*

	Factor Loadings							
			Wave					
Input Variables	Pooled		1 (1981/2)		2 (1990)		3 (99/00)	
	Factors		Factors		Factors		Factors	
	1	2	1	2	1	2	1	2
Important in a job: an opportunity to use initiative	**.741**	.078	**.732**	.082	**.747**	.078	**.741**	.062
Important in a job: that you can achieve something	**.694**	.065	**.705**	.051	**.685**	.052	**.688**	.078
Important in a job: a responsible job	**.655**	.155	**.644**	.189	**.652**	.137	**.661**	.139
Important in a job: a job that is interesting	**.613**	.158	**.631**	.166	**.615**	.143	**.590**	.151
Important in a job: a job that meets one's ability	**.578**	.224	**.571**	.237	**.559**	.221	**.597**	.218
Important in a job: a respected job	**.458**	*.358*	**.463**	*.356*	**.452**	*.371*	**.456**	*.338*
Important in a job: good hours	.119	**.732**	.136	**.723**	.101	**.742**	.128	**.721**
Important in a job: generous holidays	.148	**.718**	.146	**.717**	.135	**.722**	.167	**.711**
Important in a job: not too much pressure	.168	**.632**	.161	**.611**	.152	**.642**	.203	**.630**
Important in a job: good pay	.075	**.556**	.065	**.585**	.075	**.529**	.051	**.564**
Important in a job: good job security	.180	**.519**	.247	**.476**	.164	**.520**	.145	**.545**
Explained Variance after rotation (Varimax)	22.6	20.6	22.9	20.3	22.1	20.6	22.6	20.5

*By PCA (Principal Component Analysis); extracting two factors was desirable in all four analyses.

Items heavily loaded on the first factor, possibly in this analysis again showing '***the expressive (self-fulfilling) work quality***' dimension, are six variables about opportunity to use initiative, a job in which the respondent can achieve something, a responsible job, a job that is interesting, a job that matches one's ability and a respected job. On the

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second factor, which can be reasonably interpreted as '***the instrumental work quality***' dimension, five variables are loaded heavily: reasonable hours, generous holidays, not too much pressure, good pay and good job security.

4.8.2 Comparability across time and place

This factor solution of two dimensions appears not to be sensitive to time. Analyses with datasets by each wave lead to very similar results (Table 4.8.1). Interestingly, the factor loading of the item of 'job security' on the instrumental work quality dimension has increased for two decades – from 0.475 through 0.520 to 0.545, possibly reflecting rising concern about the greater flexibility of the labour market. Within items heavily loaded on the expressive work quality dimension, the variable of 'responsible job' has enhanced its relevance to the dimension, whilst the item of 'interesting job' has lost its factor loadings in the dimension (from 0.631 to 0.590). Meanwhile, it appears that people want respected jobs not only for 'expressive' purposes but also for their 'instrumental' value. The item about 'respected job' shows good factor loadings on both dimensions.

However, very different scenes are revealed in analyses of datasets by each country – how people perceive each item appears to vary across societies. According to our data, having a respected job is more 'instrumental' than 'expressive (self-fulfilling)' in Denmark, Luxembourg, Norway and Sweden, whilst good pay is more self-fulfilling than instrumental for Icelanders. It is also suggested that a job without too much pressure is valued not only for its 'instrumental' but moreover for its 'expressive' aspects in Portugal and Spain, as is a generous holiday in Spain; that job security is more important to self-development for the Greek and that a job fitted to one's ability is believed to be more relevant to instrumental work quality for the Japanese. Examples of these differing notions are presented in Table 4.8.2. As a result, 6 items (and relevant notions) are problematic for comparability across countries.

Table 4.8.2 Examples of different factor solutions of 11 work-related items across countries*

Input Variables	Factor Loadings									
	Denmark		Iceland		Greece		Japan		Portugal	
	Factors		Factors		Factors		Factors		Factors	
	1	2	1	2	1	2	1	2	1	2
An opportunity to use initiative	.680	.046	.740	.109	.733	.115	.750	.102	.712	.128
That you can achieve something	.658	.123	.668	-.020	.659	.100	.760	.156	.709	.041
A responsible job	.678	.107	.566	.289	.750	.040	.698	.083	.645	.198
A job that is interesting	.661	.142	.655	.156	.565	.318	.510	.377	.499	.452
A job that meets one's ability	.350	.349	.600	.141	.580	.227	.214	.493	.721	.100
A respected job	.303	.382	.453	.409	.513	.268	.558	.138	.560	.271
Good hours	.039	.708	.119	.691	.165	.794	.026	.755	.264	.711
Generous holidays	.145	.691	.127	.658	.076	.753	.110	.745	.414	.655
Not too much pressure	-.074	.656	.034	.727	.252	.671	.131	.600	.556	.392
Good pay	.253	.384	.361	.278	.144	.414	.152	.577	-.143	.744
Good job security	.193	.484	.359	.528	.504	.346	.166	.616	.380	.411
Explained Variance after rotation (Varimax)	19.4	19.2	23.6	19.1	25.7	19.9	21.1	24.0	29.3	19.6

*By PCA (Principal Component Analysis) with varimax rotation.

Analyses of datasets by each country at each wave show people's notions of various job features are different not only across societies but also across time. The dimension on which the item of a respected job is heavily loaded varied over time, even within societies. Our data analysis suggests that Canadians and the Portuguese increasingly value an interesting job, not just for self-development but for instrumental purpose as do the Danes and Swedes who prefer jobs that meet their abilities. In addition, in analysis of data of a certain society at a certain time, variables to do with a job suited to ability, good job security, a responsible job, a good pay, good hours, generous holidays and not too much pressure are all heavily loaded on a different dimension from that on which they were heavily loaded in PCA with the pooled dataset.

On the whole, it is not clear whether people of different countries and of different times answered to nine out of 11 items in this group with the same understandings based on the same notions. Work related values appear to be vulnerable to situational factors – possibly, the attributes people place more emphasis in their working lives are strongly dependent upon socio-economic conditions like income levels and working status, as well as wider contexts like the unemployment rate, individual compositional factors like educational level and even 'gender' (Hitlin & Piliavin, 2004).

All nine items were deselected and only two items were left: 'an opportunity to use initiative' and 'a job that you can achieve something'. Since factor analysis of only two variables is not desirable,[78] we attempted to construct an index of 'Self Development Work Quality' based on a simple calculation. Respondents who selected both 'an opportunity to use initiative' and 'a job that you can achieve something' as important work attributes were given a score of 3, those that selected one of either were given 2, and those which selected neither were given 1. The country mean scores of this index showed that the self-development work quality has been increasingly signified by people in more countries over time, supporting Halman (1996: 203) who contends that personal development is becoming an even more important work attribute.

Table 4.8.3 The rank correlation between countries' levels of self-development work qualities at different points in time

	1990	1999/2000
1981/2	.626** (n=14)	*.385* (n=13)
1990	1.00	.324 (n=17)

By Kendall's method (tau-b); ** significant at the 0.01 level.

However, as expected, country level values of this index were found to have wildly fluctuated for two decades in examination of the rank correlation (Table 4.8.3). Therefore, we could not find any societal value from the group of work.

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[78] Since items of social surveys mostly correlate with each other to some degree, factor analysis of two variables would extract a certain factor – this may not be the 'underlying' dimension which can explain the common aspect of various items but merely a correlation between two items. If not theoretically guided, factor analysis of two items may lead to an example of 'garbage in, garbage out'!

4.9 Analysis of the Group of Tolerance

4.9.1 The initial factor analysis with the pooled dataset

This group of tolerance consists of five items selected according to data availability (Section 4.2 and Table 4.2.1) from a long list of deviant or uncommon types of people about whom the respondent is asked whether they would like to have them as neighbours: heavy drinkers, emotionally unstable people, people with a criminal record, immigrants/foreign workers and people of a different race. These questions including five items in this analysis have been popularly used to measure 'Tolerance'.

Table 4.9.1 The results of factor analysis of 5 tolerance-related items with the pooled dataset and with datasets of each wave*

Input Variables	Factor Loadings							
	Pooled		Wave					
			1 (1981/2)		2 (1990)		3 (99/00)	
	Factors		Factors		Factors		Factors	
	1	2	1	2	1	2	1	2
No neighbour: Heavy drinkers (0 / 1 = commented)	**.737**	.003	**.733**	.002	**.748**	-.011	**.731**	.019
No neighbour: The emotionally unstable	**.700**	.127	**.703**	.078	**.696**	.149	**.699**	.136
No neighbour: People with a criminal record	**.687**	.173	**.678**	.192	**.680**	.200	**.700**	.133
No neighbour: Immigrants/foreign workers	.108	**.857**	.059	**.830**	.120	**.857**	.123	**.875**
No neighbour: People of a different race	.123	**.855**	.136	**.816**	.131	**.855**	.108	**.879**
Explained Variance after rotation (Varimax)	30.7	30.3	30.3	27.9	30.8	30.5	30.8	31.5

*By PCA (Principal Component Analysis).

For example, tolerance is one of the main concepts in the study of social capital and regarded as being closely related to interpersonal trust. According to Uslaner (1999: 137-138) people are more likely to 'accommodate other's preferences' that is, to 'tolerate' others different from themselves, if they trust each other. It is argued that tolerance is critical in 'democratic attitudes' or 'civic culture' which is essential for 'democratising' democracy (Giddens, 2002: 72-78). Inglehart (Inglehart & Welzel, 2003:

65) assesses 'Tolerance of Diversity' with a selection from these items as one of the main components of the 'Survival/Self-expression Values Dimension' which differentiates modern from post-modern societies. The initial PCA of these five items with the pooled dataset in this analysis reveals, however, not only one dimension of '*Tolerance*' as expected, but also another dimension seemingly related to a '*Discriminative Sentiment*' for different ethnicities (Table 4.9.1).

4.9.2 Comparability across time and place

This result appears to be stable over time at the first glance – not altered by changing datasets by waves (Table 4.9.1). However, a closer look at analyses of data by country shows that people's notions related to five items are not the same across societies. Results of PCA with datasets by each country can be clustered into three types, which are figured with three typical examples of scree plots (Figure 4.9.1). Australia, Canada, Greece, Iceland, Italy, Portugal, Great Britain and the United States belong to type 1, while Denmark, Finland, France, Ireland, Japan, Luxembourg, Netherlands, Spain, Sweden and Switzerland are seen as type 2 countries. Four countries - Austria, Belgium, Germany and Norway – show similar plots to the figure for type 3.

The scree plot of type 1 shows that it is desirable to extract two factors (for the scree-plot test and decision of how many factors to extract, see Section 3.6.2.1). The explanatory power (eigenvalue) of the first and second factor is distinctively higher than that of other factors. Items loaded heavily on the first factor are those of heavy drinkers, emotionally unstable people and people with a criminal record, while on the second factor are variables about different races and immigrants/foreign workers. In type 1 countries, correlations between items loaded more on the first factor and those loaded more on the second factor are very low and lower than those in other types' countries. This implies that people in these 8 societies may differentiate people of different ethnicities from people of different attitudes 'more seriously' than their counterparts in other types' societies. In this, it appears to be reasonable to interpret the second factor as 'Discriminative Sentiment'.

Figure 4.9.1 3 types of scree plots in PCA of 5 tolerance-related items for each of 22 countries
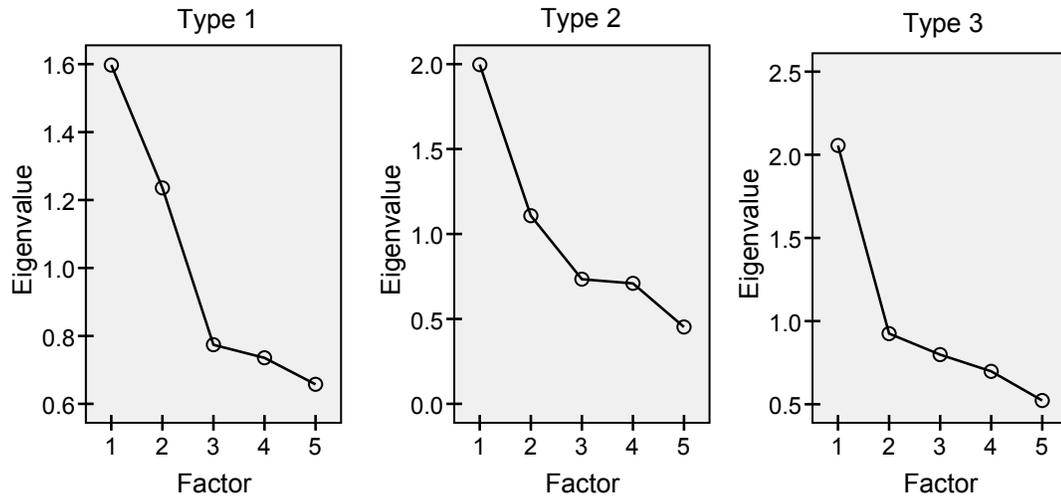
Conversely, people in societies of type 3 appear to see both people of different attitudes and people of different ethnicities similarly. Only the first factor shows exclusively higher explanatory power. Within datasets for these four societies, extracting only one factor – tolerance - is desirable.[79] Meanwhile, it is difficult to decide whether we need to extract only one factor or two factors in type 2 societies (10 out of 22 countries). The first factor shows 'exclusively' higher eigenvalue, yet the second factor, of eigenvalue bigger than 1, also reveals quite a different slope from that between the third and fourth factor. If two factors are extracted, items heavily loaded on each dimension are the same with those found in analysis of type 1 countries. People of these 10 societies appear to neither strongly differentiate people of unfamiliar attitudes from people of different ethnicities nor see them in a very similar way.

Given this, the two dimensions of Tolerance and Discriminative Sentiment drawn from the pooled dataset cannot be confirmed as being based on the same notions across countries. Instead, it is possible to obtain a comparable underlying dimension, if only

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[79] In these four countries, if we extracted two factors, these were not the same as two factors in type 1 countries. For example, the item of heavy drinkers was loaded heavily on the second factor while the other four items loaded more on the first factor in Austrian cases – these could not be interpreted as tolerance and discriminative sentiment.

one factor is extracted. Even in type 1 countries, all of the five items were loaded, at least, moderately (over 0.300) on the first factor – tolerance.

This possibility was inspected with analysis of data by each country of each wave. The result was generally good for most cases, yet two items of immigrants and different races were problematic in some cases – within the data of the US for the third wave, two items of different ethnicities correlated negatively with other three variables (which implies that respondents who dislike immigrants as their neighbours might prefer people with a criminal record as their neighbours). Also in the third wave data for Canada and the second wave data for Germany, correlations of these two items with others were poor (technically, too low to be factored). From factor loadings we could generally see that answers toward two questions about different race and immigrants/foreign workers fluctuated over time rather wildly even within a society. Probably, people's thoughts about those of different ethnicities are affected by external impacts. For example, temporary job scarcity can lead native people to see immigrants as unwanted competitors.

Finally, an attempt was made to find an underlying dimension by PCA with only three variables (Table 4.9.2). As expected, only one factor could be obtained, which was not sensitive to time, country or both – and interpreted as tolerance.

Table 4.9.2 Factor loadings of 3 items on tolerance at both the individual level and the culture level

Input Variables	Factor Loadings on Tolerance	
	Individual level	Culture level (N=52)
No neighbour: People with a criminal record	.723	.851
No neighbour: The emotionally unstable	.719	.961
No neighbour: Heavy drinkers	.705	.514
Explained Variance	51.2	63.7

4.9.3 Cross-level equivalence

Factor analysis of these three variables at the culture level (with the country mean values for each item) extracted the same one underlying dimension which appeared to be the same factor found in the individual level analysis – tolerance (Table 4.9.2).

Table 4.9.3 The rank correlation between countries' levels of tolerance at different time points

	1990	1999/2000
1981/2	.780** (n=14)	*.788*** (n=12)
1990	1.00	.617** (n=16)

By Kendall's method (tau-b); ** Significant at the 0.01 level.

4.9.4 Stability

The inspection of the rank correlation shows that differences in the level of tolerance between countries have been rather strongly maintained for two decades (Table 4.9.3). We can therefore add tolerance to our list of societal values and save factor scores after multiplying these with -1.

4.10 Analysis of the Group of Family

4.10.1 The initial factor analysis with the pooled dataset

The seven items forming the group of family showed relatively less strong (but factorable enough) correlations with each other, which led to this group's late emergence in the initial process of grouping, despite the fact family is one of the most significant concepts, subjects and institutions within human lives and the social sciences. Probably, this implies that family itself is a multifaceted concept manifest in various aspects of life. PCA of these 7 items with the pooled dataset found only one underlying dimension (Table 4.10.1).

Table 4.10.1 The results of factor analysis of seven family-related items with the pooled dataset and with datasets of each wave*

Input Variables	Factor Loadings			
		Wave		
	Pooled	1 (1981/2)	2 (1990)	3 (99/00)
Child needs a home with father and mother	.584	.580	.574	.602
One must always love and respect parents	.562	.582	.577	.524
Woman as a single parent can be approved	-.522	-.487	-.507	-.570
A woman has to have children to be fulfilled	.482	.407	.493	.526
Parents must always do best for their children	.475	.541	.500	.401
Future changes: More emphasis on family life (1 ~ 3 = bad things)	-.432	-.468	-.417	-.413
Marriage is an out-dated institution	-.389	-.385	-.379	-.397
Explained Variance	24.7	24.8	24.7	24.7

*By PCA (Principal Component Analysis); extracting only one factor is desirable in all analyses.

4.10.2 Comparability across time and place

In sensitivity analysis with each country's dataset, it is found that extracting two factors is desirable for some countries – some variables are not loaded even moderately on the first factor. The variance of two items in particular, whether marriage is an out-dated institution and whether future change to more emphasis on family life is good, is not explained well in several countries' datasets. This problem is enlarged when data of each country by each wave is analysed. These two items are not correlated at all or very poorly correlated with all other variables in the Canadian, Danish, Icelanders and Japanese cases in some waves. We thus need to discard these two items.

Factor analysis of only five variables also revealed a similar problem. In some countries at a particular moment, the item of approving female single parents is not correlated at all with all other variables (e.g. Japanese data for wave 2). There necessitated a further drop of an item. The final PCA of four items was conducted and the result found not to be sensitive to changing datasets by wave, country and both (shown in the column of 'individual level' in Table 4.10.2).

Table 4.10.2 Factor loadings of four items on traditional family values at both the individual and the culture level

Input Variables	Factor Loadings on Traditional Family Values			
		Culture level (N=50)		
	Individual level	Extract one factor	Extract two factors	
			Factor 1	Factor 2
Child needs a home with father and mother	.627	.840	**.836**	.122
One must always love and respect parents	.640	.655	.468	**.786**
A woman has to have children to be fulfilled	.602	.788	**.853**	-.138
Parents must always do best for their children	.542	-.062	-.300	**.883**
Explained Variance	36.5	44.0	43.4	35.8

Gundelach (1994: 43-44, Appendix) claims that the two items about responsibilities of parents and children show the traditional authoritarian family pattern or 'familism' - the acceptance of the subordination of personal interests to the family group's interests and welfare, drawing on Popenoe's (1988: 212 in ibid: 44) definition. In addition, the dimension extracted here is also emphasising the traditional form of family and a traditional view about the nature of women, both of which can be controversial nowadays. Given this, the underlying factor can be interpreted as the '***Traditional Family Values***' an individual holds.

4.10.3 Cross-level equivalence

PCA of these four items at the country level shows that the underlying factor we found in the individual level analysis is not cross-level equivalent. We can extract either one or two factors in analysis at the culture level, and even if we draw only one factor from the country level analysis, it cannot be regarded as the same dimension as that revealed by the individual level analysis (Table 4.10.2). We attempted to find a cross-level equivalent factor by dropping one item about parents' responsibility which revealed very low factor loading when only one factor was extracted at the country level analysis.

Table 4.10.3 Factor loadings of three items on traditional family values at both the individual and the culture level

Input Variables	Factor Loadings on Traditional Family Values	
	Individual level	Culture level (N=50)
Child needs a home with father and mother	.703	.835
A woman has to have children to be fulfilled	.693	.772
One must always love and respect parents	.612	.682
Explained Variance	44.9	58.6

Finally, PCA of only three variables produced a factor solution which was not sensitive to time, place and both and cross-level equivalent (Table 4.10.3). It appears that we are still able to interpret this underlying factor as traditional family values.

4.10.4 Stability

Differences in the level of traditional family values between societies have been well maintained according to our examination of correlations (Table 4.10.4). Traditional family values appear to be one of the societal values characterising the cultural context of each society.

Table 4.10.4 The rank correlation between countries' levels of traditional family values at different points in time

	1990	1999/2000
1981/2	.802** (n=14)	*.795*** (n=13)
1990	1.00	.926** (n=17)

By Kendall's method (tau-b); ** significant at the 0.01 level.

4.11 Analysis of the Group of Optimism

4.11.1 The initial factor analysis with the pooled dataset

While a strong correlation between two items of life satisfaction and happiness is understandable, it was not expected that these two variables would be tightly correlated

with the item about freedom of choice and control. This led us to label this group as 'optimism'. According to Uslaner (1999: 138) optimism is set early in our lives and reflects our values to a great extent, based on 'confidence in capacity to control our own fate'. Here, we need to differentiate 'controlling our own fate' from 'having confidence in capacity to control our own fate'. Whilst our third item is asking whether respondents feel they are controlling their own fates,[80] it does not elicit whether respondents have confidence or not. In other words, there is no information on whether a respondent is satisfied with her controlling – they can be a 'pessimistic self-controller ('I always control my own fate but it is getting worse') as Uslaner assumes that there can be 'pessimistic trusters and optimistic distrustuers' (Uslaner, 1999: 139). Only when self-control leads to satisfaction and happiness, may one be able to have confidence in her capacity to control her own fate. In this, these three items can be linked to optimism. The result of PCA of these three items with the pooled dataset is simple and clear (Table 4.11.1), and as reasoned, it can be interpreted as the dimension of '*Optimism*' individuals have.

Table 4.11.1 The results of factor analysis of three optimism-related items with the pooled dataset and with datasets of each wave*

Input Variables	Factor Loadings			
		Wave		
	Pooled	1 (1981/2)	2 (1990)	3 (99/00)
Satisfaction with life (1 ~ 10 = Satisfied)	.851	.837	.850	.865
Feeling of happiness (1 ~ 4 = Not at all)	-.777	-.803	-.745	-.785
How much freedom of choice and control you have (1 ~ 10 = A great deal)	.663	.652	.668	.673
Explained Variance	58.9	59.0	57.5	60.6

*By PCA (Principal Component Analysis).

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[80] Respondents were asked as follows: "Some people feel they have completely free choice and control over their lives, while other people feel that what they do has no real effect on what happens to them. Please use this scale where 1 means "none at all" and 10 means "a great deal" to indicate how much freedom of choice and control you feel you have over the way your life turns out".

4.11.2 Comparability across time and place

This factor solution can be drawn almost identically from datasets of each wave, each country and each country at each wave. The dimension of optimism appears to be comparable across time and place.

Table 4.11.2 The cross-level equivalence of the dimension of optimism by PCA of the same three items at the culture level

Input Variables	Factor Loadings on Optimism Culture level (N=52)
Satisfaction with life (1 ~ 10 = Satisfied)	.943
Feeling of happiness (1 ~ 4 = Not at all)	-.840
How much freedom of choice and control (1 ~ 10 = A great deal)	.807
Explained Variance	74.9

4.11.3 Cross-level equivalence

The culture level analysis of these three items also extracts one underlying dimension which can be interpreted as optimism (Table 4.11.2).

4.11.4 Stability

Examination of correlations between country scores on optimism at different time points shows that the difference in the level of optimism between countries has been well maintained over time (Table 4.11.3). We therefore accepted optimism as one of the societal values.

Table 4.11.3 The rank correlation between countries' levels of optimism at different time points

	1990	1999/2000
1981/2	.692** (n=14)	*.848*** (n=12)
1990	1.00	.750** (n=16)

By Kendall's method (tau-b); ** significant at the 0.01 level.

4.12 Analysis of the Group of Autonomy

4.12.1 The initial factor analysis with the pooled dataset

The last group consists of six items seemingly relevant to individual autonomy. It was desirable to extract only one factor from PCA with the pooled dataset (Table 4.12.1). This underlying dimension appears to be related to individualism (valuing imagination and devaluing good manners) and autonomy (valuing independence, devaluing authority and obedience and emphasising determination perseverance). Because of this, we interpreted the dimension as '***Individualism-Autonomy***'. In fact, three variables out of these six items were used in Inglehart's 'Autonomy Index': items about independence, determination perseverance and obedience.

Table 4.12.1 Factor loadings of 6 autonomy-related items by the pooled data set and the data set of each wave*

Input Variables	Factor Loadings			
			wave	
	Pooled	1 (1981/2)	2 (1990)	3 (99/00)
Important child qualities: Independence (0 / 1 = mentioned)	.620	.595	.602	.614
Future change: Greater respect for authority (1 ~ 3 = Bad thing)	.612	.602	.596	.588
Important child qualities: Obedience (0 / 1 = mentioned)	-.542	-.519	-.537	-.613
Important child qualities: Imagination (0 / 1 = mentioned)	.515	.500	.516	.464
Important child qualities: Determination Perseverance (0 / 1 = mentioned)	.435	.383	.456	.391
Important child qualities: Good manners (0 / 1 = mentioned)	-.427	-.492	-.515	-.560
Explained Variance	28.2	27.1	29.1	29.7

*By PCA (Principal Component Analysis); extracting only one factor is desirable in all analyses.

4.12.2 Comparability across time and place

Analysis of data by each wave does not alter this factor solution (Table 4.12.1). However, PCA by country reveals that some items are problematic for drawing the same

underlying dimension. For example, the item of obedience, which was loaded negatively on the dimension of individualism-autonomy in analysis of the pooled dataset, is loaded positively in Japanese case. The item of good manners shows the same problem in analysis of data for Iceland. These two items are also very poorly correlated with other input variables within some countries' data. We therefore dropped these two items.

Although PCA of four items extracted one dimension, again in analyses of each country's dataset the variable about determination perseverance showed non-factorable correlations with other input items from time to time – the variance of this item was almost unexplained by the underlying factor in German and Greek cases. There was an additional discard of one variable.

The three variables left could extract one underlying factor which appears not to be sensitive to change of dataset by wave and country. However, in analyses by each country at each wave, it was found that two variables about respect for authority and independence were loaded very lightly on the factor within some datasets. It seems that this autonomy group is not appropriate for extracting any underlying factor based on comparable notions across time and space. Possibly, people's notions about these items are different from society to society and they also change over time. We tested this through simple and descriptive analysis.

Firstly, the top three and the bottom three countries in terms of the percentage of respondents answering 1 to each of five dichotomous variables are compared (Table 4.12.2). The percentages of the top three countries range from double to six times those of the bottom three, implying that people's notions in these countries are different. For example, the Danes' understanding of independence may not be the same as the Portuguese's – over 70% of Danes emphasise independence as an important quality in children whilst only 23% of Portuguese do. What Britons, over 40% of which value obedience, think of the word 'obedience' appears to be different from what the Japanese do, only 7% of which value obedience. Possibly, obedience means respect for

'respectable' authority in the UK, whilst it means a kind of attitude reflecting a hierarchical tradition which is seen negatively in modern Japan.

Table 4.12.2 The percentages of people answering 1 (mentioned) towards five autonomy-related questions in the top three and bottom three countries

	Countries and percentages of people answering 1			
	Top three		Bottom three	
Important child qualities: Independence (0 / 1 = mentioned)	DEN	72.2%	POR	23.3%
	GER	71.2%	FRA	24.0%
	NOR	69.5%	AUS	24.5%
Important child qualities: Obedience (0 / 1 = mentioned)	POR	42.2%	JAP	6.9%
	UK	41.9%	GRC	10.8%
	AUS	41.1%	DEN	16.1%
Important child qualities: Imagination (0 / 1 = mentioned)	SPA	32.7%	ITA	11.7%
	SWE	32.3%	AUS	13.4%
	SWZ	30.4%	IRE	15.8%
Important child qualities: Determination Perseverance (0 / 1 = mentioned)	GRC	54.3%	AUS	18.1%
	JAP	50.8%	SPA	20.2%
	GER	48.7%	IRE	21.2%
Important child qualities: Good manners (0 / 1 = mentioned)	FIN	86.5%	FRA	47.6%
	LUX	83.4%	AUS	52.8%
	UK	82.7%	SWZ	59.2%

Secondly, the change in the percentages of people answering 1 over time within a society was examined (Table 4.12.3). As expected, very wild fluctuation was found – dramatic increases and nosedives over time (the examples in Table 4.12.3 are not the extreme cases). It may not be reasonable to assume that people's notion of, for example, independence has changed greatly for one or two decades. Instead, this fluctuation may reflect the fact that people's choice of important children's qualities is dependent upon situations – the original question is asking respondents to choose five out of a long list as the most important children's qualities. As a result, this group of autonomy could not extract any underlying dimension stable over time.[81]

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[81] It is questionable whether Inglehart's 'Autonomy Index' is a comparable measure across societies - this index is based on four items of independence, determination perseverance, religious faith and obedience as

Table 4.12.3 Change in percentage of respondents answering 1 (mentioned) towards six autonomy-related items over time in some example countries

Variables	Percentages of respondents selecting as an important child quality			
	Country	Wave		
		1	2	3
Important child qualities: Independence	SWE	18.3	36.4	68.8
Important child qualities: Obedience	ICE	13.9	67.8	17.5
Important child qualities: Imagination	US	9.1	26.7	30.0
Important child qualities: Determination Perseverance	DEN	11.1	30.6	32.0
Important child qualities: Good manners	FRA	21.2	53.2	68.6
Future change: Greater respect for authority	CAN*	7.0	21.7	8.4

* Percentages of people answering 'bad thing'

4.13 Chapter Concluding Remarks

From the analysis of the EVS-WVS data by 10 groups we drew six examples of societal values. These values are comparable across cultures, cross-level equivalent and stable over time, at least within 22 of the most industrialised countries for two decades. These will be used as the six cultural variables in our examination of the effect of cultural context on social policy in our empirical analysis of the ex-ante and the ex-post effect of culture below.

This analysis is, of course, not exhaustive. On the one hand, unlike the study of basic human values (e.g. Schwartz, 1992) these six societal values do not (and do not intend to) cover all aspects of people's values. They are extracted from 'available' data – available for testing stability. That is, we analysed only a part of the information the data provide. Many different and better ways of analysing values data through different methods, which minimise the loss of information may exist. On the other hand, it was a rather statistic- or data-guided exploratory analysis, although this appears unavoidable to some degree. This prevented us from accessing more popular and more promising value dimensions such as solidarity, individualism or work-ethics which have been more popularly and widely researched within social policy analysis.

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important child qualities. According to our examination, three out of these four variables can be based on different notions across countries. However, discussion about this may be beyond our research.

However, the six societal values we have drawn out from our analysis appear not to be 'garbage' or trivial results offering little insight into society. Conversely, they seem to have not a little potential for the cultural analysis of social policy – this will be examined in the next chapter by reviewing these six societal values. Even before then, for example, we can make conjectures about the relation between each of these six societal values (not societal values in total – we do not know how many societal values there are) and welfare: more religious people may be less likely to blame social-structural flaws for problems in society and may be less eager for 'social' (secular) solutions, although they tend to be more devoted to people in need 'personally' (van Oorschot, 2006: 34-36); those with strong traditional ethical values may show greater concern for continuity of the existing social order and less approval of social minorities; in a legally more permissive society we may expect stronger resistance toward certain policies, for example, high levels of taxes and benefits because of concern about other people's cheating; tolerance could be a critical basis for social solidarity and cohesion as amply discussed elsewhere (e.g. Arts & Gelissen, 2001; Spicker, 2003) implying a positive relation with welfare issues in general; since traditional family values emphasise traditional roles for family members, the independence and self-sufficiency of the family, it may be trickier to support families by policy (government interventions) in societies with strong traditional family values (e.g. Chesnais, 1996 in Brewster & Rindfuss, 2000: 284); and optimistic people may be less sympathetic to those in need, favouring autonomous solutions over 'social' solutions. Of course, these hypothetical assumptions cannot be exhaustive, since inferences drawn from the same value would vary by applications to differing issues; nonetheless, they provide some examples of how our six societal values might connect with policy choices.

Finally, our analysis of values leaves not a few concomitant issues which would necessitate further examination. For example, change in notions over time invites attention and may provide insights into the nature of social change. Our data told us that, for instance, suicide has been understood more and more differently from divorce, abortion, euthanasia and homosexuality all of which were similarly tabooed in the past.

For another example, relatively non-aggressive political actions like lawful demonstrations or petitions, which were regarded in the past merely as a way of expressing an interest in politics (not political interests), appear to be seen as serious actions more like unofficial strikes. Given the limited space here, these issues would be dealt with by future studies.

CHAPTER FIVE:

GENERAL REVIEW OF SOCIETAL VALUES

5.1 Introduction

Six societal values were obtained through data analysis in the above. In this chapter we review these values – we will examine change in these values and relationships between these values and attempt to characterise countries and welfare regimes with these values. This general review has two purposes. Firstly, digging a bit deeper into the aspects of the cultural context in object countries is, in its own right, rather a naturally followed request after finding examples of societal values – we need to consider these six societal values in more detail. Secondly, we need to examine further the validity of these six societal values which has not been suggested and introduced in the same way we applied – if they are compatible with findings from the existing research, they would be more credited with validity and potential for cultural analysis.

This review revolves around three questions: whether there is any general pattern of change in culture within these countries in terms of the six societal values; whether we can categorise countries by cultural similarities and differences in terms of the six societal values; and how these values and welfare regimes are related. Although this review is mostly descriptive and limited, it not only provides interesting cultural aspects of societies examined but also generates some issues beyond the boundaries of this thesis, which should be left for future studies.

5.2 Changes in Societal Values

A profile of religiosity by 18 countries (two countries have no available data for religiosity, and another two countries have values for religiosity at only one time point) is presented in Figure 5.2.1. Halman (1996: 199-202) reports that religiosity – although concrete items for measurement of religiosity are different - declined in 15 affluent

countries between 1981 and 1990 with the exception of Italy. This trend can be found here again with a gradually declining pattern of lines for more countries. There is no sudden drop or climb of lines except in the Portuguese case. According to our data, the strongest religiosity exists in the US and Ireland, followed by Italy and Canada. Conversely, it is reported that religiosity is low in Swedish, Japanese, French and Danish societies. This difference in religiosity across societies would be an interesting subject, which requires historical and in-depth cultural studies beyond the limits of this research. Greece shows very similar levels of religiosity to Canada in 1999/2000 while Luxembourg does to the UK in 1999/2000 – both Greece and Luxembourg are not included in this figure.

Figure 5.2.1 18 OECD countries' profiles of religiosity for two decades
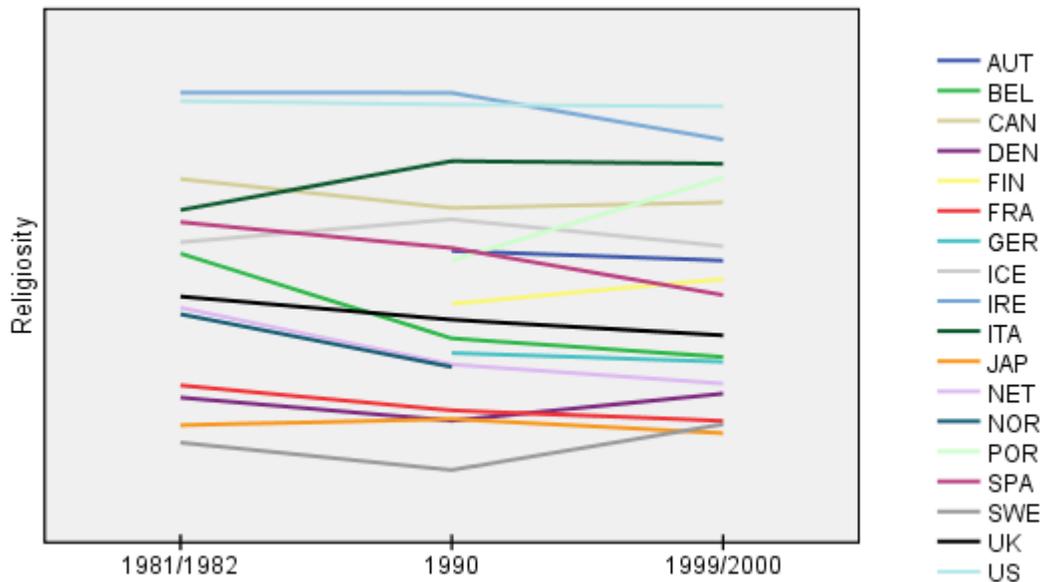
Is a society's level of religiosity associated with the dominant religion of that society? The answer is 'not really'. The 22 object countries in this research can be clustered into four groups by their dominant religions (Table 5.2.1): Protestant dominant; Roman Catholic dominant; Mixed; and other religion dominant countries - Greece (Orthodox) and Japan (Buddhism). Unlike other Protestant dominant societies (where about 95% of people having a religion are Protestants) the percentage of Protestants in the UK is about 70% in our data. At the same time, however, the percentage of Roman Catholics has never been over 20% in the UK – she can thus be classified into the group of the

Protestant dominant society. In the Mixed group, the percentage of both Protestants and Roman Catholics is over 30 but below 60.

Table 5.2.1 Groups of 22 OECD countries by the dominant religion*

Protestant dominant	Roman Catholic dominant	Mixed	Others
Denmark, Finland, Iceland, Norway, Sweden, UK	Austria, Belgium, France, Ireland, Italy, Luxembourg, Portugal, Spain	Australia, Canada, Germany, Netherlands, Switzerland, US	Greece Japan

*Based on the EVS-WVS (1999/2000) data.

The profile of religiosity by countries above (Figure 5.2.1) can be re-coloured according to the dominant religion (Figure 5.2.2) – without Japan and Greece. It is difficult to contend any general patterns from this figure. One may argue that the Protestant dominant societies show slightly lower religiosity. However, according to our data it can also be said that, for example, Protestant Icelanders, Finns and Britons are more religious than Roman Catholic Belgians and French, or than the 'mixed' Germany and the Netherlands. Religiosity appears to differ from having a specific religion – the degree of faith has little relevance to the type of faith, which is in accordance with the existing studies' findings (Roccas & Schwartz, 1997; Schwartz & Huismans, 1995).

Figure 5.2.2 Religiosity in 17 OECD societies by their dominant religions
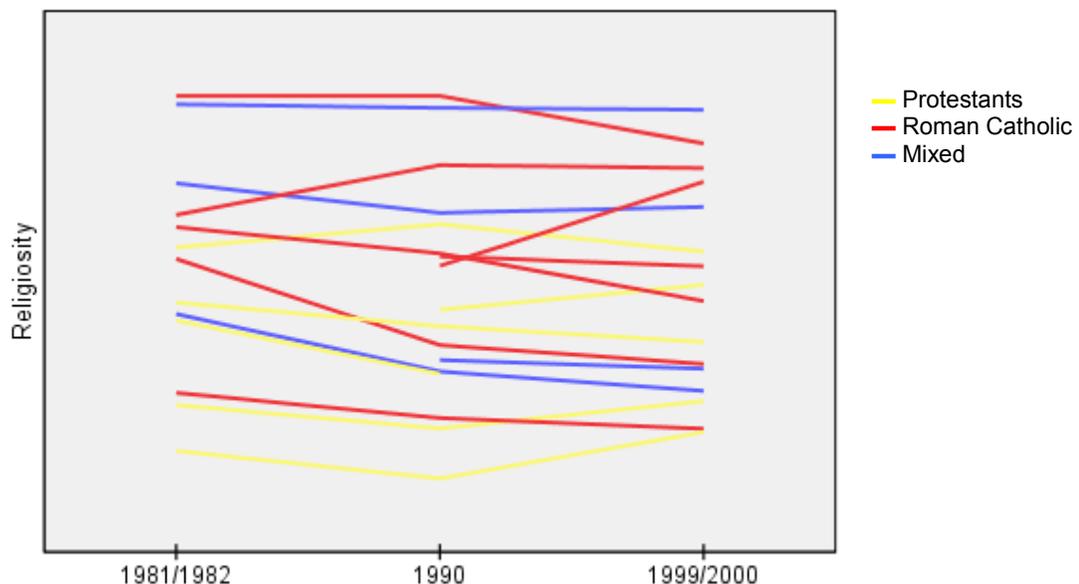
Figuring a profile of religiosity by age groups, drawing on Heinemann's (2007) method, can facilitate examination of both the cohort effect and the age effect on value change, although our data is not longitudinal. Since this method makes overlapping age-zones between different birth cohorts, the cohort effect can be easily inspected by the difference in lines within these overlapped age-zones. The age effect can be examined through the slope of each line and the general pattern, if any, of all presented slopes. In this research, respondents are grouped into six cohorts by their years of birth. The age profile of religiosity (Figure 5.2.3) shows that individual religiosity is likely to increase slightly later in life (the age effect). The cohort effect is seen only between the older four cohorts – that is, there is no clear difference in religiosity between the three younger cohorts. It seems that the influence of religion on the most industrialised societies has weakened but is now stabilised (possibly because it has bottomed out) at least within the post-war generations. Thus it can also be conjectured that the decrease of religiosity in these countries (Halman, 1996) may have been slowed down and will stop in the near future.

Figure 5.2.3 The age profile of religiosity by six cohorts within 20 OECD countries*
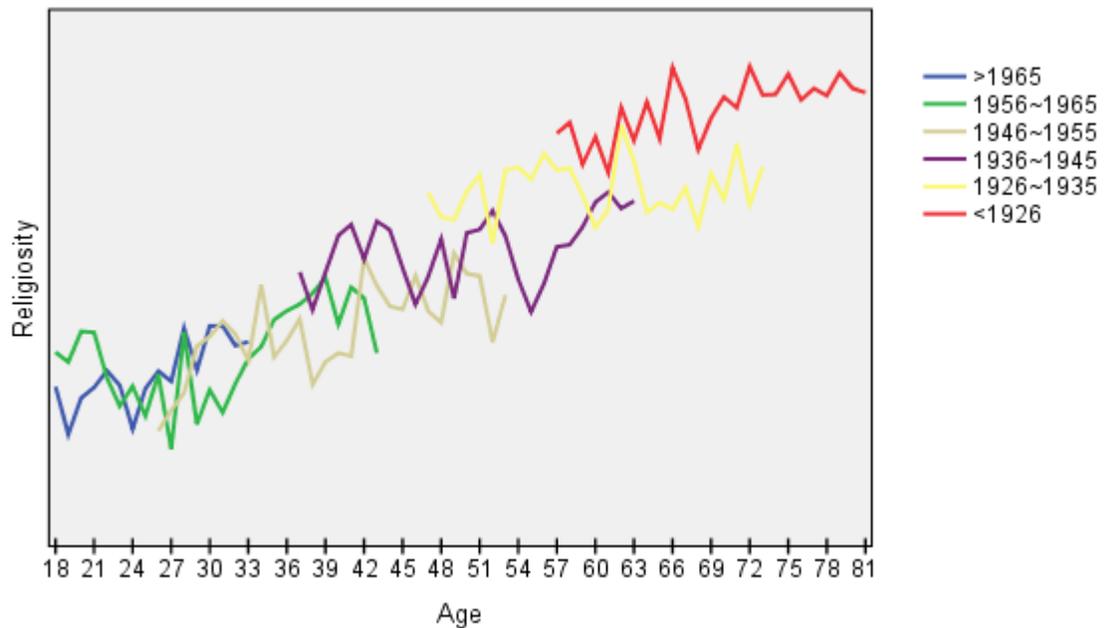
*By the means of cases having at least 100 or more observations for each age

The level of adherence to traditional ethical values of each society for two decades is presented in Figure 5.2.4. As expected, the levels of traditional ethical values have decreased over the last 20 years in all object societies except Finland. This reminds us that Finland was one of the few countries where religiosity has increased (Figure 5.2.1). According to this figure, the level of adherence to traditional ethical values is distinctively higher in Ireland followed by Portugal and lower in the Netherlands and Sweden. It appears that the differing levels can be partly explained by the level of religiosity of each society - societies with stronger religiosity are likely to present lines higher up in the figure. As discussed above (Section 4.4.1) traditional ethical values are closely related to religious beliefs and dogma.

Figure 5.2.4 17 OECD countries' profiles of traditional ethical values
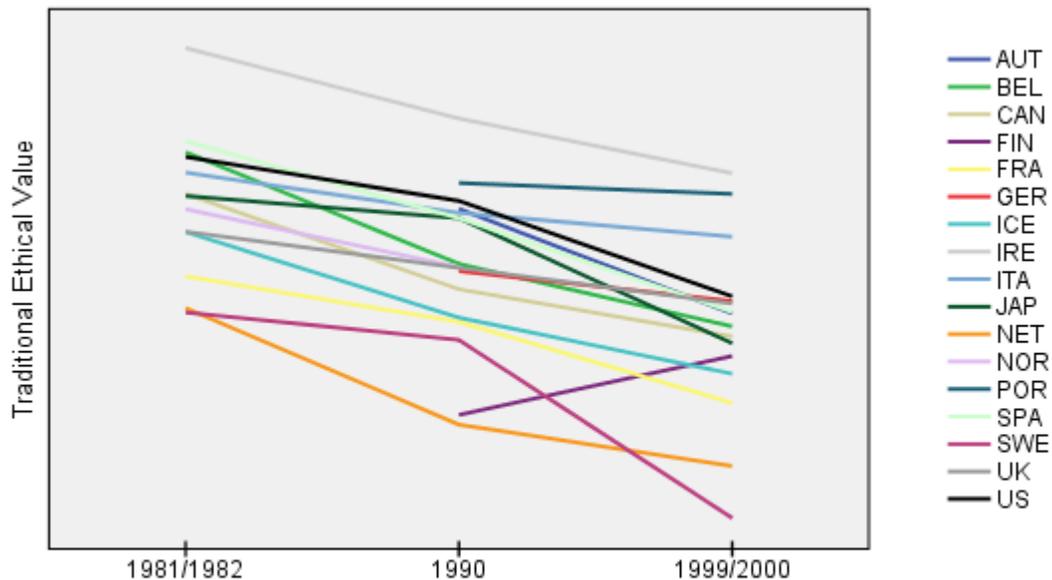
Only 17 countries are figured here, since five countries have data for only one time point. Australia shows a similar level to France at 1981/2, so does Denmark to Netherlands at 1999/2000. The Greek society is close to the Spanish and British societies in terms of how strongly it adhered to traditional ethical values in 1999/2000, while the Luxembourgian society is so to the Icelandic society in 1999/2000. Switzerland can be placed between Japan and Belgium at 1990 according to our data.

The same pattern of decreasing levels of traditional ethical values can be found amongst the age-cohort profile (Figure 5.2.5). A clear cohort effect between all six birth cohorts is presented. This figure suggests that the younger generations of the 22 OECD countries are likely to place less emphasis on traditional ethical values than their elders. It is expected that the level of orientation to traditional ethical values will decrease further in the future, at least in the 22 societies analysed here.

Figure 5.2.5 The age profile of traditional ethical values by six cohorts within 22 OECD countries*
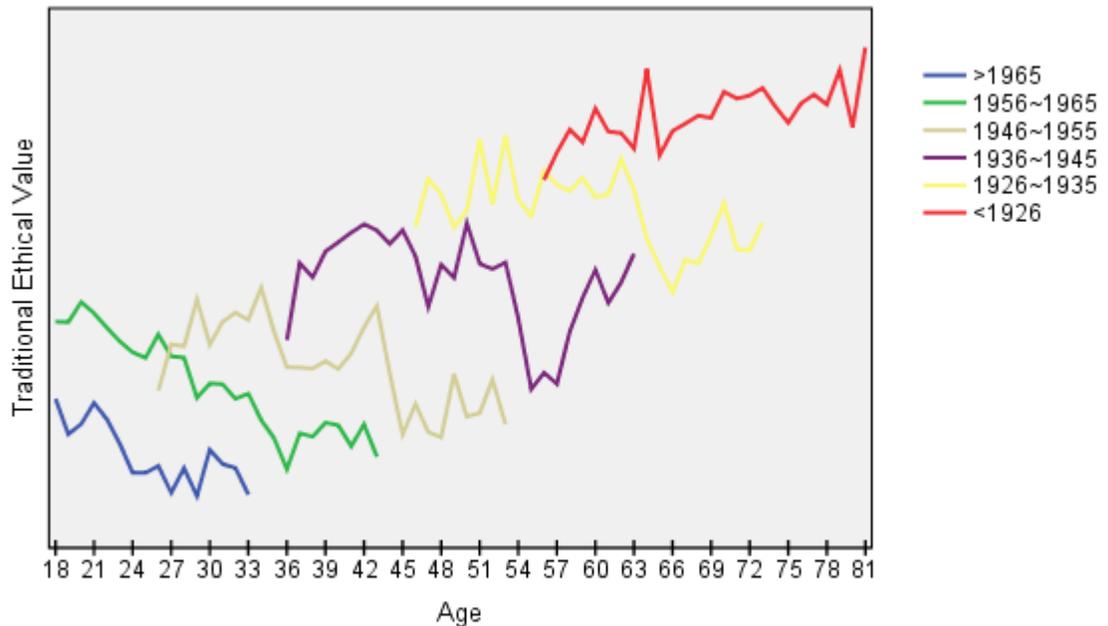
*By the means of cases having at least 100 or more observations for each age

Meanwhile, no general pattern of age effects was found. Younger people, especially those born after the Second World War, seem to increasingly lose their faith in traditional ethical values as they become older. Conversely, the oldest cohort shows the reverse pattern. In the meantime, we can see a clear drop in lines of all cohorts except the oldest one, where approximately scores from the third wave start to be presented. There might have been a strong impact of a certain external factor on this value dimension in the 1990s. This may be partly compatible with the common understanding that social debates and discussions on issues like homosexuality and euthanasia have rapidly increased in 1990s.

In the profile of legal permissiveness by 17 societies (Figure 5.2.6) exclusively high levels of 'legal permissiveness' of France and Belgium were presented, compared with distinctively low levels in the Danish and Japanese societies. However, we could not apply the explanation discussed above (Section 4.5.1) that Anglo-Nordic countries would show greater respect for laws which had been made to protect individual rights whilst Continental counterparts would show less respect for laws made to regulate people. In-between lines and referred countries in the figure do not support this conjecture. Possibly, such historical contexts have a mixed effect. For example, Anglo-Nordic people might place more emphasis on individual freedom than the law. Also, citizens of the Continental countries may be more used to the 'regulating' system. Or, whilst the Northern Europeans had regarded offences to the state as a sin because of their religious tradition (the unity of church and state), their religion and church lost social authority earlier than in the Southern Europe as a consequence of the Reformation.

Figure 5.2.6 17 OECD countries' profiles of legal permissiveness
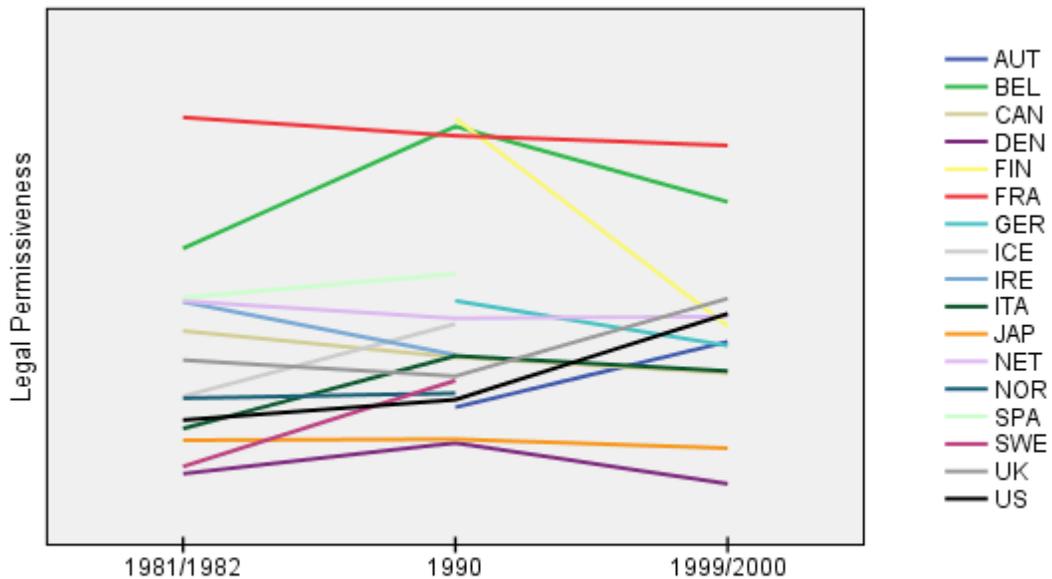
Finland presents an exceptional pattern again, as it did for religiosity and traditional ethical values. Put together, our data shows that Finnish society has become more religious, more strongly adherent to traditional ethical values and stricter about laws during 1990s. Cautiously, in some aspects, one can say that the Finn public became

more 'conservative' - in terms of its great emphases on tradition, religion and law and order (cf. Goodwin, 2007 especially Ch. 7). This change during the 1990s appears to be exclusive in Finland amongst the more industrialised Western countries, which would be an interesting subject for future study.

There are five countries not figured here because their data is available for only one wave. Australia shows slightly stronger Legal Permissiveness than Spain at 1981/2. Portugal can be placed fourth from the top following Finland, Belgium and France at 1990. At 1999/2000, Greece shows a distinctively higher level of legal permissiveness than any other country, while Luxembourg shows a slightly higher level than Belgium. Finally, Switzerland is of the similar level of legal permissive to Austria at 1990.

Figure 5.2.7 The age profile of legal permissiveness by six cohorts within 22 OECD countries*
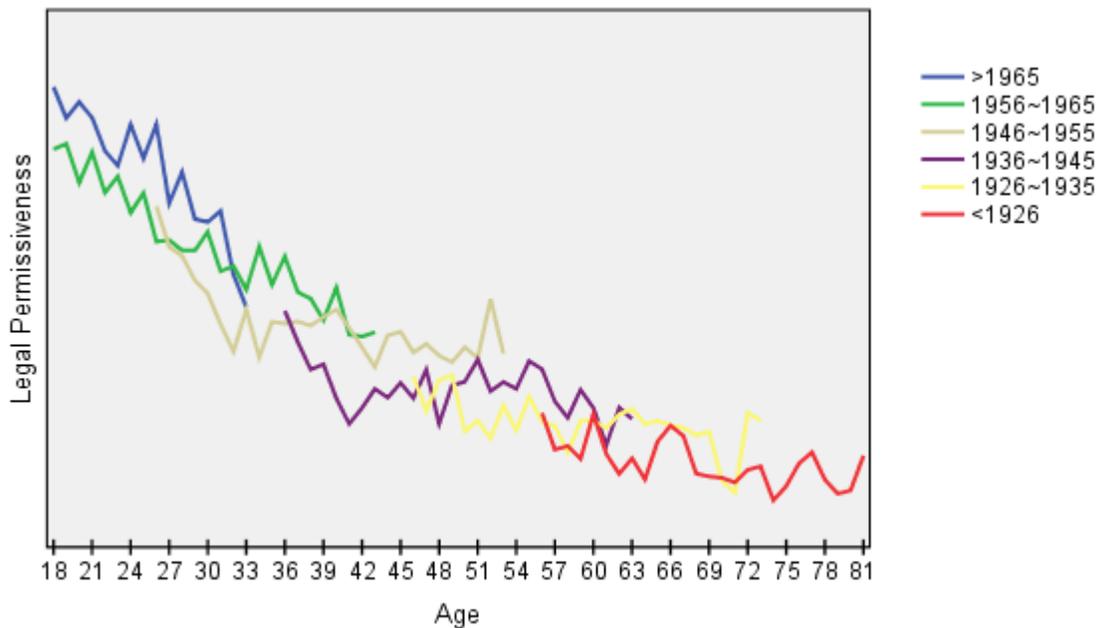
*By the means of cases having at least 100 or more observations for each age

The age profile of legal permissiveness (Figure 5.2.7) suggests, at the first glance, no cohort effect but a clear age effect - all six lines appear to be one line with a certain slope if viewed from a distance. In more detail, the decreasing age effect seems to be weakened over a certain age, say, during people's 30s and 40s. In other words, the age effect lessening legal permissiveness tends to be strong within younger age groups but

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fades away with age. A weak cohort effect of increasing legal permissiveness also presented – younger generations can be slightly more permissive to laws than senior colleagues.

Figure 5.2.8 The profile of tolerance by 18 OECD countries
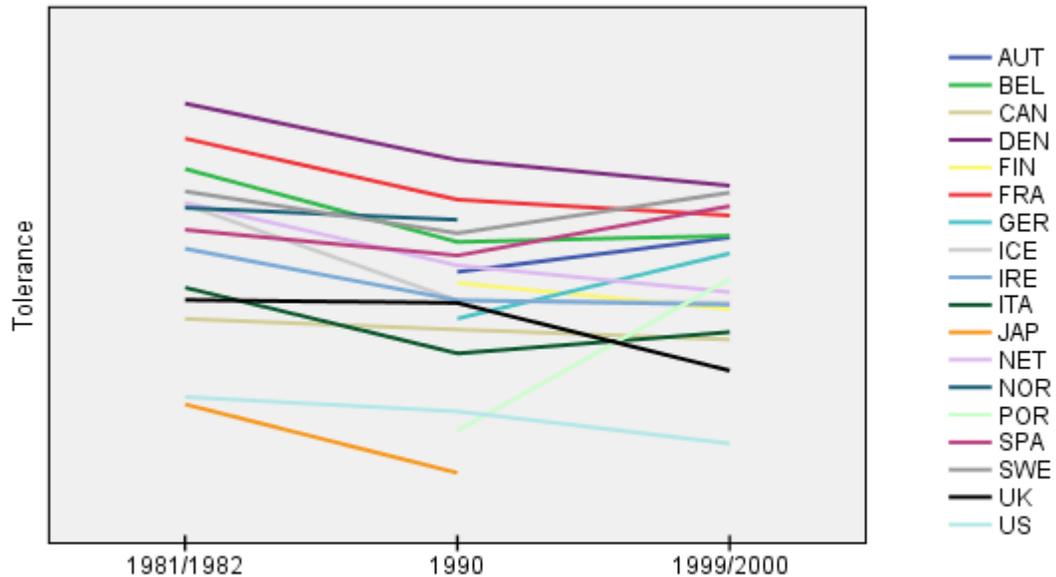
What the countries' profile of tolerance for two decades (Figure 5.2.8) tells us at a first glance is that there has been a decline in levels of tolerance. Exceptions to this are the lines for Sweden, Spain, Austria, Germany and Portugal. In particular, the level of tolerance in Portuguese society increased rapidly in the 1990s. Whilst the differences in the levels of tolerance between object countries are not that great, the figure shows that the level of tolerance in Japan, US, Canada and the UK is lower than other countries and lowering over time. From this, it appears conjecturable that there would be a kind of relation between the level of tolerance and the Liberal welfare regime. This will be discussed later in this chapter (Section 5.4). Four countries not represented in this figure are Australia, Greece, Luxembourg and Switzerland who have data for only one point in time. Australia could be placed between the US and Canada in 1981/2. According to our data, the level of tolerance in Greece in 1999/2000 was lower than the level in the US at that moment. In 1999/2000, the level of Luxembourg was similar to that of Denmark, whilst the level of Switzerland was higher than that of any other society in 1990.

Figure 5.2.9 The age profile of tolerance by 6 cohorts within 22 OECD countries*
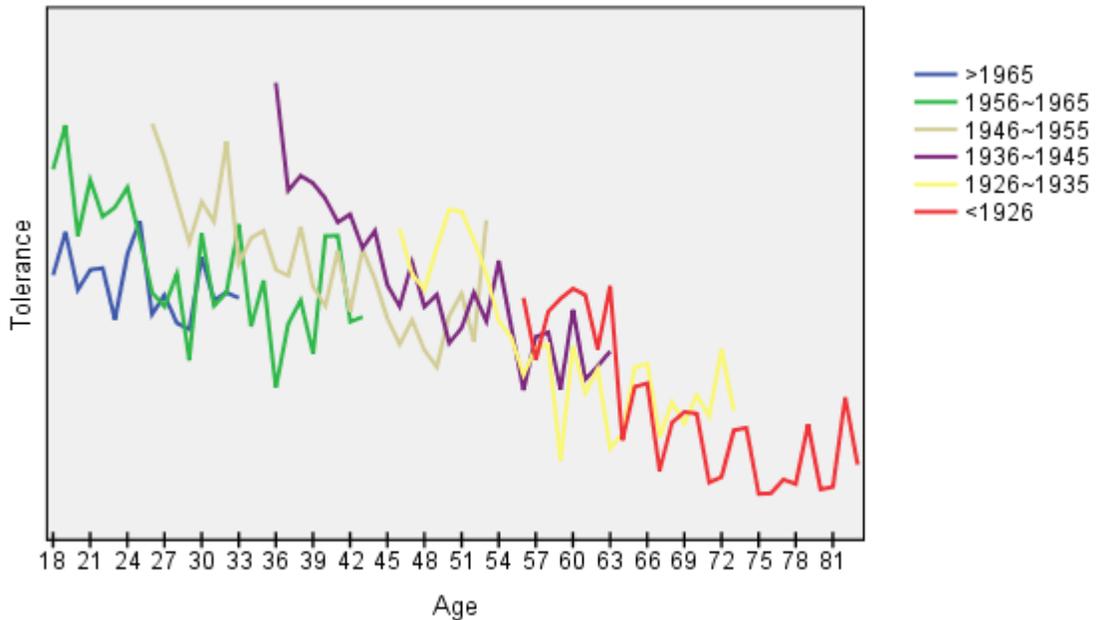
*By the means of cases having at least 100 or more observations for each age

The cohort effect presented in the age profile of tolerance (Figure 5.2.9) can partly explain the decline in the level of tolerance we saw above. Interestingly, there seems to be differences in the patterns of the three older cohorts and three younger cohorts – a decreasing age effect but no cohort difference between the three older cohorts and a decreasing cohort effect with a very weak age effect between the three younger cohorts. Although the younger generations appear to be less tolerant, contributing to the decline in the general level of tolerance, their tolerance levels will eventually stabilise since the younger generations do not tend to become less tolerant with age, unlike their elder counterparts. Since the differences in the three older and three younger cohorts can also be related to the world war experience, we may need to examine the influence of the war-experience on values. This would be the task of a future study.

In the profile of traditional family values by 18 countries (Figure 5.2.10) there is no sudden increase or drop of lines over time - countries with higher levels of traditional family values in 1981/2 stay in the upper half of the table at future points in time, just as countries with lower levels stay in the bottom half. This stability in terms of the level of

traditional family values is interesting given that it is a common understanding that the family is changing – members' roles, its format and social role as the crucial and basic social unit. On the whole, this figure is in accordance with Chesnais' (1996 in Brewster & Rindfuss, 2000) differentiation of 'nations of families' like Germany and Italy where family plays essential role in various aspects of life, from 'nations of individuals' like Sweden and the UK where strong individualism and social equality exists. Lines for Germany, Austria, France, Italy and Japan form the upper part of this figure (more traditional family values oriented), whilst those for the Netherlands, Finland, Sweden, Norway, the UK and the US formed the lower part (weak traditional family values). Two countries not presented in this figure are Luxembourg, which can be placed in a slightly higher position than Canada at 1999/2000 and Greece which shows stronger traditional family values than Italy but weaker than France at 1999/2000.

Figure 5.2.10 18 OECD countries' profiles of traditional family values
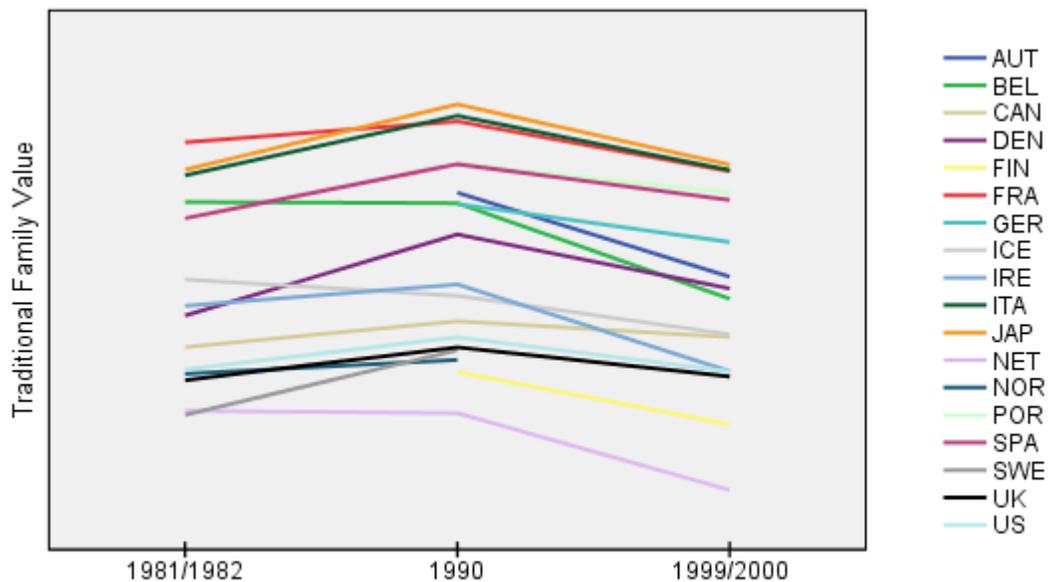
The age-cohort profile of traditional family values (Figure 5.2.11) gives quite a clear sign of (increasing) age effect – six lines forming one shape if seen from a distance. Except for the youngest cohort, the level of traditional family values increases as an individual becomes older. It appears that younger members of society do not have different family values from those of senior members in spite of seniors' concerns about this.

Figure 5.2.11 The age profile of traditional family values by six cohorts within 20 OECD countries*
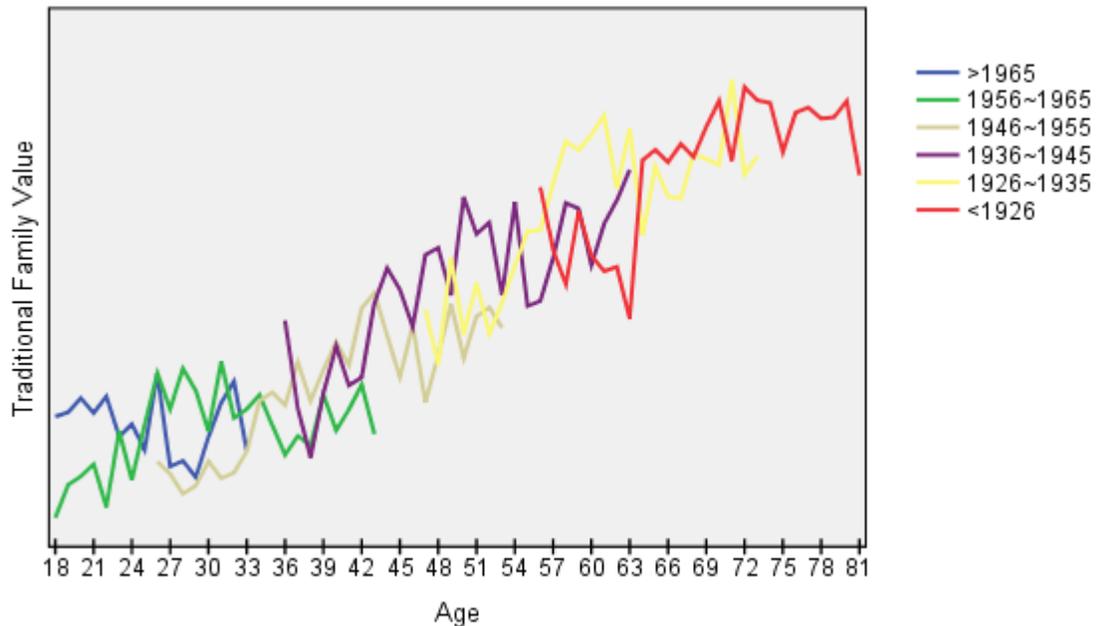
*By the means of cases having at least 100 or more observations for each age

The profile of optimism by 18 OECD countries (Figure 5.2.12) shows that the level of optimism has increased for two decades in most societies. In this respect, the Swedes' loss of optimism, especially in the 1990s, invites our concern as an exception. Within our data, Sweden is the only country whose level of optimism at 1999 is lower than the level at 1981. Optimism in the UK also fell slightly in the 1980s but she has no available data for 1999/2000 when all the other countries that lost a certain degree of optimism in the 1980s enjoyed an increase in their levels of optimism.

Overall, countries with a lower level of optimism stand out since lines for most countries are crowded in the upper part of the figure. It is interesting that three out of the five countries with the lowest levels of optimism are Latin-southern European countries including Italy, Spain and Portugal. Greece also shows low levels of optimism which, if included in this figure, can be placed between Italy and Japan at 1999/2000. If included, Switzerland would be the country with the highest level of optimism at 1990, while Australia and Luxembourg would be placed close to Sweden at 1981/2 and 1999/2000, respectively.

Figure 5.2.12 18 OECD countries' profiles of optimism
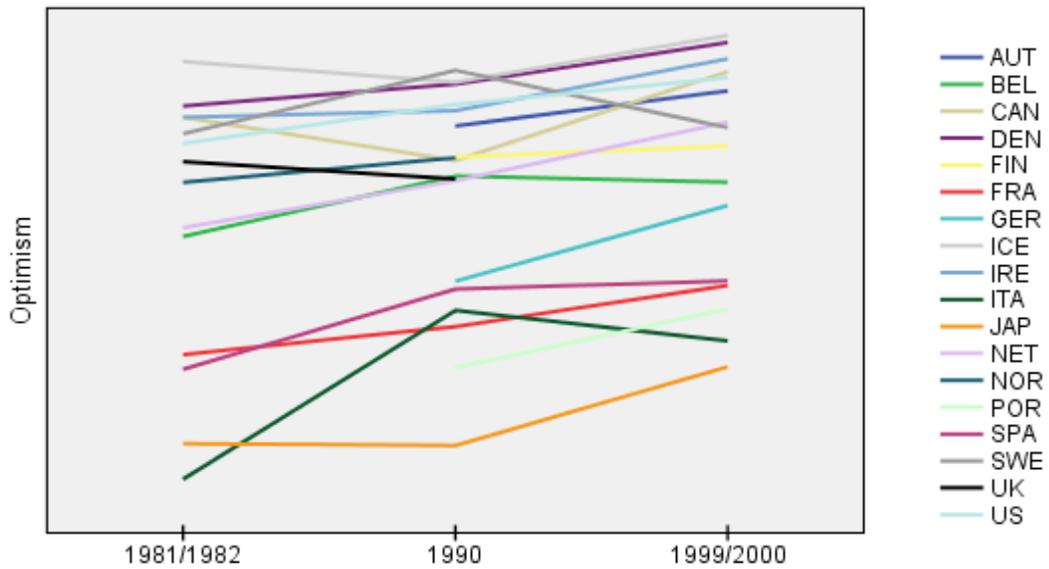
Whilst the age effect is not clear in the age profile of optimism (Figure 5.2.13), lines for younger cohorts are clearly placed in higher positions in the figure, implying that there is an increasing cohort effect.

Figure 5.2.13 The age profile of optimism by 6 cohorts within 22 OECD countries*
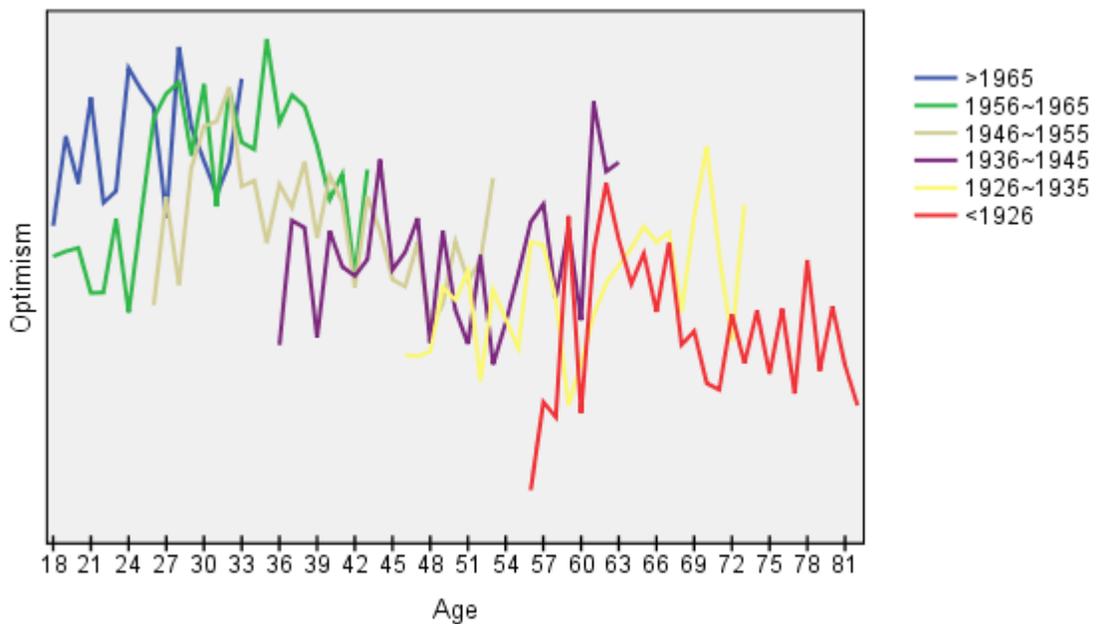
*By the means of cases at least 100 or more observations for each age

This cohort effect may explain the increasing levels of optimism seen in most societies above (Figure 5.2.12). This is quite contrasting with the age-cohort profile of traditional family values (Figure 5.2.11) where only the age effect was distinctive. As Uslaner (1999: 138) points out, Optimism appears to be set early in our lives and not to change much.

5.3 Societal Values and Welfare States

The change in the average level of each societal value in countries having data for all three time points is examined (Table 5.3.1) – given that the six societal values are based on comparable measures across about 22 OECD countries, we may be able to extend our generalisation cautiously. According to our data, it appears that the levels of religiosity, traditional ethical values and tolerance have decreased for two decades throughout most of the industrialised world as a whole, whilst at the same time this part of the world seems to have become more optimistic and slightly more permissive. Traditional family values appear to have been more important in the 1980s but to have slightly declined in influence during the 1990s.

Table 5.3.1 Change in the levels of six societal values within nine to 13 societies over time*

Values	Year of Survey			Change	Number of countries*
	1981/2	1990	1999/2000		
Religiosity	0.01	-0.06	-0.10	▼ ▼	13
Traditional Ethical Values	0.32	0.05	-0.25	▼ ▼	12
Legal Permissiveness	-0.06	-0.01	-0.01	▲ ▬	9
Tolerance	0.13	-0.01	-0.03	▼ ▼	12
Traditional Family Values	-0.03	0.11	-0.10	▲ ▼	13
Optimism	-0.10	-0.08	0.06	▲ ▲	12

* By the means of countries having data for all three waves

The commonly held view that values have fragmented and diversified, and that individualism and autonomy are becoming more and more emphasised, seems to be at least partly in accordance with our findings. People seem to be less concerned about religion, religious beliefs and dogma, and less frequently attending religious services (declining religiosity). Moral issues such as divorce and abortion, which were ethically taboo in the past, are now controversial (declining traditional ethical values). It seems that people value and enjoy freedom of choice and autonomous decision making more (increasing optimism). Individualised and autonomous persons may be less tolerant of people different from themselves (declining tolerance). However, we should note again that this argument is merely about the general pattern when the change in six societal values is seen from a distance without differentiating each society.

Meanwhile, values have become more and more fragmented. Examination of correlations between the six values at the individual level shows that there is a weakening pattern of correlations between these values over time. Out of all 15 correlation coefficients (there are 6*6=36 cells in the correlation matrix, but 6 cells in the diagonal line must have 1 as their coefficient and half of the 30 cells are diagonally identical to the other half) there were nine coefficients over 0.1 in terms of the absolute value at the first wave (1981/2). This number decreased to eight at the second wave (1990) and seven at the third wave (1999/2000). If a criterion of 0.2 is applied, the number was five at the first wave and four at the second and third waves. This examination was attempted again with a smaller dataset – the number of cases at each wave is different and this could affect correlations. Instead of the pooled data (22 countries), the data for only the six countries[82] of which cases had values for all six variables for all three waves were used, and a similar result was found: with the criterion set at 0.1, the number of coefficients satisfying this changed from nine (wave 1) to eight (wave 2 and 3).

Religiosity, which appears to be the most influential value within these six societal values with higher correlations with all other five values, has been loosing its explanatory power

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[82] These countries were Belgium, Canada, France, Italy, the Netherlands and the US.

for other values for two decades (Table 5.3.2). Except for with traditional family values, correlations of religiosity with other values have been weakened. In this aspect, the argument of the modernisation theory is partly supported by this data: "In traditional society certain values (Judeo-Christian morality) were the foundation for the individual's behaviour in all aspects of life, but the segmentation of society meant that such basic values had increasingly little or no impact on other kinds of values." (Gundelach, 1994: 39)

Table 5.3.2 Change in correlations (at the individual level) of religiosity with other values over time

	Year of Survey	Traditional Ethics	Legal Permissiveness	Tolerance	Traditional Familism	Optimism
	1981/2	.534**	-.284**	-.195**	.137**	.138**
Religiosity	1990	.554**	-.277**	-.182**	.216**	.089**
	1999/2000	.504**	-.201**	-.182**	.218**	.078**

Within the dataset of six countries of which cases have scores for all six values at all three waves.
** Significant at the 0.01 level

With regard to the cross-level fallacy (ecological and reverse ecological fallacy) correlations at both individual and culture levels between the six values were compared (Table 5.3.3 and Table 5.3.4). At the culture level, our data partly support the claim by Lipset and Lenz (2000) that Protestantism is related to less corruption because of its links to more individualistic and less 'familistic' features since strong family values can raise particular-ism like nepotism. Within our data, most societies with weaker traditional family values are Protestants dominant countries like the UK, Norway, Sweden and Finland, and the level of traditional family values is positively correlated with the level of legal permissiveness at the culture level (Table 5.3.3). That is, Protestant dominant societies are likely to be less permissive about laws. However, this relationship cannot be found at the individual level. Having stronger family values appears to be almost irrelevant to attitudes towards laws (correlation coefficient of -0.043 at the individual level, Table 5.3.4): whilst we cannot say that *an* individualistic individual is stricter in keeping laws, it seems that *the* individualistic individual*s* can be 'keepers' for all.

Table 5.3.3 Correlations between six values at the culture level

	Traditional Ethical Value	Legal Permissiveness	Tolerance	Traditional Family Value	Optimism
Religiosity	.609** (n=50)	.024 (n=46)	-.451** (n=50)	-.031 (n=51)	.144 (n=50)
Traditional Ethical Value	1	-.125 (n=47)	-.248[a] (n=51)	.326* (n=50)	-.263[a] (n=51)
Legal Permissiveness		1	-.051 (n=47)	.247[a] (n=46)	-.231 (n=47)
Tolerance			1	-.091 (n=50)	.272[a] (n=51)
Traditional Family Value				1	-.721** (n=50)
Optimism					1

** Significant at the 0.01 level; * significant at the 0.05 level; [a] significant at the 0.10 level.

To give another example, the negative correlation between religiosity and legal permissiveness at the individual level (Table 5.3.2 and 5.3.4) reminds us of Alm and Torgler (2006) who contend that tax morale is positively correlated with religiosity and the frequency of church attendance. Yet, according to the culture level correlations (Table 5.3.3), we do not know whether a more religious society is likely to be less permissive towards its laws.

Table 5.3.4 Correlations between six values at the individual level

	Traditional Ethical Value	Legal Permissiveness	Tolerance	Traditional Family Value	Optimism
Religiosity	.528**	-.252**	-.181**	.195**	.094**
Traditional Ethical Value	1	-.285**	-.129**	.384**	.008
Legal Permissiveness		1	.095**	-.043**	-.061**
Tolerance			1	-.031**	-.020**
Traditional Family Value				1	-.090**
Optimism					1

Within the dataset of 6 countries of which cases have scores for all 6 values at all three waves.
** Significant at the 0.01 level.

For examination of the cultural characteristics of countries in terms of these six societal values, it would be attractive to factor analyse these six values again and compare countries with only one or two dimensions drawn from this. As discussed above (Section 3.6.2.5), however, a further data reduction (factor analysis) is not attempted here.[83] Instead, we need to inspect further the correlations between the six values at the culture level (Table 5.3.3), although here this is merely descriptive. If we look at the signs (plus and minus) of correlation coefficients, for example, although religiosity and traditional ethical values are strongly correlated to each other, they are correlated with other values in different directions. Even if we consider only statistically significant coefficients – a more generous significant level (the 0.1 level) is applied here since the number of cases is small (51 at maximum) - there is no logical circle linking all 6 values. With strong religiosity we can expect strong traditional ethical values and strong traditional ethical values are associated with strong traditional family values, but strong traditional family values cannot predict strong religiosity. Strong religiosity can predict weak tolerance and weak tolerance can predict weak optimism, but weak optimism cannot predict strong religiosity. That is, one or two value-dimensional categorisation of countries with these 6 values is not possible.

As another way of sketching countries in terms of six value dimensions, we attempt to present countries at the two value dimensional space. Although there can be 30 combinations of two dimensions from six values, we pay attention to four combinations – three combinations of stronger correlations (religiosity-traditional ethical values, religiosity-tolerance and traditional family values-optimism) and one of the largest correlations with legal permissiveness (i.e. with traditional family values). Since the total mean of factor scores within the pooled dataset is zero, each country can be

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[83] Nevertheless, PCA of these six societal values was conducted and we could extract either one factor or two factors. When one factor was drawn, the variances of tolerance and optimism were hardly explained by this factor. Factor loading of tolerance on any factor was very low, even when two factors were extracted. This would mean a further big loss of information. Furthermore, the factors were not comparable across countries (in our analyses of datasets by each country) – while religiosity, traditional ethical values and traditional family values were loaded heavily on the same factor invariably across societies, the correlations, factor loadings, communalities and factors on which they were heavily loaded all varied amongst the other three items. On the whole, it appeared not to be desirable to 'condense' dimensions which these six societal values showed.

labelled 'high' (larger than 0) or 'low' (smaller than 0) by its mean factor score for each value. 22 OECD countries are presented in four two-dimensional spaces in Figure 5.3.1.

Figure 5.3.1 22 OECD countries in two-dimensional spaces by four combinations of six values

1) **Traditional ethical values**

Religiosity	High	Low
High	AUT CAN IRE ITA POR SPA US	GRC ICE
— AUS SWZ —		
Low	BEL JAP NOR UK	DEN FIN FRA GER LUX NET SWE

2) **Optimism**

Traditional family Value	High	Low
High	AUT DEN	BEL FRA GER GRC ITA JAP POR SPA
— AUS SWZ —		
Low	CAN FIN ICE IRE LUX NET NOR SWE UK US	

3) **Tolerance**

Religiosity	High	Low
High	AUT ICE SPA	CAN GRC IRE ITA POR US
— SWZ —		— AUS —
Low	BEL DEN FRA LUX NET NOR SWE	FIN GER JAP UK

4) **Legal permissiveness**

Traditional family Value	High	Low
High	BEL FRA GER GRC POR SPA	AUT DEN ITA JAP
— AUS —		— SWZ —
Low	FIN LUX NET	CAN ICE IRE NOR SWE UK US

First of all, this figure tells us that categorising countries by values offers a quite different picture from the familiar ones produced by welfare regime typologies. This reminds us that the four dimensions of public perception of the cause of poverty did not fit any of the welfare typologies (van Oorschot & Halman, 2000). Although subfigures of 1) and 3) share the same value dimension (religiosity), we cannot condense them – if we reflect 1) and 3) together in a 3-dimensional space, each of all eight subspaces has at least one country. However, two subspaces have more countries (five countries for each): Canada, Ireland, Italy, Portugal and the US of strong religiosity, strong traditional ethical values and low tolerance (say, religious-particularised societies); and Denmark,

France, Luxembourg, the Netherlands and Sweden of weak religiosity, weak traditional ethical values and a high level of tolerance (say, secularised-general societies). Yet, we need to remember that there are more countries in these two groups.

Meanwhile, the three values in the subfigure of 2) and 4), if reflected together in a 3-dimensional space, generate only five subspaces having at least one country. The main two groups consist of: Belgium, France, Germany, Greece, Portugal and Spain of strong family values, less optimism and high legal permissiveness (say, liberal-pessimistic-collectivistic societies); and Canada, Iceland, Ireland, Norway, Sweden, the UK and the US of weak family values, strong optimism and low legal permissiveness (say, disciplined-optimistic-individualistic societies). Here again, however, there are too many deviant cases to generalise these two groups.

5.4 Societal Values and the Welfare Regime

In spite of the cultural diversity of the 22 OECD countries (or so-called welfare states) seen above, some may still want to attempt to characterise the welfare regimes with value dimensions. Since it has been argued that different welfare regimes reflect different cultures like liberal work-ethic norms, traditional family-hood, the principles of subsidiarity and universalism (Esping-Andersen, 1990), it can be expected that welfare regimes reflect value-differences to a certain degree.[84]

Investigating welfare states by regimes necessarily invites the issue of selection of a welfare regime typology. There has been ample debate and suggestion on classifying welfare states into different welfare regimes (e.g. see Alcock, 2001; Arts & Gelissen, 2002; Bambra, 2006; Castles, 1998; Castles & Mitchell, 1993; Ginsburg, 1992) since Esping-Andersen's (1990) '*Three Worlds*' typology. We may need a fair amount of discussion about which typology should be considered here, nevertheless, this is omitted

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[84] Also, it is often, if not always, attractive in that the regime theory has been widely regarded as a 'very robust and convincing tool' (Abrahamson, 1999 in Arts & Gelissen, 2002: 155) and a 'dominant theoretical approach within comparative social policy' (Alcock, 2001: 20).

here for reasons of practicality. Instead, drawing on the intensive review of various typologies by Arts and Gelissen (2002) most of the 22 countries can be grouped into four regime types – they are classified into the same regime types across different typologies. Three countries - Iceland, Japan and Switzerland – are not clear in terms of regime types since they have been seen as different regime types by various typologies, or have not been dealt with in typologies. The 19 countries by four welfare regime types are as follows:

1) Liberal: Australia, Canada, Ireland, the UK and the US;
2) Conservative: Austria, Belgium, France, Germany, Luxembourg and the Netherlands;
3) Social Democratic: Denmark, Finland, Norway and Sweden;
4) Latin-Southern: Greece, Italy, Portugal and Spain.

The figure of six values between four welfare regimes (Figure 5.4.1) shows, at first glance, that the four welfare regimes are quite different in terms of societal values. Cases for similar levels are only for traditional family values and optimism between the Liberal and the Social Democratic regimes, and for traditional ethical values between the liberal and the Latin-Southern regimes. It is not easy to find any pattern of value characteristics between welfare regimes beyond describing each regime with each value: for example, the Liberal welfare regime is likely to have very strong religiosity, to adhere to traditional ethical values quite strongly, to be less tolerant, to be a bit permissive about laws and to be individualistic with weak traditional family values and strong optimism (confidence in capacity to control one's own fate).

However, if we take only directions of 'bars' for each regime by each value within the figure, it is revealed that there can be two-dimensional combinations between four regimes. On the one hand, the Liberal and the Latin-Southern regimes go together for religiosity, traditional ethical values and tolerance contrasting with the Conservative and the Social Democratic regimes. On the other hand, the Liberal and the Social Democratic regimes share the same direction in legal permissiveness, traditional family values and optimism contrary to the Conservative and the Latin-Southern regimes. From this, very roughly, four welfare regimes can be characterised with value dimensions as

'the Religious Individual (the Liberal)', 'the Secularised Collective (the Conservative)', 'the Secularised Individual (the Social Democratic)' and 'the Religious Collective (the Latin-Southern)' regimes. This characterisation appears to be compatible with widely accepted knowledge such as the strong individualism orientation in the Liberal and the Social Democratic regime countries. It seems that the welfare regime typology clearly reflects value-differences to a certain degree.

Figure 5.4.1 Levels of 6 societal values between four welfare regime types*
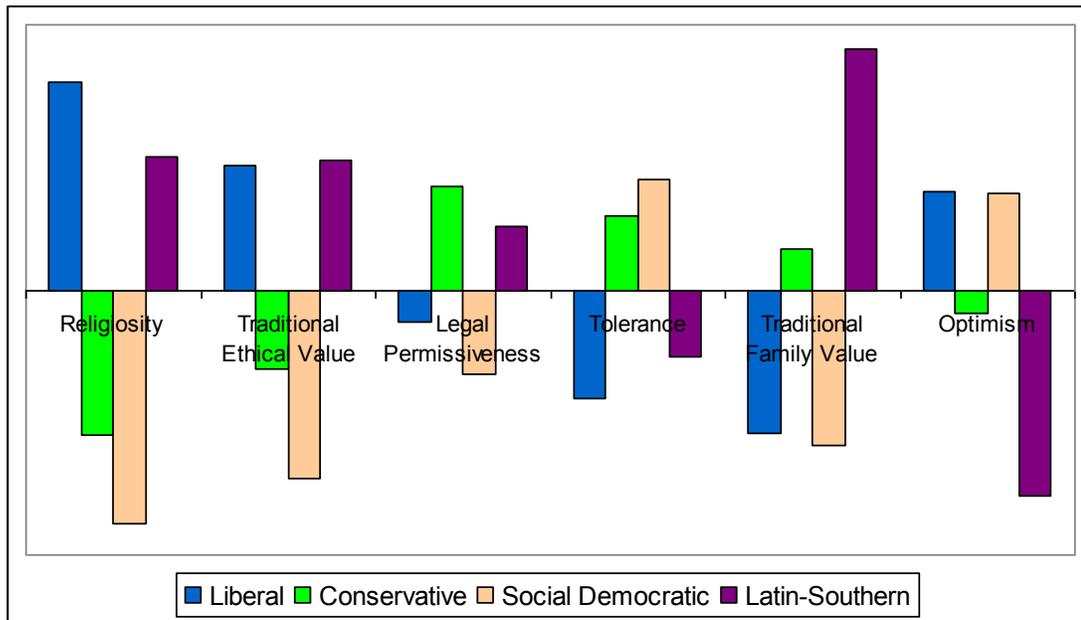
* By the means of country scores of each regime type.

Definitely, however, we need to remember that this is too much of an oversimplification. There are many deviant cases from such a generalisation - countries of the same welfare regime are very different in terms of the six societal values. For example, the Latin-Southern Italy is less permissive towards laws than all the Liberal countries and even Social Democratic Finland. There are too many examples: the UK is less religious than Finland, Norway have stronger traditional ethical values than Greece, and so on. Taking only directions of bars in the figure, we also tend to ignore bigger differences – for example, in terms of traditional family values and optimism, the Conservative regime appears to be closer to the Liberal regime rather than the Latin-Southern regime. In other words, this characterisation of the four welfare regimes with the value dimensions is a

'welfare regime level' phenomenon. In the previous section (Section 5.3) we saw that 'condensing again' the six societal values into two dimensions based on their correlations with each other 'at the country level' was hardly possible – even if it is attempted, two dimensions are not comparable across societies. Such a characterisation is plausible only at a more highly aggregated level – say, the welfare regime level – and not applicable to each welfare state.

The welfare regime reflects neither cultural difference 'only' nor cultural difference 'fully'. The virtue of the welfare regime typology is, as we know, that it offers an overview of diverse welfare states whilst showing the most distinctive and critical features (but only these) of each welfare regime symbolically. As Esping-Andersen admits (1997 in Arts & Gelissen, 2002: 139) this can enable us to see 'the forest' but there can be 'the danger of little resemblance to reality'. We found above that there were too many deviant cases in reality to claim any general value characteristics of a certain country group. In fact, there have been criticisms that Esping-Andersen's classification focused only upon limited factors and ignored other important ones such as gender and familialism (e.g. Lewis, 1992 in Alcock, 2001; Arts & Gelissen, 2002; Cochrane, Clarke & Gerwirtz, 2001). More importantly for us, the effect of culture on social policy cannot really be explored with this kind of simplified version of value-difference 'at the welfare regime level'.

In the meantime, the welfare regime theory is a thesis not only about the diverse welfare systems but also about the institutionalisation of such different welfare arrangements. That is, the welfare state is not merely 'a passive by-product' of industrial development (Esping-Andersen, 1990: 221) and 'the sum total of a nation's social policy repertoire' (Arts & Gelissen, 2002: 139) but an institutionalised powerful force which is critically shaping 'national trajectories' (Esping-Andersen, 1999:4 in Arts & Gelissen, 2002: 140) by self-enhancing the way for different welfare systems (regimes). This implies that each welfare regime encourages value change in different directions, as the institutional explanation of welfare attitudes often suggests (e.g. Larsen, 2006). While this is plausible since welfare attitudes are mostly situational values vulnerable to external

factors according to our conceptualisation (Section 2.4.3), it is questionable whether the welfare regime as the institutional factor has such an impact even on societal values, which are stable over time.

This is examined by ANOVA (analysis of variance) test (Table 5.4.1). As the number of countries (and the number of countries for each regime) for each wave is not the same, only six countries representing three welfare regimes which have data for all six values at all waves are selected - unfortunately, there is no Social Democratic regime country. Although the small number of cases may undermine the robustness of analysis, it is expected to show a certain pattern over time. F-statistics in ANOVA test mean the ratio of the mean difference 'between groups' to 'within group', showing bigger difference between groups than within a group with higher value. If there has been a regime effect, value difference 'between regimes' would have been enlarged whilst value difference 'within regime' would have become smaller – that is, F-statistics would have increased over time.

Table 5.4.1 Results of ANOVA of six values between three welfare regimes by waves*

Values	1981/2		1990		1999/2000	
	F-value	Sig.	F-value	Sig.	F-value	Sig.
Religiosity	4.823	0.12	12.778	0.03	17.821	0.02
Traditional Ethics	0.797	0.53	1.439	0.37	3.108	0.19
Legal Permissiveness	3.135	0.18	2.933	0.20	2.334	0.25
Tolerance	12.839	0.03	6.789	0.08	4.453	0.13
Traditional Familism	0.954	0.48	1.010	0.46	0.682	0.57
Optimism	11.875	0.04	2.133	0.27	5.369	0.10

* With only six countries (so, df=5) having data for all six values at all waves: Belgium, France and the Netherlands for the Conservative regime; Canada and the US for the Liberal regime; and Italy for the Latin-Southern regime.

According to our data analysis (Table 5.4.1), this hypothesis is not supported. F-statistics for four out of six values have decreased for two decades. If we look at the details, only in terms of religiosity and traditional ethical values have the Conservative regimes become more distinctive from the Liberal and the Latin-Southern regimes. This result

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partly supports our reasoning that the cultural context (measured by aggregated societal values in this research) must be quite independent of other powerful contextual factors including welfare regimes' institutionalised structural force (Section 2.4.1).

5.5 Chapter Concluding Remarks

We have reviewed six examples of societal values in this chapter in terms of three issues: change of societal values, relations between societal values and relations between societal values and welfare states. Obviously this review was mostly descriptive. Although examination of changing patterns of values over two decades is not what has often been done in empirical studies, it appears that 20 years is not sufficient to investigate cultural change and generalise a certain trend. It should be also noted that, as we discussed in the previous chapter, six societal values are merely some examples and our general review can be different if we have additional examples of societal values.

However, from our general review we could find that these values mostly appear to be compatible with the findings of the existing studies about cultural dimensions and with common knowledge: values have been fragmented and diversified; individualism and autonomy are becoming more and more emphasised; the influence of traditional values has been weakened; religiosity has declined but appears to have bottomed out in most industrialised countries; religiosity is not closely related to the type of faith (what the dominant religion is in a society); and the welfare regimes reflect these value differences to a certain degree and so on. This in some respects supports the robustness of our analysis and validity of our six examples of societal values. It is expected that the cultural context of each society can be compared partly through these six societal values, which would enable us to examine the causal effect of the cultural context on social policy making.

Before closing this review Chapter, we would like to note that there arose a few interesting questions which cannot be dealt with here within the limited space and

should be examined by future studies – for example, the need for explanation of the distinctive value-differences between societies, such as the very high levels of legal permissiveness in France and Belgium and the very low levels in Denmark and Japan, was not met here. Seemingly the rapid 'conservatisation' of Finnish society in the 1990s, which appears not to have happened elsewhere amongst the 22 OECD countries, may also need to be accounted for.

By finishing operationalisation of the societal values with six examples, we are now ready for the next step – empirical test of our hypotheses about the effect of culture on social policy at both the 'before' and 'after' stages of policy-making.

CHAPTER SIX:

THE EX-ANTE EFFECT OF CULTURE

6.1 Introduction

In this chapter, the effect of cultural context as a causal factor on social policy making (the ex-ante effect) is examined with empirical data. On the one hand, it was conceptualised that the societal values deeply embedded in society and stable over time would form the cultural context for social policy making (Chapter 2). Through the analysis of data on values (Chapter 4) on the other hand, we transformed six examples of societal values into measurable terms, which are expected to show, if aggregated, aspects of the cultural context of each society. Based on these, we attempt to predict the public opinions and welfare policy decisions with our variables of cultural values.

We need to narrow down the hypotheses we made (Section 2.6) with concrete dependent variables for the empirical analysis. Prior to this, our conceptualisation and hypotheses of the ex-ante effect of culture (Section 2.5 and 2.6) are briefly recapped. Then discussion about the public opinions and welfare policy decisions, which are expected to show more clearly the influence of the cultural context, will lead to the construction of more concrete hypotheses. In particular, we assume that public opinions and social policy decisions more closely linked to the answers to the basic welfare question of 'who should get what and why' will not only be central to welfare provision in general but also fruitful for our examination (Section 2.6.1). Our analysis should show that public opinion on welfare issues (or welfare attitudes) is quite dependent upon cultural values, and that the cultural context matters in welfare policy decisions. These results are presented following an introduction to the data and methods applied here. Finally, a discussion about the findings and their implications will close the chapter.

6.2 The Effect of Culture on Social Policy at the 'Before' Stage

In Chapter 2 (Section 2.5) we conceptualised the twofold effect of culture on social policy by drawing upon the literature (Alcock, 2001: 16; Cnaan et al, 1993: 124; Pfau-Effinger, 2005: 6; Stewart, 2006: 186; van Oorschot, 2006: 24; 2007: 134-135): values influence public opinions which set and limit policy options and policy agendas (the ex-ante effect as a causal factor); and values influence people's attitudes toward welfare policies, offering or withholding legitimating support for policies (the ex-post effect as the legitimacy base).

In the examination of the ex-ante effect of culture, there have been two hurdles: how to explore the direct causal link (van Oorschot, 2007: 135); and how to specify the particular cultural characteristics that have an impact on policy (Larsen, 2006: 18-19). Whilst these issues basically arise from the limited effect of culture as a contextual rather than immediate factor, we also attempted to deal with these by differentiation between situational, societal and universal values (Section 2.4).

When a cultural analysis looks at universal values, the cultural explanation becomes historical (abstract) and premised upon the cultural foundations of welfare, meaning that critics may ask for more empirical accounts with specific cultural characteristics. When a cultural analysis looks at situational values, the causal explanation is rarely satisfactory since these situational values reflect not only the cultural dimensions but also the interest dimension and (temporal) situations, and they are, as a result, not stable (situation-dependent). In addition, situational values are too closely linked to concrete issues. For example, when formulating a policy, policy makers do not just consider a certain public opinion (a situational value) on one particular issue but take public opinions on various relevant issues into consideration simultaneously (Section 2.5.1). If this is the case, public opinion on a particular issue rarely shows the causal impact clearly – it is hard to specify one situational value having an impact on policy.

Instead, by introducing the societal values, we conceptualise that more specified (than the universal values) but stable cultural dimensions influence social policy making by affecting public opinions (situational values) on various issues. According to this reasoning, the effect of cultural context (societal values) on each public opinion can be examined regardless of the instability of public opinion (as is the case with the study of determinants of welfare attitudes), and we can also explore the effect of cultural context on welfare policy making due to the stability of societal values. Drawing on this, we constructed two hypotheses for the ex-ante effect of culture (Section 2.6): the cultural context (aggregated societal values) affects public opinion on specific welfare issues; and the cultural context has an impact on policy decisions.

6.3 Public Opinions and Policy Decisions on 'Who should get What and Why'

We need to narrow down these hypotheses – whilst our targeted explanatory variables (the cultural context) are prepared now with the six societal values, the dependent variables (public opinions and policy decisions) are not specified yet. As discussed above (Section 2.6.1), we focus on the public opinions and policy decisions more closely related to the welfare moral question, 'who should get what and why'. This choice is based on two concerns: practicality and centrality. The public opinions and policy decisions more relevant to the welfare moral question will reveal more clearly the effect of the cultural dimensions. More important than this, welfare is fundamentally based on this question – welfare decisions are founded on the consensus about the answers to this (e.g. Marshall, 1972: 20; van Oorschot, 2000). In this respect, public perceptions and welfare decisions more closely linked to the crucial welfare question deserve more attention.

Our first object of public opinion is the public's view on the reason for poverty. It has been suggested that the public perception of the cause of poverty is related not only to the 'legitimacy of social and economic inequality' and general character of welfare states in terms of levels of social spending, generosity and so on – as an answer to the

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question of 'why', but also to types of concrete policies such as anti-poverty policy (Lepianka, van Oorschot & Gelissen, 2009: 421-422; van Oorschot & Halman, 2000: 2-3). Van Oorschot and Halman (2000: 4-10) find through their analysis as well as review of the literature that there are two dimensions (the individual/social dimension and blame/fate dimension) and, as a result, four types of explanations for poverty: individual blame (laziness and lack of will power); social blame (social injustice); individual fate (bad luck); and social fate (inevitable part of modern progress). According to van Oorschot and Halman, the 'social blaming' view developed quite quickly in the 15 years between 1976 and 1990, and is now dominant in the Western European societies - in 1976, more societies were dominated by the individual blaming view (van Oorschot & Halman, 2000: 10-16). They also report that these individual poverty perceptions are more influenced by cultural characteristics than socio-economic factors (ibid: 20).

Within these four types of poverty explanations, the individual blaming (or, victim blaming) view is more relevant to the variations in welfare in that this poverty perception is closely linked to seeing the needy as less deserving – this victim blaming view sees the poor as 'in control' of their neediness, which is one of the deservingness criteria (Larsen, 2006, Ch. 4 and 5; also see van Oorschot, 2000). This individualistic explanation of poverty emphasises the individual responsibility of people for their needs and is linked to less support for the legitimacy of welfare (van Oorschot, 2008: 274, 284-285). In another respect, it is also argued that contrasting this individual blaming view with the other three types of explanation (dichotomisation) is the clearest and the least problematic measurement of the poverty perception (Lepianka, van Oorschot & Gelissen, 2009: 423-431). Drawing on this discussion, we also attempt to measure the victim blaming poverty perceptions of the public.

The second object of public opinion is the public attitudes toward the unemployed. It has been reported that the European people are likely to be less concerned about the unemployed and immigrants, and to see these group as less deserving than the sick and disabled (van Oorschot, 2000, 2006; van Oorschot, Arts & Halman, 2005). This implies that welfare for the unemployed is likely to be a more socially debatable issue, and that

public opinion on welfare policy for the unemployed matters more.[85] Blekesaune and Quadagno (2003: 424) also assume that supporting welfare policies for the unemployed reflects ideological positions to a greater extent whilst supporting welfare policies for the sick and old is consistent with most people's self-interest. However, the cultural dimensions as determinants of these public attitudes have rarely been explored. Although Blekesaune and Quadagno (2003) contend that the level of public support for the unemployed is dependent on the egalitarian ideology, we have shown that the widely measured level of egalitarianism in a society is too unstable to claim a causal inference (Section 3.6.1). Instead, we expect that stable societal values will show the effect of the cultural context on public attitudes toward the unemployed.

Similarly, it is likely that the effect of cultural context on social policy decisions is found more clearly within policy decisions closely linked to the key moral question about welfare. For example, welfare decisions on welfare programme characteristics (welfare generosity) elicit more concern from the public than decisions on the level of general welfare (the level of total social expenditure). Although the latter would also reflect the socially agreed (decided) level of governmental intervention for the redistribution of wealth in general, the former – 'intended generosity' (Kenworthy & McCall, 2008: 40) - may offer a more enlarged picture of the socially agreed answer to the question of 'what' (in terms of 'who should get what and why') than the latter. If there is more concern amongst the public about welfare generosity than the level of total social expenditure, policy makers will take public opinions on these matters more seriously.

With the same reasoning, we assume that the decisions on allocation of welfare resources to various welfare target areas are closely linked to the question of 'who'. Of particular concern here is the allocation of the welfare budget on unemployment – as it was discussed above, if people tend to be more conditional about welfare for the unemployed, welfare spending on unemployment will be more dependent upon a social consensus whilst spending levels on other essential welfare target groups such as the old,

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[85] The public attitude to immigrants was not considered here, since the issue of welfare for immigrants was relatively new and had been asked about in surveys less frequently.

sick and disabled will be more determined by the level of need. At the same time, other welfare target areas such as health and family will be more relevant to the wider public than a specific group and raise the question of 'who' less seriously.

This conceptual consideration leads us to examine the effect of the cultural context on public opinions and welfare policy decisions with five concrete hypotheses: public opinion on the cause of poverty, public attitudes toward (the welfare policy for) the unemployed, the level of welfare effort in general, the welfare programme characteristics and the welfare budgetary allocation for unemployment will be dependent upon six aggregated societal values – that is, parts of the cultural context.

Our analyses for these hypotheses are framed by the argument that 'policy-makers act in an economic, political and cultural context' (van Oorschot, 2008: 268). In other words, it is assumed that if we are to explore the effect of cultural context we need to control the effect of the economic and political contexts. Indeed, there has been ample discussion about the influence of the economic and political contexts on policy and policy attitudes. For example, it has been suggested that there are likely to be more demands for welfare intervention in poorer societies given that as people become better-off they can and will take care of their own welfare (Borre, 1995: 377-8 in Gelissen, 2008: 249), and that public support for welfare policies tends to be lowered as higher levels of income equality and welfare standard are achieved (Gelissen, 2008: 250), which is partly supported by empirical test (Gelissen, 2008: 261).

In this analysis, however, the economic growth level is included instead of the level of economic affluence. Since we have already attempted to minimise the impact of different levels of material affluence in general by selecting the 22 most industrialised capitalistic countries (Section 3.5), we expect the 'condition' of the national economy will have a stronger impact on the public opinion than the 'status' of the national economy such as the level of GDP within these 'welfare states'. In addition, the level of GDP cannot be a good factor for welfare policy decisions in our analysis since our 'pooled' dataset covers a long period (two decades) not by every year but by 10-year

term – the level of GDP in every country in this research has increased substantially and 'linearly' for two decades (1981-2000) if we look at it periodically (with 10-year gap). We assume more positive public attitudes toward welfare where people enjoy a higher economic growth level – they can be more generous to the needy for they feel the welfare provision of government does not threaten their economic interests much. With the same reasoning, we expect that the victim blaming poverty perception will be weaker in societies with higher economic growth rates.

It has been argued that a high unemployment rate can lead to more positive public attitudes toward welfare policies with stronger empathy for the unemployed because of the high risk of becoming unemployed, more concern for the unemployed as the possibility of having unemployed friends or relatives increases and more political emphasis on unemployment as part of the national political agenda (Blekesaune & Quadagno, 2003: 418; Gelissen, 2008: 250) – this argument is empirically supported (Blekesaune & Quadagno, 2003: 421-423; Gelissen, 2008: 256-259). However, it is also reported that there can be a 'national burden effect' (van Oorschot, Arts & Halman, 2005: 49) – higher unemployment is linked to lower informal solidarity. In this, we do not assume any direction of the effect - our analysis will be a test for these contrasting effects.

As for the effect of the political context on policy, the 'parties-do-matter' thesis is considered here. The advocates of this thesis suggest that the party composition of governments is a major determinant of policy choices, for example, as Schmidt (1996) shows by an intensive review and analysis by himself. According to him, the literature has shown that the levels of welfare spending in different areas, economic policies and the levels of taxation and deficits are all dependent upon the partisan characteristics of government (Schmidt, 1996: 167-169), which is supported by his own empirical analysis revealing that the incumbent parties matter for the level of public expenditure (ibid: 175-177) – the leftist parties tend to lead to more public spending, higher taxation and lower deficits. This party composition is by no means exhaustive as a political factor. Various political institutions have been researched in terms of their constitutional structure,

voting system and the number and types of veto points (e.g. Birchfield & Crepaz, 1998). In this research, however, the institutional characteristics of each country do not appear to reveal the impact of political factors more clearly than the compositional features of the cabinet since they rarely change (these characteristics are less changeable than cabinet compositions). [86] In addition, we also need to minimise the number of independent variables because of the small number of cases, which will be discussed later (Section 6.4.7). With the party composition of government we assume that, as widely contended, a leftist government will spend more on welfare, provide more generous welfare and allocate a larger welfare budget for unemployment. As for public opinion, however, it is not easy to conjecture the effect of the party composition of government. It is assumed that a leftist government will encourage more positive public attitudes toward welfare, as one of the main actors offering and leading social agendas, issues and debates, which can 'mould' public opinion (Page, Shapiro & Dempsey, 1987; Whiteley, 1981: 461).

Meanwhile, we attempt to control the effect of the welfare regime, which has been widely researched as one of the most powerful institutional factors influencing welfare attitudes and welfare policy (e.g. Andreβ & Heien, 2001; Arts & Gelissen, 2001; Heinemann, 2007; Larsen, 2006; van Oorschot, Arts & Halman, 2005) since the idea was suggested in *The Three Worlds* by Esping-Andersen (1990). In some respects, inclusion of the regime variable in our analysis may lead to duplication of explanatory dimensions, since the welfare regimes will reflect the cultural characteristics of societies to a certain degree. However, welfare regimes are more heavily based on the structures and characteristics of welfare programme. We have already showed that the diversity of the cultural context across countries is not well explained by the welfare regime (Section 5.3 and 5.4). In this, it may be worth examining the impact of the cultural context with the presence of the welfare regime effect. From another point of view, this presents a challenge to the idea of a welfare regime effect – since welfare state characteristics tend

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[86] Since our analysis compares cultures not countries (treating a country at different time points as different cultures), rarely changing features of a country are not desirable, which may lead to the nation effect within the analysis of the pooled dataset causing some problems such as non-random error and heteroschedasticity.

to co-vary with other societal level variables, if other variables are not controlled, the welfare regime effect can easily be exaggerated (Gelissen, 2008: 250-251; van Oorschot, 2006: 28).

Within our analysis, the effect of cultural context as a whole is not 'explained' since it is impossible, unfortunately. If people's values function simultaneously as the source of perceptions and judgements, we need to identify all the different kinds of societal values – but, we do not know how many societal values there are. Especially, it is difficult to hypothesise the 'interactive' effects between values when we have only six examples of societal values. As a result, while we examine whether the cultural context influences public opinions and social policy decisions, the direction of the effect of the cultural context as a whole cannot be inferred from our analysis. The generalisation of the impact of each societal value is also limited in this respect – it might be very different if we had more examples of societal values.

6.4 Operationalisation, Data and Method

6.4.1 Public opinion on the cause of poverty (the individual blaming perception)

In the EVS-WVS data, which is the main dataset used in this research, the respondent is asked to choose one from four answers to why people live in need: '1) because they are unlucky; 2) because of laziness and lack of willpower; 3) because of injustice in our society; and 4) because it is an inevitable part of modern progress'.[87] The national percentage of respondents choosing 2) is calculated to obtain the level of the individual blaming view in a society.

6.4.2 Public attitudes toward support for the unemployed

The public attitudes toward support for the unemployed are measured drawing on Blekesaune and Quadagno (2003). They measure the attitudes toward the unemployed

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[87] The original question was 'Why are there people in this country who live in need?' Respondents were asked to make a first and second choice. Here, only the first choice was considered.

based on the ISSP 1996 data (Role of Government series 3). In this survey the respondent is asked to choose one from five categories – 'definitely should be', 'probably should be', 'probably should not be', 'definitely should not be', and 'can't choose' – about two questions: 'On the whole, do you think it should, or should not, be the government's responsibility to provide a job for everyone who wants one and to provide a decent standard of living for the unemployed?' With these two questions, they construct the index of (positive) attitudes toward the unemployed with values from 1 to 7 by summing – the 'can't choose' category is treated as missing data. In our analysis, we draw this index not only from the 1996 data but from all the ISSP Role of Government series at 1985, 1990 and 1996, in order to obtain country scores corresponding to three time points in our values data (1981/2, 1990 and 1999/2000) as closely as possible. The country means are used as the public attitudes toward support for the unemployed.

6.4.3 Welfare effort

As is common practice, we gauge the level of welfare effort of a society by the total social expenditure as the percentage of Gross Domestic Product (GDP). This is drawn from the OECD data on the total social expenditure encompassing public and mandatory private expenditure as a percentage of GDP.

6.4.4 Welfare generosity

The decommodification index constructed by Esping-Andersen (1990) is the most widely applied measure of welfare programme characteristics, but the recently introduced welfare benefit generosity index (Scruggs & Allan, 2006) is used here. There are three reasons for this. Firstly, the decommodification index has values at only one time point (and is hard to extend to another time point since we cannot access the same data source used in *The Three Worlds*), whilst the benefit generosity index has multiple time points. Secondly, as the revised version of the decommodification index, the generosity index based on publicly available data appears to be more accurate. It

attempts to reflect, like the decommodification index, almost all the key programme characteristics, such as income replacement rate, qualifying conditions and coverage rate and duration, of three major social insurance programmes: pension, unemployment and sick pay. Data is drawn from the Comparative Welfare Entitlement Dataset by Scruggs (2006, ver. 1.2).

6.4.5 Welfare policy priority – welfare budget allocation to the unemployed

Decisions on how much of the welfare budget should be allocated to particular areas, in which the cultural context is believed to play a certain role, show the welfare policy priorities shaping different welfare arrangements. The level of social expenditure on unemployment as a percentage of total social expenditure is calculated based on the OECD data.

6.4.6 Predictors (Independent variables)

As discussed above (Section 6.3), our independent variables in addition to cultural variables are those of economic and political factors and welfare regimes. As for the economic growth level, the annual percentage change in real GDP (per capita) is used. This data as well as the standardised measure of total unemployment rates are drawn from both the OECD Economic Outlook data and the 'Comparative Welfare Reform Dataset 1960-2001' (Kühner, 2007) which is also based on the authoritative sources (OECD and IMF data). For the party composition of government, the index of Cabinet Composition within the Comparative Political Data Set 1960-2005 by Armingeon and his colleagues (2008) which has a 5-point scale is used.[88]

We used four types of welfare states as the variable of welfare regime, as discussed above (Section 5.4). Drawing on Arts and Gelissen (2002) who intensively review existing welfare regime typologies, 19 out of the 22 object countries in this research can

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[88] These five scales are: 1) hegemony of right-wing (and centre) parties; 2) dominance of right-wing (and centre) parties; 3) balance of power between left and right; 4) dominance of social-democratic and other left parties; and 5) hegemony of social-democratic and other left parties.

be grouped into four regime types - Iceland, Japan and Switzerland are not clear in terms of regime types - as follows:

   1) Liberal: Australia, Canada, Ireland, UK and US;
   2) Conservative: Austria, Belgium, France, Germany, Luxembourg and the Netherlands;
   3) Social Democratic: Denmark, Finland, Norway and Sweden;
   4) Latin-Southern: Greece, Italy, Portugal and Spain.

These four regime types are transformed into four dichotomous variables and if included in analysis, the effect of each of three regimes is examined in comparison with the Liberal regime (the Liberal regime variable is used as the reference variable). In the prediction of welfare generosity, these regimes variables are not included since the welfare regime typology is heavily based on benefit generosity (programme characteristics, or the level of decommodification, in Esping-Andersen's term).

6.4.7 The small-N problem

The problem of the small number of cases (the so-called small-N problem) is familiar to many, if not most, students of comparative welfare studies. There are only 20 or so welfare states with histories of social welfare policies. In addition, most reliable and cross-sectional data on societal level factors in welfare are available for only three, or at most, four decades. The situation is worse in the comparative cultural analysis of welfare, because cross-sectional data on cultural dimensions cannot be obtained from official government reports like the Census but have to be culled from relatively recently designed international surveys, which are conducted periodically not annually. This is a serious methodological problem. For example, Blekesaune and Quadagno (2003: 417-418) point out that the examination of the relationship between institutional structure and welfare attitudes within only a small number of (say, two) countries is not convincing and a bit like comparing two individuals, of one wealthy and one poor.

Although our case is not as serious this, the number of cases in our analysis is less than 20 for each wave and only 53 even when all three waves are pooled, as discussed above

(see Section 3.5, Table 3.5.1). Clearly, this limits our analysis: not only in terms of interpreting results but also when it comes to applying statistical techniques. For example, the common criterion for sample size of regression modelling, which is probably the most popular technique in the comparative study of welfare, requires a larger number of cases (or larger ratio of the number of cases to the number of predictor variables).[89] It can be argued, however, that such conventional standards of sample sizes do not necessarily apply at the cultural (ecological) level analysis and when using mean scores of countries, since data at this level tend to show relatively higher internal consistencies and to be more reliable than individual level data – the aggregation process reduces random fluctuation (van de Vijver, van Hemert & Poortinga, 2008: 16, 420). In order to be cautious, we examine the correlations of our predictor variables with the dependent variable first, and construct the regression models in such a way as to limit the number of explanatory variables as far as possible.

6.4.8 Statistical Technique

The multiple Ordinary Least Squares (OLS) regression measure is applied here, which is probably the most popular and widely used statistical method in this field. Since regression techniques can be used even with predictor variables correlated with each other they are more attractive to students of social sciences dealing with the real world, where nothing is completely independent (Tabachnick & Fidell, 2007: 117-118). Regression modelling is conducted by the standard method (more technically, 'Enter' method) instead of sequential or statistical ('Stepwise') method, as our purpose is inspecting relationships rather than better prediction. As it is widely known, the standard regression assesses each explanatory variable's 'unique' contribution to the prediction based on all other explanatory variables – that is, it examines each predictor's unique effect 'under controlling' all other predictors' effects. The small number of cases of our analysis is also considered in this choice, since we cannot expect most results

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[89] The variance of a DV (dependent variable) may be better explained with more potential predictors (IVs). But, for this, the variance of the DV should have been captured sufficiently in the data, which means we need sufficient cases. If not, the explanatory power of each IV can often be exaggerated – we cannot include many IVs.

(regression coefficients) to meet the conventional standard of statistical significant level (e.g. see Kohler & Kreuter, 2005 especially, Ch. 8; Tabachnick & Fidell, 2007 especially Ch. 5).[90]

To produce a robust result, it is suggested that regression modelling should meet assumptions known as the Gauss-Markov regression assumptions (Berry, 1993: 11-12; Kohler & Kreuter, 2005: 199-217).[91] Since our data set is an unbalanced panel format (the number of cases for each country is not the same) - in other words, pooled cross-sectional data of multiple time points, these regression assumptions become more important. When data are obtained cross-culturally at multiple time points (like our analysis) and pooled - widely called the time series of cross sections (TSCS, hereinafter) design - it has been reported that regression assumptions can be more easily committed. This is because observations (so residuals too) over time tend to be autocorrelated, variances of observations (again, errors too) tend to differ across sections or times (heteroschedasticity), and by differing unit (nation/section) and period effects, residuals of one section/period can be correlated (non-independence of errors), and errors can be non-random (not normally distributed) across section, time or both (Hicks, 1994: 171-173; Podestà, 2002: 9-12).

Bearing in mind this concern, we examine the residual plots of each regression analysis. The (standardised) residual plots (by standardised predicted values of dependent variable) can offer a clue as to the presence of multivariate outliers and the commitment of the regression assumptions. In some cases, one or two outliers were found, but excluding these was not considered. In comparing societies at the aggregated level, it appears to be undesirable to exclude a case (country) if the society is showing an odd value in a certain respect. Probably, it is one of the very reasons why we are doing comparative study. Furthermore, our aim is finding a general trend rather than getting a better-fit

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[90] For this reason, it is recommended that the number of cases should be larger for statistical (stepwise) regression than standard regression (Tabachnick & Fidell, 2007: 123).

[91] These are: 1) quantitative or dichotomous IVs and quantitative, continuous and unbounded DV; 2) nonzero variance of all IVs; 3) no perfect multicollinearity; 4) the mean of residuals is zero; 5) no correlations between each IV and the residual; 6) homoscedasticity (of the variance of the residual); and 7) a lack of autocorrelation (between any two residuals). In addition to these, the normal distribution of residuals is assumed in the standard regression model (Berry, 1993).

model. In addition, of course, there is our concern for keeping the number of cases as large as possible. Roughly, there seemed to be no serious signs of violation of the regression assumptions in our examination of the residual plots. Most plots showed rather rectangle-shapes (except one or two seemingly outliers) implying little possibility of violation of, for example, the residual's normality, linearity and homoschedasticity. Although heteroschedasticity was suspected in some places, it was not so clear after excluding one or two outlier(s) – the small number of cases limited our diagnostics too.

It can be said that the autocorrelations are not a great concern here since there are only two time or three time periods in our analyses.[92] Even though the possibility of the presence of serious heteroschedasticity and autocorrelation appears to be low, however, extending our interpretation of the findings would be very limited without further verification. Recently, there has been much discussion and development in tackling these issues of TSCS data analysis, and is still on-going (e.g. see Hicks, 1994; Podestà, 2002; Sayrs, 1989). We do not discuss the details of these techniques, which would require far more space and also make the thesis much more statistically-oriented. Instead, let us briefly note that we examined all the results of the OLS measure in this chapter by using one of the TSCS data analysis techniques, the so-called 'random effect Generalised Least Squares estimation'.[93] In most cases, results by both measures were not so different in terms of signs and statistical significance levels of regression coefficients. These will be presented in the footnotes for each analysis (Section 6.5 and 6.6).

To predict public opinion (Section 6.5), we use the data for predictors of the same year with the year when the dependent variable (public opinion) is surveyed – it is assumed that public opinion will be more dependent upon short-term situations than long-term trends. However, in prediction of welfare policy decisions (Section 6.6), we use the

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[92] It has been claimed that the problem of autocorrelation will be minimal in an overwhelmingly cross-sectional dominant design with just a few time periods (Stimson, 1985 in Birchfield & Crepaz, 1998: 196).
[93] It is suggested that this method is more appropriate for 'spatially dominated' data like ours than the 'Parks-Kmenta' model, which is the most popularly used but better for 'serially dominated' data. Another suggested method, the 'Panel Corrected Standard Error (PCSE)' estimation is not available here, because there are too few time points – a lagged dependent variable cannot be generated for all analyses (see Hicks, 1994; Podestà, 2002). The random effect GLS estimation was conducted in a statistical software, STATA, by the command of 'xtreg DV IVs, re'.

averages of 9 years (from 8 years before to the year when each wave of 'values survey' is conducted, so, for example, from 1973 to 1981) for both dependent and independent variables. Policy decisions will not fluctuate wildly, especially year by year, but be path-dependent. If so, we may need to examine predictors' impact by longer period terms. In practice, data by corresponding years and by 9-year term average do not produce any big differences. However, the results obtained by this reasoning were slightly clearer and will be presented in the following sections.

6.5 Values and Public Opinion

6.5.1 Public opinion and Individual Blaming

The examination of the correlations between the level of the victim blaming view and assumed predictors (Table 6.5.1) shows that the individual blaming poverty perception tends to be stronger where more a rightist party holds the power, where there is stronger religiosity and traditional ethical values and where there is a lower level of tolerance. Rightist governments tend to emphasise individual responsibility for welfare and this appears, as hypothesised, to influence the public perception on the cause of poverty. Van Oorschot (2008: 284-285) predicts that neo-liberal and communitarian thinking about welfare, which emphasises individual responsibility, will become increasingly popular in Europe and that the victim blaming view will eventually lead to the transformation of European welfare states into US-style welfare states. Despite insignificant coefficients, the negative signs of coefficients for the economic growth level and the unemployment rate show that the public are more generous (solidaristic) when they enjoy a better economic situation, as hypothesised, and that the empathy effect on the public's individual blaming poverty perceptions is stronger than the burden effect (Section 6.3) of a higher unemployment rate.

People of stronger religiosity can be less eager for 'social' (and secular) solutions to problems existing in society. Although more religious people tend to be, individually,

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more solidaristic with needy people[94] regardless of their religious denomination (Arts, Halman & van Oorschot, 2003: 299), they may be less likely to think these problems are caused by social-structural flaws. This may be linked to, collectively, more emphasis on the individual dimension in explaining poverty. Traditional ethical values are often deeply concerned about the continuity of society and emphasise preserving the existing social order, sometimes even at the expense of individual rights and freedom of choice.[95] Possibly, this value is linked to the work-ethic and to viewing the poor as 'dropouts' potentially harmful to the existing social order. Tolerance is, as it has been widely discussed in other disciplines, the basis of solidarity and cooperation between people and of social cohesion. In relation to welfare, it is rather easily conjectured that people in need would be less differentiated and less blamed in a more tolerant society.

Table 6.5.1 Pearson correlations of economic, political and cultural contexts with victim blaming poverty perceptions (aggregate level, correlations between national averages)

	The victim blaming view of poverty[a]	N
Economic Context		
Economic Growth Level[b]	-.123	33
Unemployment Rate[c]	-.147	33
Political Context		
Index of Cabinet Composition[d]	**-.337***	29
Cultural Context		
Religiosity	**.576***	34
Traditional Ethical Values	**.591***	33
Legal Permissiveness	-.226	29
Tolerance	**-.517***	34
Traditional Family Values	.270	34
Optimism	-.189	33

Significant at *** the 0.01 level; ** the 0.05 level; * the 0.1 level.
[a] Source: EVS-WVS 1990, 1999/2000.
[b] Real GDP percentage change from previous year, at 1990 and 1999. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] At 1990 and 1999. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] At 1990 and 1999. Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).

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[94] For example, van Oorschot (2006) assumes a positive association between religiosity (or, religiousness) and solidarity drawing upon several authors. However, this is only partly supported by his analysis at the individual level (also see van Oorschot, 2008: 274, 283).
[95] In this, the correlation at both the individual and culture level between traditional ethical values and traditional family values (which implies the subordination of individual interests to family's interests) can be partly explained.

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We then attempted to predict the level of the victim blaming poverty perception with the variables of economic and political context and with only the three cultural variables showing significant correlations in order to minimise the number of predictors (Table 6.5.2). Although regression with a small number of cases is far from desirable, it is not something that 'must-not-be-tried' under any circumstances; indeed, it is argued (see Section 6.4.7) that fewer cases than the conventional criterion of sample sizes can be acceptable in cultural level analysis using country means (van de Vijver, van Hemert & Poortinga, 2008: 16, 420). Neither is it hard to find examples in the literature of regression with only a few cases (e.g. Birchfield & Crepaz, 1998; Larsen, 2006: Ch. 5).

Table 6.5.2 Prediction of the victim blaming poverty perception of the public[a] with the economic, political and cultural contexts[96]

Model	1	2	3	4	5
Economic Context					
Economic Growth Level[b]	-.301	**-.362****	**-.369****	**-.311***	**-.379*****
Unemployment Rate[c]	.006	**-.304***	-.180	.036	-.268
Political Context					
Index of Cabinet Composition[d]	**-.457****	-.107	-.085	**-.298***	.023
Cultural Context					
Religiosity		**.709*****			**.425****
Traditional Ethical Values			**.666*****		**.361***
Tolerance				**-.497*****	-.215
Adjusted R^2	0.15	0.47	0.44	0.37	0.58
N[e]	28	28	28	28	28

Beta coefficients by OLS measure; *** significant at 0.01 level; ** significant at 0.05 level; * significant at the 0.1 level.
[a] Source: EVS-WVS 1990, 1999/2000.
[b] Real GDP percentage change from previous year, at 1990 and 1999. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] At 1990 and 1999. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] At 1990 and 1999. Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).
[e] Austria 90 99; Belgium 90 99; Canada 90, Denmark 99; Finland 90 00; France 90 99; Germany 90 99; Greece 99; Ireland 90 99; Italy 90; Japan 90; Netherlands 90 99; Norway 90; Portugal 90; Spain 90 99; Sweden 90 99; UK 90 99; and the US 90.

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[96] The random-effect GLS estimation also showed very similar results. The r-square value was increased from 0.04 for model 1 to 0.38 ~ 0.52 for model 2 ~ 5. The economic growth rate invariably showed a significant but negative coefficient. Coefficients for the unemployment rate were invariably negative but significant only in model 2, 3 and 5. The signs of coefficients for the cabinet composition were not stable and coefficients were mostly insignificant. Unlike the result of OLS measure, tolerance showed a positive coefficient in model 5, but it was negative in model 4. This would be caused by the interaction effect between cultural values - if we included more societal values then the signs of coefficients for each value might be different. However, it could still be suggested that the relationship between the level of tolerance and the level of the victim blaming poverty perception is negative. On the whole, the result by the random-effect GLS measure echoed the result by the OLS measure in Table 6.5.2.

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Most of all, it is striking to see in Table 6.5.2 that the explanatory power of the model is greatly improved by adding cultural variables – although it is somewhat predictable with strong correlations of cultural variables with the individual blaming poverty perception in Table 6.5.1. Whilst the model with the variables of economic and political context only explains 15 percent of the variance of the aggregated level of victim blaming poverty perception, variables of the cultural context double or triple this (37~58 percent). Public opinion on the causes of poverty appears to be rather strongly dependent upon cultural values (the cultural context). As it was seen in the examination of the correlations, the level of religiosity and traditional ethical values is positively, and the level of tolerance negatively related to the level of the victim blaming poverty perception of the public. Our models show that the level of religiosity and traditional ethical values are particularly relevant to the individual blaming poverty perception.

Interestingly, if the difference in the cultural context is controlled, the effect of the economic context tends to be clearer whilst the effect of the political context tends to become blurred. That is, public concern about the economic situation and their empathy with the unemployed appear to be rather universal regardless of the value differences across societies. As hypothesised, societies enjoying larger economic growth rates at the moment are less likely to blame individuals for being in need. This implies that, even within relatively affluent societies, the enhancement of anti-poverty policy will be supported by the public when there is a better economic situation. As for the unemployment rate, an 'empathy' effect rather than the 'burden' effect was found - the public is less likely to blame individuals for poverty when there are more unemployed. Our data suggest that the impact of the party composition of government on public opinion is relatively weaker than the effect of cultural values – especially, within societies of the same level of religiosity and traditional ethical values, where party composition rarely seems to figure in the public's poverty conceptions.

As we discussed above (Section 6.3), the same prediction was then conducted with the welfare regime variables (Table 6.5.3). Our result corroborates van Oorschot and Halman's finding (2000) that there is no regime effect on the public perception of the

cause of poverty. Although it seems that the different institutional arrangements of welfare partly explain the differences between public perceptions of the cause of poverty in the Liberal and the Social Democratic regimes (in model 1), this impact of the regimes becomes vague when the value-difference of the two regimes is considered. It is also a counter-finding against the institutional account for the perceived causes of poverty (e.g. Larsen, 2006: Ch. 5).

Table 6.5.3 Prediction of the victim blaming poverty perception of the public[a] with the welfare regimes and the cultural values[97]

Model	1	2	3	4	5
Welfare Regime (reference to Liberal)					
Conservative	-.338	.169	-.079	-.169	.258
Social Democratic	**-.544****	-.054	-.213	-.388	.064
Latin Southern	-.050	-.005	-.025	-.042	.000
Cultural Factor					
Religiosity		**.702*****			**.546***
Traditional Ethical Values			**.466****		.207
Tolerance				-.276	-.142
Adjusted R^2	0.16	0.37	0.26	0.18	0.35
N^b	30	30	30	30	30

Beta coefficient by OLS measrue; *** significant at 0.01 level; ** significant at 0.05 level; * significant at the 0.1 level.
[a] Source: EVS-WVS 1990, 1999/2000.
[b] Austria 90 99; Belgium 90 99; Canada 90, Denmark 99; Finland 90 00; France 90 99; Germany 90 99; Greece 99; Ireland 90 99; Italy 90 99; Luxembourg 99; Netherlands 90 99; Norway 90; Portugal 90 99; Spain 90 99; Sweden 90 99; UK 90 99; and the US 90.

6.5.2 Public attitudes toward support for the unemployed

The examination of the correlations (Table 6.5.4) tells us that the public attitudes toward support for the unemployed are likely to be more positive in societies where there is a high unemployment rate, high level of tolerance, traditional family values, weak religiosity and optimism. Here again, the empathy effect of higher unemployment appears to offset the burden effect.

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[97] In analyses by the random-effect GLS estimation, the r-square value also increased from 0.24 for model 1 to 0.42 for model 5. Within regime variables, only the Social Democratic regime showed a significant (negative) impact in model 1 and 4, but this faded away in model 5. Not only religiosity but also traditional ethical values showed significant (positive) coefficients in model 5. On the whole, the results by both the random-effect GLS measure and the OLS measure were very similar.

Table 6.5.4 Pearson correlations of the economic, political and cultural contexts with the public attitudes toward support for the unemployed

	Public attitudes toward the unemployed[a]	N
Economic Context		
Economic Growth Level[b]	.162	26
Unemployment Rate[c]	**.397****	26
Political Context		
Index of Cabinet Composition[d]	.052	26
Cultural Context[e]		
Religiosity	**-.427***	19
Traditional Ethical Values	-.034	20
Legal Permissiveness	.092	17
Tolerance	**.792*****	19
Traditional Family Values	**.402***	19
Optimism	**-.483****	19

Significant at *** the 0.01 level; ** the 0.05 level; * the 0.1 level.
[a] Source: ISSP 1985, 1990 and 1996 (the role of Government series).
[b] Real GDP percentage change from previous year, at 1985, 1990 and 1996. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] At 1985, 1990 and 1996. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] At 1985, 1990 and 1996. Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).
[e] At 1981/2, 1990 and 1999/2000.

Given that religiosity emphasises the individual dimension in poverty perceptions, it is to be expected that the more religious public may be less favourable toward policies (collective approaches) supporting the unemployed. The negative correlation of the level of optimism can be understood with a similar reasoning – the optimists may emphasise individual autonomy and individual (capability of taking) responsibility (for their own welfare needs). Tolerance would be linked to the less stringent conditions placed on informal solidarity (solidaristic attitudes) since this value can help people widen their 'shared identity' which is the basis for social solidarity (Arts & Gelissen, 2001: 285). Meanwhile, it is not easy to find a plausible explanation for the positive relationship between the level of traditional family values and public attitudes toward support for the unemployed. Perhaps, the public with stronger traditional family values is more likely to see the issue of unemployment as a matter for the male-breadwinner and as a threat to the families.

Table 6.5.5 Prediction of the public attitudes toward support for the unemployed[a] with the economic, political and cultural contexts[98]

Model	1	2	3	4	5
Economic Context					
Economic Growth Level[b]	-.046	.220	.154	.086	.171
Unemployment Rate[c]	**.458***	**.393***	.089	.311	.335
Political Context					
Index of Cabinet Composition[d]	.266	.148	.011	.286	.245
Cultural Context					
Religiosity		**-.574****			
Tolerance			**.766*****		
Traditional Family Values				.404	
Optimism					**-.538****
Adjusted R^2	0.16	0.42	0.56	0.27	0.41
N[e]	17	17	17	17	17

Beta coefficients by OLS; *** significant at the 0.01 level; ** significant at the 0.05 level; * significant at the 0.1 level.
[a] Source: ISSP 1985, 1990 and 1996.
[b] Real GDP percentage change from previous year, at 1985, 1990 and 1996. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] At 1985, 1990 and 1996. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] At 1985, 1990 and 1996. Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).
[e] By matching the EVS-WVS wave 1 (1981/2) for data of 1985, wave 2 (1990) for data of 1990 and wave 3 (1999/2000) for data of 1996: Canada 96; France 96; Germany 90 96; Ireland 90 96; Italy 85 90 96; Norway 90; Spain 96; Sweden 96; UK 85 90; and the US 85 90 96.

In the prediction of the public attitudes toward support for the unemployed (Table 6.5.5), we again find that cultural variables can greatly contribute to the explanation (with a big jump in values of the adjusted r-square from 0.16 to, at maximum, 0.56).[99] Whilst our hypothetical assumptions are generally supported by the signs of the coefficients – the public under a better economic situation, higher unemployment rate and more leftist government is slightly more likely to be positive toward support for the unemployed although, interestingly, the 'empathy effect' of the higher unemployment rate fades away when the level of tolerance is controlled (model 3) - the higher unemployment rate hardly contributes to the more positive attitudes toward the unemployed. If we look back on model 4 in Table 6.5.2 above where the higher unemployment rate does not show a meaningful contribution to the prediction with inclusion of tolerance, the 'empathy effect' which has been assumed in the literature appears to be mostly dependent upon

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[98] By the random-effect GLS estimation, the r-square value varied from 0.14 (model 1) through 0.41 (model 4) to 0.65 (model 3). Significant coefficients were found only for tolerance (positive), religiosity and optimism (both negative).
[99] We do not produce the model with all input variables since the number of cases is very small and the prediction would not be so reliable.

people's values – for example, tolerance. Thus, within societies with lower levels of tolerance, it is probable that the higher unemployment rate causes a burden effect instead of the empathy effect.

Table 6.5.6 Prediction of the public attitudes toward support for the unemployed[a] with the welfare regimes and the cultural values[100]

Model	1	2	3	4	5
Welfare Regime (reference to Liberal)					
Conservative	.390	-.030	-.006	.311	.269
Social Democratic	**.423***	.039	-.126	**.432***	.402
Latin Southern	**.614****	**.531****	**.336***	.501	.390
Cultural Factor					
Religiosity		**-.608***			
Tolerance			**.835****		
Traditional Family Values				.130	
Optimism					-.246
Adjusted R^2	0.29	0.40	0.70	0.23	0.25
N[b]	17	17	17	17	17

All values are Beta coefficient; ** significant at 0.01 level; * significant at 0.05 level.
[a] Source: ISSP 1985, 1990 and 1996.
[b] By matching the EVS-WVS wave 1 (1981/2) for data of 1985, wave 2 (1990) for data of 1990 and wave 3 (1999/2000) for data of 1996: Canada 96; France 96; Germany 90 96; Ireland 90 96; Italy 85 90 96; Norway 90; Spain 96; Sweden 96; UK 85 90; and the US 85 90 96.

The same prediction but with the welfare regime variables (Table 6.5.6) shows again, like the results of the prediction of the public opinion on the cause of poverty (Section 6.5.1), that the different institutional arrangements of welfare (welfare regimes) are not a critical determinant of welfare attitudes (public attitudes to welfare issues). When cultural values which are distinctively different between the Liberal and the Social Democratic welfare regimes such as religiosity and tolerance (see Section 5.4) are controlled, the contribution made by the Social Democratic regime variable is swept away (model 2 and 3). The exact same things happen for the Latin-Southern regime variable when controlling levels of traditional family values and optimism. If the cultural

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[100] By the random-effect GLS estimation the r-square values were 0.42, 0.53, 0.71, 0.42 and 0.43 in each model respectively. The Latin-Southern regime variable showed a significant coefficient (positive) in all models except model 5. The Social Democratic regime variable showed a significant coefficient (positive) only in model 1. Signs of coefficients for societal values were the same with the results by OLS, but only those for tolerance and optimism were significant.

context is considered, the welfare regime effect on welfare attitudes appears to be seriously challenged in our data analysis.

On the whole, cultural values appear to matter in the public opinions on welfare issues as hypothesised – we examined this especially through the public opinions relevant to the answers for the question of 'why' and 'who' out of 'who should get what and why'. In particular, our data suggest that the levels of religiosity and traditional ethical values are closely related to the victim blaming poverty perception of the public, as is tolerance to the public attitudes toward support for the unemployed. Meanwhile, differing welfare regimes appear not to be significant when predicting the public opinions on welfare, in contrast to the findings in some existing studies.

6.6 Values and Welfare Policy

In this section, the effect of cultural context on welfare policy is examined. Although the numbers of cases in analyses of this section are larger than those in the previous section, there still is concern about the 'small N'. However, according to our conceptual reasoning - the impact of the cultural values on social policy making would be realised through the public opinions on 'various' relevant issues, we are not selective about the six societal values but include all of them. In other words, if the influence of the cultural context on policy decisions is indirect, we cannot choose some variables of cultural values based on their correlations with a certain policy decision – it is assumed that there are mediators (public opinions) in those correlations. In this respect, our results cannot be exhaustive. If we have more societal values, the results would probably be different – for example, the contribution by cultural values can be lowered through additional mediators (public opinions) cancelling out the existing contribution. However, our aim is to examine whether the cultural context has an influence on welfare policy, not to inspect exactly how much the cultural context contributes to prediction, and our analysis works for this.

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As with the other predictors, it is assumed that regime variables will be more crucial in predicting welfare policies than in explaining public opinions, for policy decisions will be strongly affected by institutional factors as has been widely suggested. We assume that all the economic indices – both the economic growth level and total unemployment rate – will be positively related to welfare decisions examined here generally. A society enjoying a higher economic growth level may be more able to meet welfare needs. The more unemployed there are, the larger the welfare effort that would be required. As is commonly suggested, it is also assumed that a left-wing government will be more concerned with welfare than a right-wing government.

6.6.1 Total Social Expenditure

The factors for the level of welfare effort are examined through prediction of the total amount of social expenditure (Table 6.6.1). Somewhat expectedly (Section 6.3), the contribution by the cultural variables is marginal - the prediction is improved only slightly (0.04 percentage point in adjusted r-square value) by adding cultural variables. The decision of how much a society should spend on social welfare appears to be mostly circumscribed by the institutional settings and economic situations (model 2). The level of social expenditure as a percentage of GDP tends to be higher in societies where there are more unemployed people. In addition, the Social Democratic and the Conservative regime countries are likely to spend more on social welfare than the Liberal regime countries.

The negative relationship of the economic growth rate with the level of social expenditure is contrary to our expectations. Given that our subject countries are the most advanced capitalistic democracies with the highest levels of social expenditure, our assumption was wrong - we should have considered that the level of social spending cannot be increased proportionally to the increase of GDP. In other words, the positive relationship of the economic growth rate (change in GDP) with the level of social expenditure as a percentage of GDP is possible only when the latter increases at a higher rate than the former, which is rarely possible within countries already spending a fair

proportion of GDP on social welfare. In this, the negative coefficient for this variable merely shows the arithmetic effect, at least, within these welfare states.

Table 6.6.1 Prediction of the level of welfare effort[a] with the national characteristics of economy, politics, welfare regime and culture[101]

Model	1	2	3
Economic Context			
Economic Growth Level[b]	**-.278***	**-.220****	**-.187****
Unemployment Rate[c]	-.002	**.288*****	**.289****
Political Context			
Index of Cabinet Composition[d]	**.357****	.012	-.030
Welfare Regime (reference to Liberal)			
Conservative		**.887*****	**.946*****
Social Democratic		**.779*****	**.699*****
Latin Southern		.114	.243
Cultural Context			
Religiosity			-.035
Traditional Ethical Values			-.150
Legal Permissiveness			**-.259****
Tolerance			-.008
Traditional Family Values			.122
Optimism			.146
Adjusted R^2	0.15	0.71	0.75
N[e]	38	38	38

Beta coefficients by OLS measure; *** significant at the 0.01 level; ** at the 0.05 level; * at the 0.1 level.
All values for DV and IVs were the means of 1973-1981, 1982-1990, and 1991-1999.
[a] Total social expenditure by public & mandatory private as % of GDP. Source: OECD.
[b] Annual percentage change of real GDP. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] Source: OECD, Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).
[e] Austria 90 99, Belgium 81 90 99, Canada 82 90 00, Denmark 81 99, Finland 90 00, France 81 90 99, Germany 90 99, Greece 99, Ireland 81 90, Italy 81 90 99, Netherlands 81 90 99, Norway 82 90, Portugal 90, Spain 81 90, Sweden 82 90, UK 81 90, and US 82 90 99.

Within the cultural variables, legal permissiveness only shows a significant (negative) coefficient in prediction of the level of welfare effort. Regardless of what the

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[101] The random effect GLS estimation produced very similar results. The r-square value changed from 0.001 through 0.74 to 0.80. Throughout three models, the economic growth level (negative) and the unemployment rate (positive) showed significant coefficients. The Conservative and the Social Democratic regime variables showed significant coefficients (positive) in model 2 and 3. In model 3, only legal permissiveness showed a significant (negative) coefficient.

background of different levels of legal permissiveness across societies is,[102] a society with the public highly permissive to laws may tend to face stronger resistance to certain policies and regulations. For example, people will not be willing to accept taxes and benefits over a certain level given that transparency and fairness cannot be expected – they are more likely to think that others would cheat by not paying taxes or when claiming benefits. In this, the legal permissiveness may have a negative impact on the level of social expenditure.

6.6.2 Welfare Generosity

While deciding the portion of GDP assigned to welfare (social expenditure) is linked to ideas about welfare in general, the decision on the level of welfare generosity brings us closer to the answer to the more detailed welfare question of 'who should get what and why', especially the 'what'. The decisions on the latter invite more 'value-laden' debates and more diverse conclusions - this is the reason why we expect the analysis of the level of welfare generosity to show the effect of the cultural values more clearly.

The level of welfare generosity is predicted by the same regression technique (Table 6.6.2). Yet welfare regime variables are not included since our dependent variable is drawn from the 'generosity index' (Scruggs, 2006), the refined and replicated version of Esping-Andersen's (1990) decommodification index on which the regime typologies are heavily based.

By adding variables of cultural values, the explanatory power of the model is improved from 0.33 to 0.67 in terms of the adjusted r-square value (we can explain the variance of the level of welfare generosity about 30% better due to cultural variables). Within values, religiosity and tolerance appear to be more relevant to the level of welfare generosity. We saw above (Section 6.5) that more the religious society is less likely to favour institutionalised solidarity, whilst religious people tend to be, individually (or

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[102] We discussed above (section 4.5) that different levels of legal permissiveness could reflect not only legal trustworthiness but also complex historical and cultural aspects including how much people respect their legal system.

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informally), more solidaristic. This appears to be echoed here again. Tolerance would be a positive factor for almost all welfare issues and policies including the level of welfare programme generosity, as it has been supported in our analyses of public opinion and policy decisions.

Table 6.6.2 Prediction of the level of welfare generosity[a] with the economic, political and cultural contexts[103]

Model	1	2
Economic Context		
Economic Growth Level[b]	-.140	.050
Unemployment Rate[c]	-.016	.009
Political Context		
Index of Cabinet Composition[d]	**.569*****	.191
Cultural Context		
Religiosity		**-.311***
Traditional Ethical Values		-.202
Legal Permissiveness		.076
Tolerance		**.318****
Traditional Family Values		-.152
Optimism		.181
Adjusted R^2	0.33	0.67
N[e]	36	36

Beta coefficients by OLS measure; ** significant at 0.01 level; * at 0.05 level; * at 0.10 level.
All values for DV and IVs are the means of 1973-1981, 1982-1990, and 1991-1999.
[a] Source: Overall generosity score in Comparative Welfare Entitlement Dataset (Scruggs, 2006, ver. 1.2).
[b] Annual percentage change of real GDP. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] Source: OECD, Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).
[e] Austria 90 99, Belgium 81 90 99, Canada 82 90 00, Denmark 81 99, Finland 90 00, France 81 90 99, Germany 90 99, Ireland 81 90, Italy 81 90 99, Japan 90 00, Netherlands 81 90 99, Norway 82 90, Sweden 82 90, UK 81 90, and US 82 90 99.

It is suggested by our data that the leftist government is likely to offer more generous welfare, as hypothesised, although the impact of the cabinet composition is much weakened by controlling the cultural context. In the meantime, the economic context rarely presents its impact on the level of welfare programme generosity – welfare decision about 'what'.

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[103] By the random effect GLS estimation, the r-square value changed from 0.38 to 0.61. Significant coefficients were found for the unemployment rate in both models (positive), religiosity (negative), tolerance (positive) and optimism (positive).

6.6.3 Welfare Policy Priority

Another example expected to invite much value related social debate is welfare policy priority. Given that welfare budget is limited its distribution should reflect the order of welfare policy priority. As discussed above (Section 6.3), this priority is linked closely to the answer to 'who' within the welfare question of 'who should get what and why', and different orders of welfare policy priority shape differing welfare arrangements. In particular, the portion of the total welfare budget allocated to unemployment is our concern here for the same reason that we examined public attitudes toward support for the unemployed: it has been suggested that (the European) people see the unemployed as less deserving, and their informal solidarity is more conditional with the unemployed than with the old and sick (van Oorschot, 2000; 2006). That is, how much of the welfare budget should be spent on the unemployment is more of a moral and political decision. The level of social expenditure on the unemployment as a percentage of total social expenditure is predicted (Table 6.6.3).

Above all, it is suggested (understandably) that the total unemployment rate is the driving force behind the allocation of a greater portion of the welfare budget to unemployment. When and where there are more unemployed people, welfare demands by the unemployed increase and become a more crucial to the social and political agenda, which leads to more spending on unemployment policies.

As we assumed, the prediction is greatly improved by adding cultural values in this analysis, compared to the prediction of the general welfare effort (Section 6.6.1). Policy decisions more closely relevant to the basic welfare question of 'who should get what and why' appear to be more dependent upon the cultural context. More of the welfare budget is likely to be allocated to unemployment where optimism is more strongly embedded. This does not mean that a more optimistic society tends to give more support to the unemployed. We saw above (Section 6.5.2) that the level of optimism is negatively related to public attitudes toward the unemployed, which was understood as showing the emphasis of individual autonomy and responsibility associated with

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optimism. The result here suggests, therefore, that unemployment will be favoured over other welfare areas on which welfare budget could be spent in societies with stronger optimism, if a total sum is given and must be distributed – more allocation on 'this' means less for 'that'. Perhaps, the optimistic society prefers spending on 'potentially responsible individuals' to spending on areas more of collectivist by nature. Meanwhile, the level of tolerance appears to be relevant to more signifying unemployment within welfare issues. As we have often found in the analyses of this chapter, it is strongly suggested that tolerance is one of the key values in welfare.

Table 6.6.3 Prediction of the portion of social expenditure spent on the unemployment[a] with the national characteristics of economy, politics, welfare regime and culture[104]

Model	1	2	3
Economic Context			
Economic Growth Level[b]	-.139	-.104	-.060
Unemployment Rate[c]	**.498***	**.647***	**.577***
Political Context			
Index of Cabinet Composition[d]	.079	.006	-.166
Welfare Regime (reference to Liberal)			
Conservative		.062	-.024
Social Democratic		.229	-.165
Latin Southern		-.235	**.534***
Cultural Context			
Religiosity			.119
Traditional Ethical Values			-.087
Legal Permissiveness			.082
Tolerance			**.799***
Traditional Family Values			-.302
Optimism			**.604****
Adjusted R^2	0.17	0.21	0.49
N[e]	37	37	37

Beta coefficients by OLS measure; ** significant at 0.01 level; * significant at 0.05 level.
All values for DV and IVs are the means of 1973-1981, 1982-1990, and 1991-1999.
[a] As the percentage of total social expenditure. Own calculation based on OECD data.
[b] Annual percentage change of real GDP. Source: OECD and Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[c] Source: OECD, Comparative Welfare Reform Dataset 1960-2001 (Kühner, 2007).
[d] Source: Comparative Political Data Set 1960-2005 (Armingeon et al, 2008).
[e] Austria 90 99, Belgium 81 90 99, Canada 82 90 00, Denmark 81 99, Finland 90 00, France 81 90 99, Germany 90 99, Greece 99, Ireland 90, Italy 81 90 99, Netherlands 81 90 99, Norway 82 90, Portugal 90, Spain 81 90, Sweden 82 90, UK 81 90, and US 82 90 99.

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[104] By the random effect GLS measure, the r-square value changed from 0.22 through 0.27 to 0.59. As with the result by OLS, the unemployment rate is the most powerful factor influencing the allocation of more of the welfare budget on unemployment. The level of economic growth showed coefficients invariably negative (but not significant). The government index hardly contributed to the prediction. There were no significant coefficients for the welfare regime variables. Within societal values, tolerance only presented a significant (positive) coefficient.

According to our data, the economic growth level does not lead to support for more spending on unemployment. This reflects the fact that welfare for the unemployed is not a widely agreed matter of 'as long as possible' but an issue causing tension between different opinions (and thus more conditional). If the unemployment rate is the same (controlled), it appears that the level of welfare expenditure on the unemployed does not often increase, even when a higher economic growth is celebrated. Interestingly, within our data, right-wing governments are likely to allocate more to unemployment although the result is not statistically significant. It can be conjectured that whilst the total welfare budget tends to be smaller under a rightist government, expenditure on unemployment is harder to cut (for example, because of strong trade unions in some countries) – our result is not telling us that a rightist government is likely to 'spend more' on unemployment.

Whilst it is suggested within our data that supporting the unemployed is likely to be more of a priority in the Latin-Southern welfare states than in the Liberal welfare states, this appears to be caused by Spain where the unemployment rate over 10 % has been rather 'institutionalised' since 1980 exceptionally within the 22 OECD countries. Yet to this explanation there can be a counterargument – the unemployment rate is controlled (included) in our analysis. Instead, a possible account for this can be found within the study of family policy. It is reported that countries where families are emphasised (nations of families) are more likely to support a breadwinner-father, homemaker-mother and dependent children whilst 'nations of individuals' tend to be more concerned about women's and children's (individual) rights, to work and to decent living and education standards respectively (Chesnais, 1996 in Brewster & Rindfuss, 2000: 284). It is also found that in such 'nations of families' the breadwinner-fathers are supported by stronger employment protection legislation and higher unemployment benefits (Boeri, Börsch-Supan & Tabellini, 2001: 12). The tendency found in this analysis for the Latin-Southern and the Conservative regime countries to allocate a larger portion of the welfare budget to unemployment than the Liberal regime countries - when the effects of other factors are controlled - may partly reflect this.[105]

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[105] Conversely, although it was not presented, our prediction of the allocation of welfare budget on family showed negative coefficients for the Conservative and Latin-Southern regime variables – nations of

6.7 Chapter Concluding Remarks

The ex-ante causal effect of culture on social policy was examined through empirical data analysis in this chapter. We found that cultural values were meaningful predictors for public opinions on welfare, for example, their poverty perception and attitudes toward the unemployed. We also saw how the cultural context influenced welfare policy decisions such as the level of welfare programme generosity and the allocation of the welfare budget. The 'culture-does-matter' thesis appears to be strongly supported here. Whilst cultural analysts of social policy have successfully conceptualised the (rather intuitive) idea of 'culture-does-matter', there has been a relative lack of empirical evidence for this. We attempted to reason the process of precisely how culture affects policy as a causal factor in a more detailed and transparent way by differentiating between the universal, societal and situational values (Chapter 2), and showed some empirical findings here supporting our hypotheses based on this reasoning.

Our analysis is, of course, not free from limitations. As it was pointed out above (Section 6.4.7) the small number of cases is a serious limitation throughout all the analyses in this chapter. In spite of our attempts to get robust results – by limiting the number of predictor variables, looking at the 'adjusted' r-square value and the sensitivity analysis using a TSCS analysis method – it is still probable that the explanatory power of the models is inflated to a certain degree. However, we are able to say without exaggeration, at least, that the cultural context is found empirically to be a determinant of public opinions and welfare policy decisions. It is expected that the increasing cultural data would facilitate cultural analysis of welfare more and more. The fact that our examples of societal values are not exhaustive has already been discussed in the previous chapters (Chapter 4 and 5). In this, the impact of each societal value on public opinion and policy decisions in reality might well be different from our results – there could be an interaction effect and cancelling out effect between our six examples and other societal values, if there are any. Given this, we should admit that our findings are

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families tend to allocate a smaller portion of the welfare budget to family (policy) than the Liberal regime countries.

vulnerable, with the probable exception of the finding that culture matters. Although this is not a problem exclusive to the study of cultural context – any analysis cannot include all the relevant factors - the cultural analysis of welfare based on the conception of societal values requires further development in terms of both quantity and quality.

Interpretations and implications of the same finding can be very different, for example, according to the epistemological stance as discussed above (Chapter 3). Our data analysis shows that the level of religiosity in a society is particularly relevant to the proportion of people blaming individuals for being in need (Section 6.5.1). Does this imply that we should try to be more secularised if we want our policies to better protect the poor? Such an argument appears to share the same logic as the 'cultural developmentalists' who claim that we need to cultivate a pro-economic development culture in certain societies (see Section 3.1). From our point of view (the cultural pluralist one), conversely, there can be various ways of realising solidarity with the poor, and there can also be different 'good things' achievable through stronger religiosity - for example, religiosity encourages stronger informal solidarity with the poor at the individual level (van Oorschot, 2006). The practical policy implications of our findings, therefore, can be drawn in a very different way. For example, given that stronger religiosity is linked to more individual solidarity but less preference for collective solutions, anti-poverty policies of a more religious society would need to be different from those of a less religious society – possibly requiring more voluntary/charity-based and voluntary/charity-looking support for the poor than governmental/authoritative aid, and more non-governmental bodies than official welfare offices dealing with benefits for the poor. On the one hand, welfare arrangements are diverse partly due to cultural differences; on the other hand, this diversity is necessary to suit differing cultural characteristics of each society.

CHAPTER SEVEN:

THE EX-POST EFFECT OF CULTURE

7.1 Introduction

In Chapter 2 above, we conceptualised the ex-post effect, or the post-decision making effect, of culture on social policy through individual policy attitudes which would collectively form the legitimacy base for concrete policies. It is assumed that the policy attitudes are, at least partly, dependent upon values individuals hold. In particular, when the societal values explored in this research have an impact on the policy attitudes, it can be argued that the cultural characteristics of each society have an influence on people's legitimating support for policies, in that the stable societal values are dominant values deeply embedded in a society. The empirical examination of this – whether the societal values have an impact on individual policy attitudes - is the task of this chapter.

In the next section, firstly, conceptualisation of the ex-post effect of culture will be briefly recapped. Then we need to discuss how the individual policy attitudes can be examined. We argue that an individual's take-up decision reflects her policy attitudes toward a concrete policy instrument. Based on this, the hypothesis is narrowed down with a concrete dependent variable, mothers' employment which we see as reflecting their take-up decisions of supports provided by family policy, especially when they are strongly supported by family policy: mothers' take-up decisions of supports by – or, their policy attitudes toward - family policy will be dependent upon their traditional family values. Introduction of operationalisation, data and methods leads to the results of our analysis. This will be followed by a discussion about the findings, limitations and implications – in short, it is suggested that policy makers who aim for more effective policy making can benefit from taking cultural values, especially of policy recipients or users, into consideration.

7.2 The Effect of Culture on Social Policy at the 'After' Stage

We conceptualised the twofold effect of culture on social policy (Section 2.5) drawing on the literature (Alcock, 2001: 16; Cnaan et al, 1993: 124; Pfau-Effinger, 2005: 6; Stewart, 2006: 186; van Oorschot, 2006: 24; 2007: 134-135): values influence public opinions which would set and limit policy options and policy agendas (the ex-ante effect as a causal factor); and values influence people's attitudes toward welfare policies, which would offer or withhold the legitimating support for policies (the ex-post effect as the legitimacy base).

The ex-post effect of culture on social policy is therefore expected to be revealed through the policy attitudes of people, given that the policy attitudes are the evaluation and judgement of a particular policy by people (Aalberg, 2003: 5-8). Even though cultural values have a certain impact on social policy making as a causal factor (as shown in the previous chapter for the ex-ante effect), decision making is not exclusively driven by the cultural context and there is often, if not always, cleavage to a certain extent between people's values and a specific policy. People may find that a particular policy is either more satisfactory or less in terms of their values and have either more positive policy attitudes toward the policy or less. When a policy is favoured and supported by people, it will be continued and expanded by government, whilst an unpopular policy can be amended, abrogated or replaced. In this sense, the policy attitudes of people, which would be partly dependent upon their values, have an impact on the future of a policy. The ex-post effect of culture on policy is found here (see Section 2.5.2).

7.3 Policy Attitudes and Take-Up Decisions

However, the policy attitudes of people may not be easily visualised publicly as discussed above (Section 2.6.2). We have assumed that people may show their policy attitudes more actively when they are negative rather than positive towards a specific policy, for examples, with petitions and demonstrations. It has also been suggested that there could be 'active resistance' and 'passive resistance' to a policy – whilst people may resist a policy voluntarily and more aggressively when their (material) interests are

threatened, they will possibly resist passively when, for example, they find that they cannot fully endorse a policy. If the cleavage between values and policies is to a certain degree unavoidable, we contend that this will mostly lead to passive not active resistance. In other words, it is assumed that the effect of values on policy attitudes will be revealed more clearly in the cases of passive resistance than in the cases of active resistance, which must be driven more strongly by interest dimensions.

We suggest that hesitation in taking-up a certain entitled service/benefit provided by a policy instrument is a possible way of passive resistance. In fact, many 'take-up' studies (e.g. Hancock et al, 2004; Riphahn, 2001) imply the influence of the cultural dimensions on decisions about 'non-take-up'.[106] Although they mostly attempt to explain non-take-up with a rather economic concept of 'hidden costs' which outweigh the potential benefits, it is recognised that beneficiaries' perceptions such as stigma, self-respect and the 'unpleasantness' of the claim process partly determine the hidden costs. Of more relevance to social policy, van Oorschot (1991: 23-24) suggests that the recipients' attitudes toward welfare policy in general are 'another missing key factor' influencing non-take-up, possibly forming or raising an 'instinctive barrier' (Graham, 1984, and Ritchie & Davies, 1988 in ibid).

This reasoning is supported empirically. For example, according to Pfau-Effinger (2004b: 100) the take-up of parental leave scheme depends more on 'motherhood culture' than types of schemes – the take-up rate in the 'more strongly family-oriented culture' of Germany is much higher than in Finland in spite of the Finns' more generous scheme. The public-funded professional caregiver policy was not successful (low take-up rate) in Germany for the same reason – here they prefer relatives' caring to professional care providers (Pfau-Effinger, 2005: 13-14). Taylor-Gooby (2008: 179-180) shows that there are many reports across various welfare areas about unexpected outcomes caused by inconsistencies between policy-makers' expectations and service

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[106] The 'take-up' of beneficiaries and recipients is the key to the success of a policy since the aim of a policy instrument – possibly alleviation of a social problem – is achievable only through the targeted groups' actual 'take-up'. For this reason, the '(non-) take-up' or 'take-up rate' has been a serious subject within policy analysts.

users' values. He argues that service users' decision-making is often more dependent on their values than their income, needs and the amount of information they have (see Section 2.3.4). In this respect, people's 'non-take-up' of entitled benefits/services reflect their 'negative policy attitudes' and their 'passive resistance' toward a specific policy - the impact of values on individual policy attitudes would be found with the evidence for the influence of values on individual take-up decisions.

In practice, however, 'take-up' data rarely exist. Rather a thorough review of both administrative sources and academic studies (Hernanz, Malherbet & Pellizzari, 2004) reports that information on take-up rates is very limited even within OECD countries – since governments do not produce it (except in the UK) and it is almost impossible to measure the precise number of 'potential beneficiaries'. For example, the 'entitled-but-not' claimants will not report their eligibility if there is a stigma attached to the claim. Thus studies of take-up rates have commonly 'estimated' national rates from data on individual socio-demographic and socio-economic status (Hernanz, Malherbet & Pellizzari, 2004: 13-17). In addition, the comparability of these national level take-up rates is questionable since contents and characteristics of a policy always vary by society (Bruning & Plantenga, 1999: 199).

Given this, we attempt to 'estimate' the take-up decisions at the individual level instead of 'estimating' the take-up rate at the national level. We assume that mothers' decisions to work show, at least partly, their 'take-up' decisions about supports provided by family policy such as leave schemes and public child care, particularly in societies strongly supporting maternal employment through family policy. However, this assumption includes many logical leaps – above all, since their decisions to work are not determined by their 'take-up' of family policy supports, their decisions not to work do not necessarily mean they have made 'non-take-up' decisions. Whilst this is a very critical limitation, there are some points to be considered. Firstly, as we discussed before, we need to 'estimate' individual take-up decisions. Like the take-up rate data, individual take-up decisions will be barely visible and measurable. Secondly, even if the take-up decision about family policy supports is only partially reflected in working decisions,

there are few alternatives for assessing the actual effect of family policy other than to examine mothers' working status. Thirdly, we need to extract examples of individual take-up decisions from the EVS-WVS dataset where we drew our six societal values, in order to examine the effect of values on take-up decisions. There is only limited information from which we can estimate individual take-up decisions but at least we would be able to say that mothers who (decide to) work are more likely to have positive attitudes toward supports provided by family policy than mothers who do (decide) not (to) work. Finally, we attempt to control (by including in the analysis) the suspected factors influencing their decisions (not) to work as long as possible – this will help us reveal the effect of traditional family values on take-up decisions.

7.4 Traditional Family Values and Family Policy

In the previous chapter we could see some aspects of the relationship between family policy and traditional family values at the collective level. That is, strong family values may be linked to support for the protection of male-breadwinners rather than working mothers and children. According to our data, stronger family values are likely to be positively related to public support for the unemployed (Section 6.5.2), but to be negatively related to welfare generosity (Section 6.6.2) and prioritising unemployment in welfare budget allocation (Section 6.6.3). We have assumed that this is because traditional family values emphasise the traditional roles of family members, the traditional family format, reciprocity between members and the self-sufficiency and independence of the family. This also echoes the findings and arguments in existing studies. It is reported that 'nations of families' are more likely to support a breadwinner-father, homemaker-mother and dependent children, whilst 'nations of individuals' tend to be more concerned about supporting working mothers and protecting children's rights (Chesnais, 1996 in Brewster & Rindfuss, 2000: 284).[107] In such 'nations of families' breadwinner-fathers are supported by stronger employment protection legislation and unemployment benefits (Boeri, Börsch-Supan & Tabellini, 2001: 12). In this respect,

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[107] In Chapter 5 (Section 5.2) we saw that Chesnais' classification was compatible with the results of our analysis of values – nations of families showed stronger traditional family values, which is also in accordance with Gundelach's (1994) claim that Anglo-Nordic people are more individualism-oriented.

there is a degree of irony. In nations of families where the family is a more important social unit with stronger family values, policies supporting families would be welcomed collectively but not quite so welcomed individually (by individual families). That is, successful family policies would be more difficult to make in nations of families than in nations of individuals because they have to meet somewhat contradictory needs.

In practice, this can be more so given that the term 'family policy' is widely used to indicate policies designed to reconcile female employment and family responsibilities, mainly through childcare and parental leave schemes (e.g. see family policy index in the Luxembourg Income Study). Family policy focused on supporting working mothers can be less popular where strong traditional family values exist. If, as we hypothesised, values affect policy attitudes, traditional family values will have an impact on 'negative' attitudes toward family policy. For example, mothers with strong traditional family values will be less likely to rely on public care. They will be more likely to choose 'parenting' instead of 'working' (leaving their children to be cared for by others) than those with weaker family values. In other words, mothers with strong traditional family values can have higher 'instinctive barriers' to the take-up of supports offered by family policy (more negative policy attitudes toward these policies). We have already seen (in the previous section) that this is the case by looking at Pfau-Effinger's example (2004b). It has also been suggested from the qualitative research perspective that mothers consider moral and social norms when they take decisions about reconciling working and parenting in the context of 'welfare-to-work' programmes (Duncan & Irwin, 2004: 397, in Taylor-Gooby, 2008: 179-180). We also attempt to examine this – the relationship between mothers' decisions to work and their traditional family values.

7.5 Data, Operationalisation and Method

7.5.1 Mothers' decisions to work (take up supports provided by family policy)

Information on mothers is very limited within the EVS-WVS data. In particular, there is no data on whether the respondent is living with her own children, how old the children

are, whether they are using public-funded child care, in leave schemes and so on. This is a very serious limitation for our analysis. The only relevant information given is whether respondents have had any children, and how many people of a specific age-duration (e.g. younger than 5 or from 5 to 10) are currently living in their household.[108] Worse still, the answers to the latter question are only available for the data of wave 1 (1981/2) and wave 3 (1999/2000). Drawing on these items, we have made three object groups for both waves to examine: 1) women aged from 20 to 59, who have had children; 2) women aged from 20 to 59, who have had children and have people in their household under the age of 18; and 3) women aged from 20 to 59, who have had children and have people in their household under the age of 5. Our target group is, of course, the third group, yet we need to proceed step by step from the more broadly defined group to the more narrowly defined group – because there is a lack of information concerning mothers who are at the critical moment of reconciling their working and parenting and so targeted by family policy, we need to see some patterns, if there are any, to validate the results of our limited operationalisation. Since we aim to investigate mothers who are encouraged to work by family policy, we limit the age of cases to between 20 and 59. Women of this age would be more active in the labour market. Within our dataset, the number of cases under the age of 20 with children is just 70. At the other end of the spectrum, after the age of 60 the number of economically inactive women suddenly starts to (far) exceed the number of working women. In addition, it is less probable that those over the age of 60 are living with their 'own' children younger than 5 years old.

Selected cases have been split into two groups in terms of their working status. Originally the variable about employment status had 8 categories, but we code as 1 (working) respondents who chose the categories of full time worker, part time worker, self-employed and students, and 0 (not-working) those that described themselves as retired, housewife, unemployed or other. In particular, by looking at working mothers with children under the age of 5 we attempt to get a little closer to those mothers who need to make a decision about combining working and parenting taking into

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[108] The latter question can be seen, generally, as asking about the respondent's own child, particularly because this question follows the question about whether the respondent has had any child. However, we cannot deny that it is probable that a respondent is living with, for example, her/his niece or grandchild.

consideration the supports offered by family policy – although this is not the ideal route to follow.

7.5.2 Independent Variables

Predictor variables are also limited within the EVS-WVS data. There is no information about, for example, whether a respondent is living with a partner, whether they can only maintain a decent standard of living by earning a dual-income or whether a respondent can get help with child care from grandparents and so on. We include just four of the 'available' compositional factors in addition to our variable of the level of traditional family values: the respondent's age; the level of education; whether the respondent is the chief wage earner in the household; and their income level.

Targeted respondents have been split into four age groups by a 10-year gap, from 20 to 29, from 30 to 39, from 40 to 49 and from 50 to 59. We assume that, all things being equal, younger mothers will be less likely to work than older mothers because older mothers may have been developing their careers for a long time, which implies a higher opportunity cost if they do not work. The standardised measure across societies for the education level of respondents is not offered for all waves and all cases in this dataset. Instead, another imperfect measure – the age the respondent completed her education – has been used for the education level. This has a 10-point scale from 1 showing a respondent completed her education under 13 years old to 10 showing that she did over 20 years old. More educated mothers may also, if other conditions are controlled, tend to work more because they can have better jobs in terms of career building and salaries (again, the larger opportunity cost). Meanwhile, a mother would be forced to combine her work and family responsibility if she is the chief wage earner in her household. Information on the respondents' income within the EVS-WVS data is also very limited - possibly because the income 'scale' can hardly be comparable across countries. Only the household income level by either 10 steps or three categories (low, medium and high) is offered. Although we use the variable with more categories (i.e. the 10-step variable: from the first step for the lowest income group to 10th step for the highest income group), it is not deniable that this is another imperfect measure used in our analysis. It is

assumed that generally income level will also reflect opportunity cost – mothers of higher income level may have jobs with greater salaries and will therefore be more likely to want to keep their jobs.

Table 7.5.1 Groups of countries by the degree of policy effort for supporting employment of mothers with children under 6

	1984 – 1987		The late 1990s - 2000	
	Country	Index Score[a]	Country	Index Score[b]
High Effort Group	France	64.9	Denmark	0.94
	Denmark	63.7	Sweden	0.89
	Sweden	61.9	Norway	0.80
	Finland	60.8	Finland	0.74
	Belgium	55.6	Belgium	0.73
	Italy	50.6		
Moderate Effort Group	Luxembourg	35.2	France	0.66
	Germany	34.1	Netherlands	0.65
	Canada	32.4	Luxembourg	0.65
	Netherlands	32.0	Germany	0.55
	Norway	31.2		
Low Effort Group	United Kingdom	21.6	United Kingdom	0.45
	Australia	19.2	Canada	0.36
	United States	17.1	United States	0.24

[a] Index of policies that support employment for mothers with children under 6 (Gornick, Meyers & Ross, 1997).
[b] Index of policies that affect families with children aged 0-5 (Gornick & Meyers, 2003).

To what degree mothers' employment is supported by family policy is gauged by drawing on Gornick and her colleagues' family policy index (Gornick, Meyers & Ross, 1997). They examine the variation of policy efforts which affect maternal employment patterns across 14 industrialised nations, based on 16 policy indicators covering various policy areas such as benefits for parents, child care, and public school policies drawn from data collected in the 1980s.[109] Later, they developed their index further and formulated the family policy index which covers more policy areas (22 policy indicators)

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[109] In detail, these 16 indicators are: legislated job protection; paid maternity leave; wage replacement rate; coverage; paternity benefits; tax relief for child care; guarantee child care coverage (ages 0-2); guaranteed child care coverage (ages 3-5); percentage of children (ages 0-2) in publicly funded child care; percentage of children (ages 3-school age) in publicly funded child care; percentage of children (age 5) in pre-primary or school; percentage of children in publicly funded after-school care; age of compulsory school; school-day; school-year; and continuous school-day.

with more recent data - mostly of 2000 with a few data from the late 1990s (Gornick & Meyers, 2003). Since they extended policy areas reflected in their index and changed the formula for the index, these two indices are not directly comparable. However, variation between the most developed countries in the policy effort to support mothers in combining working and parenting appears clear in their index scores at each time points.

According to their work (Gornick & Meyers, 2003; Gornick, Meyers & Ross, 1997), countries can be clearly classified into three groups of strong, moderate and weak family policy countries in the 1980s (Table 7.5.1). Although this distinctiveness becomes somewhat blurred in 2000, countries are still loosely divided into three groups for our analysis. The country groups by the level of family policy in the 1980s are used for our examination of mothers' decisions within the data of the 1981/2, while country groups according to the degree of policy support for the employment of mothers with children under 6 at the late 1990s and 2000 are used for our analysis of the data for 1999/2000.

7.5.3 Statistical technique: (binary) logistic regression

We attempt to explain (predict) mothers' employment status or choice of working or not-working, which is a 'discrete' outcome (variable) in statistical terms. There are several statistical techniques available for discrete dependent variables; nonetheless, we have chosen the logistic regression technique which is more 'flexible' (free from restrictions) than many of the other techniques. For example, this technique has no assumptions about the normal distributions of the predictor variables, does not assume a linear relationship between independent variables and can be used for any mix of dichotomous, discrete and continuous predictor (independent) variables.

Briefly, for ease of understanding at the expense of detailed discussion including equations, the basic rationale of the logistic regression is to predict 'the probability' that an outcome falls into one category instead of predicting the exact value of outcomes, because the linear relation between the outcome and the set of predictors which is assumed in regression cannot be applied for the 'discrete' (not continuous) outcomes. The reason why the probability is measured with this technique is because we can

predict 'the odds' of discrete outcomes. On the one hand, while the odds of an event is the ratio of the probability of the event to the probability of 'not-that-event', the 'logit' (the natural logarithm of the odds) is a 'linear' function - we can predict the logit with a set of predictors as we do in regression. By reversing the definition of the odds, on the other hand, the probability of an event can be present as the ratio of the odds of the event to the same odds plus one. Based on this, we can predict the (logit – natural logarithm of) odds with a set of variables by regression technique, and as a result, we can predict the probability of each event.

It is suggested that the 'Goodness-of-Fit' of each model can be assessed by the 'Hosmer-Lemeshow statistics' (Tabachnick & Fidell, 2007: Ch. 10). Although we can assess whether the expected outcomes of our model are an adequate duplication of the observed outcomes by conducting a 'Chi-square' test (in this test, it is therefore desirable that the model Chi square statistics show a non-significant difference), when the number of cases is large, any differences can be statistically 'significant'. This possible error due to the 'large N' can be reduced through 'Hosmer-Lemeshow statistics', another method to evaluate the goodness-of-fit of models.[110] Here too, the non-significant chi-square value is expected when the model is good. Results of these statistical calculations will be attached in the results table of each analysis.

In logistic regression there is no such thing as an 'R-square' of the linear regression, which shows the effect size or explanatory power of a model. Instead, some statistics have been suggested as an analogy to R-square, based on differences in (log) likelihoods between the attempted model and the constant-only (no predictor) model. Within several examples, the Nagelkerke's measure of R-square will be presented for each result, which is ostensibly closer to the format of R-square in linear regression than other measures.[111]

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[110] This method examines the 2×10 contingency table by two observed outcome categories and ten deciles groups of estimated probability. If the model is good, frequencies of this table would be polarised, whilst these would be evenly spread when the model is not good.

[111] This measure is designed to be able to reach to 1 (so more similar to the R-square value in the regression) as the maximum value.

Within evaluating the contribution of each predictor variable to the model, it is suggested that examining change in model fit with adding/removing a predictor (so-called the likelihood-ratio test) is more reliable than the 'Wald' test which divides the squared coefficient by its squared standard error. We apply the likelihood-ratio test here. In addition, we can interpret the coefficient for each predictor differently through the odds ratio. The odds ratio is the change in odds (of one outcome category) when the value of a predictor variable increases by one unit, and the coefficient tells us how much the odds change - the odds of one outcome category when the value of a predictor increases by one unit is 'the odds ratio' times as big as the odds before.[112] That is, the closer the odds ratio is to 1, the smaller the effect. The farther the odds ratio from 1, the more influential the one unit change in the predictor is. This will become clearer when we interpret the odds ratio with the examples in the next section.

If the probability of each subject being in one outcome category is estimated, we can classify all the subjects by those probabilities with the cut-off point of 0.5: subjects with a probability of below 0.5 into one category (not-favourable event); and the rest into the other category (favourable event). Based on this, the overall success rate of classification by the model can be examined and these will be presented below each result table. Finally, as we used the 'Enter' method in linear regression in the previous chapter, we apply the 'direct' (Enter) logistic regression instead of sequential and statistical (stepwise) methods. To put it another way, it is not our aim to determine the best model and we have no specific hypotheses about the order or importance of predictor variables (for more about logistic regression, see Tabachnick & Fidell, 2007: Ch. 10).

7.6 Results: Mothers' Decisions to Work and Family Values

7.6.1 Working mothers, their traditional family values and family policy in the early 1980s
Our data analysis shows that the degree of traditional family values mothers have is a factor for predicting the working status of mothers (Table 7.6.1). The stronger the

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[112] The change in odds is the odds multiplied by (e^B-1), when B is the coefficient and e is the constant.

traditional family values mothers have the less likely to work appear they to be (with the negative coefficient and the odds ratio less than 1). As discussed above, since our data do not offer much information about mothers and their children, we attempt to see a general pattern by constructing three models with different group of mothers: mothers who have had a child (ever mothers); 'ever mothers' who are now living with people under the age of 18 in the same household; and 'ever mothers' who are living with people under the age of 5 in the same household. Although there is a probability that a person under 18 or under 5 in the same household is not their own child, through these three prediction models we may be able to assume that there is no serious exaggeration in saying that mothers having stronger family values are less likely to work than those of weak family values.

Table 7.6.1 Prediction of mothers' working status[a] by socio-economic factors and their family values within nine societies[b] in the early 1980s

Groups	Mothers (have had any child)[c]			Mothers living with child under 18[d]			Mothers living with child under 5[e]		
	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]
Age (refer to the group of 50 ~ 59)			9.59			8.96	-	-	-
20 ~ 29	-.11	.90		.19	1.21		-	-	-
30 ~ 39	.26	1.29		**.55***	1.74		-	-	-
40 ~ 49	.29	1.34		.48	1.61		-	-	-
Education completed age (low ~ high)	**.10****	1.11	24.00	**.11****	1.11	20.53	**.16****	1.18	14.68
Chief Earner of household (no / yes)	**1.46****	4.31	83.51	**1.39****	4.01	49.65	**1.37****	3.92	14.35
Household Income Scale (first ~ 10th step)	**.24****	1.28	81.60	**.23****	1.26	50.31	**.23****	1.26	18.34
Traditional Family Values	**-.24****	.79	21.07	**-.22****	.80	14.26	**-.21***	.81	4.61
N (weighted)	1,653			1.233			453		
Nagelkerke R square	0.181			0.164			0.149		

Data: EVS-WVS 1981/2. ** Significant at the 0.01 level; * significant at the 0.05 level.
[a] By working (full-time, part-time, self-employed and students) and not-working (retired, unemployed, housewife and others).
[b] Belgium, Canada, Denmark, France, Italy, Netherlands, Norway, UK and the US.
[c] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=7.597; df=8; P>0.05); overall success rate of classification was 64.0%.
[d] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=1.788; df=8; P>0.05); overall success rate of classification was 64.6%.
[e] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=10.328; df=8; P>0.05); overall success rate of classification was 65.2%.
[f] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

In addition, it is suggested that mothers who are the chief earners of their households, who have higher levels of household income and who stayed longer in the formal education system are more likely to work. As we assumed above, more educated and larger income earning mothers seem to face a greater opportunity cost if they do not work. It is not surprising that mothers are more likely to work when they are chief earners of their household. Within mothers with children under the age of 18 those in their 30s are more likely to work than those in their 50s. On the one hand, mothers in their 30s would be less stable financially and more likely to need to work. On the other hand, mothers in their 30s would be more active in participating in the labour market. In analysis of the third group (mothers living with child under 5), very understandably, there are few cases for age groups of 40s and 50s.[113] After excluding them, we have only two age groups of 20s and 30s, and there is not much point including age as a predictor variable.

As the number of cases is different across three models, a direct comparison between models is impossible - the size of contribution is not comparable across models and only tells us which factor is more critical within a model. For example, we do not know whether mothers with a child under 18 are more likely to refer to their family values in deciding to work (with contribution value of 14.26 in the table) than mothers with a child under 5 (with contribution value of 4.61 in the table). It is suggested only that socio-economic factors are more influential than family values in working decision of mothers regardless of their children's age. However, we can compare the order of factors by their sizes of contribution between different models. Whilst whether a mother is the chief earner of household is the most influential factor for predicting the working status of 'ever mothers', within the mothers living with child under the age of 5 group this appears to be less important for deciding to work than education level and household income level – although the odds that a chief earner mother is working are 3.9 times as large as the odds that not a chief earner mother is working. This does not imply that mothers with younger children are less bothered with the fact that they need to work and

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[113] This indirectly supports our assumption that the survey item of 'are you living with people under the age of 18 (or 5)' following the question of 'have you had a child' would show whether they are living with 'their own' children under 18 (or under 5).

earn money as chief earners of household, but that their decisions to work are surrounded by more things to consider which is as critical as the fact that they are chief earners – one of those would be that they need to care for their young children.

In the previous section (Table 7.5.1), we have been informed by Gornick and her colleagues (Gornick, Meyers & Ross, 1997) that countries could be classified into three groups by the level of family policy – that is, how much the maternal employment is supported by policies – in the mid 1980s. By including this in our prediction, firstly, we can examine the effect of traditional family values under control of the impact of family policy. Secondly, it can be examined whether mothers' decisions to take up certain supports provided by family policy are dependent upon their family values – we assume that working mothers with children under the age of 5 within countries strongly supporting maternal employment are actually taking up supports provided by family policy. The latter is examined in comparison with countries where mothers' employment is supported moderately and only weakly.

Table 7.6.2 Prediction of working status[a] of mothers living with children under 5 by socio-economic factors, their family values and the degree of support by family policy within nine OECD countries[b] in the early 1980s[c]

	B	Odds ratio	Contribution[d]
Education completed age (by 10 steps of under 13 ~ over 20)	.167**	1.182	14.698
Chief Earner of household (no / yes)	1.466**	4.332	15.674
Household Income Scale (refer to the highest step)	.247**	1.280	20.343
Traditional Family Values	-.332**	.718	9.737
Family Policy (referred to the strong family policy group)			11.527
Weak family policy country group	-.813**	.444	
Moderate family policy country group	-.721**	.487	
N (weighted)		453	
Nagelkerke R square		0.179	

Data: EVS-WVS 1981/2. ** Significant at the 0.01 level; * significant at the 0.05 level.
[a] By working (full-time, part-time, self-employed and students) and not-working (retired, unemployed, housewife and others).
[b] Belgium, Denmark, France, Italy (strong family policy effort countries), Canada, Netherlands, Norway (moderate family policy effort countries), UK and the US (weak family policy effort countries) – see Section 7.5 drawing on Gornick et al (1997).
[c] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=6.186; df=8; P>0.05); overall success rate of classification was 67.6%.
[d] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

Regardless of how much maternal employment is supported by policy instruments, our data suggest that mothers tend to refer to their values in deciding to participate in the labour market (Table 7.6.2). Compared to the last model in Table 7.6.1 (we can compare these two since they were constructed based on the same cases), the effect of family values becomes clearer when controlling for the impact of family policy (with decrease in odds ratio which is farther from 1 in Table 7.6.2). Family policy appears to 'work' to some degree – mothers living in countries where their employment is strongly backed up are more likely to work than those in countries moderately supporting maternal employment. Mothers only weakly supported by family policy are the least likely to work. It is probable that more mothers would find it hard to reconcile their jobs with child-rearing in countries only weakly and moderately supporting their employment and decide not to work than in societies strongly supporting maternal employment.

Table 7.6.3 Prediction of working status[a] of mothers living with children under 5 by the level of family policy groups within 9 OECD countries[b] in the early 1980s

Group by Policy Effort	Low[c]			Moderate[d]			High[e]		
	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]
Education Level	.15	1.16	2.78	.13	1.14	2.34	**.18****	1.19	7.71
Chief Earner (yes/no)	**1.46***	4.29	7.69	1.06	2.90	2.52	**2.23****	9.28	10.08
Income Level	**.29****	1.34	12.13	.11	1.12	1.63	**.38****	1.47	16.17
Traditional Family Values	-.16	.85	.80	-.21	.81	1.21	**-.63****	.53	12.29
N (weighted)	132			144			177		
Nagelkerke R square	0.170			0.069			0.298		

Data: EVS-WVS 1981/2. ** Significant at the 0.01 level; * significant at the 0.05 level.
[a] By working (full-time, part-time, self-employed and students) and not-working (retired, unemployed, housewife and others).
[b] Belgium, Denmark, France, Italy (strong family policy effort countries), Canada, Netherlands, Norway (moderate family policy effort countries), UK and the US (weak family policy effort countries) drawing on Gornick et al (1997).
[c] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=12.827; df=8; P>0.05); overall success rate of classification was 69.0%.
[d] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=11.450; df=8; P>0.05); overall success rate of classification was 61.6%.
[e] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=2.196; df=8; P>0.05); overall success rate of classification was 69.4%.
[f] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

Analysis of each group by family policy effort (Table 7.6.3) shows that traditional family values become more crucial in decisions to work when such decisions become

more a matter of choice – in nations strongly supporting maternal employment, mothers may be more able to keep their jobs (by taking up supports provided by family policy). In this case, according to our data, mothers tend to refer to their family values to an even greater extent than to the fact that they are chief bread-winners of their households (with a larger contribution by family values in the table). Where mothers' employment is not strongly supported and their decisions are thus more heavily dependent upon conditions – for example, the lack of child care support may force them to quit their jobs to care for their babies or to keep their jobs to pay for the cost of private child care which is not supported, the impact of family values is found to be weak.

Through predictions of mothers working status at the early 1980s within nine OECD countries (from Table 7.6.1 to Table 7.6.3), it has been suggested that mothers' participation in the labour market is partly dependent upon traditional family values, whilst family policy focusing support on the employment of mothers who have children below the school age appears to succeed in part by enabling more mothers work. Given that a mother's decision to work partly but inevitably means their taking up of support provided by family policy within societies with a strong family policy effort, it can be said that the individual take-up decision on family policy support is influenced by traditional family values. Linked to our hypothesis, given that the take-up decision can be a way of realising and expressing individual policy attitudes to a concrete policy, our data suggest that policy attitudes are partly dependent upon values, as we hypothesised.

7.6.2 *Working mothers, their traditional family values and family policy at 2000*

The same analyses have been conducted but with more up-to-date data. Unfortunately, within data at 2000 we could not find any significant effect of traditional family values as a factor for predicting the working status of mothers (Table 7.6.4). There are two possible explanations for this. Firstly, although the level of traditional family values has been rather stable over time at the collective level (see Section 5.2 and 5.3), within our individual level analyses in this chapter the level of family values of mothers at 2000 is

clearly lower than that of mothers in the 1980s.[114] Possibly, the instinctive barrier to decisions to work generated by traditional family values is not so great for mothers at 2000. Secondly, social-structural change would have made mothers' participation in the labour market a matter less relevant to mothers' traditional family responsibilities, to the reconciliation between working and child rearing and to traditional family values. In fact, it is now rather customary for women to be part of a dual-earner couple, to keep their jobs and develop their careers over the course of a marriage as well as having babies, taking their children to nurseries and pre-school units and so on. Mothers working are not that different from women working nowadays. In fact, within our object nine OECD societies at 1981 and eight OECD countries at 2000, the percentage of 'working' mothers who live with children under the age of 5 has increased from 49.0% to 62.3% (at 2000, the percentage of women working is 68.2%). Development of family policy would have also contributed to this change. Even within the weak family policy effort countries by Gornick and Meyers' family policy index (2003), paid maternity leave is given for 15 weeks at 2000 (within the strong family policy effort group, it is given for 18 weeks).[115] Mothers at 2000 would not have agonised about their working decisions as much as those in the 1980s.

As for the other factors, household income level is an exclusively powerful factor between our predictors at 2000, whilst whether a respondent is the bread-winner of the household has become a less influential determinant. Possibly, having a job has become something for more than just 'bread' (survival) at least within these the most affluent societies. This implies that subsistence is not the major reason for finding a job any more in these societies. Meanwhile, the vanished impact of the education level at 2000 can also be partly accounted for by the increase in women's and mothers' employment in general. 'Having a job' and 'developing a career' is not a privileged thing for (more) educated women (mothers) any more. In other words, 'being more educated' does not

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[114] The average score of family values for mothers at 1981/2 was about -0.25 whilst it was about -0.35 at 2000. This raises a question which cannot be dealt with within the limit of this research – why mothers' traditional family values have declined for two decades whilst those of others, even women as a whole have not.
[115] The only exception to this is the US.

generate a significantly larger opportunity cost for not-working than 'being less educated'.

Table 7.6.4 Prediction of mothers' working status[a] by socio-economic factors and their family values within 8 OECD societies[b] at 2000

Groups	Mothers (have had any child)[c]			Mothers living with child under 18[d]			Mothers living with child under 5[e]		
	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]
Age (refer to the group of 50 ~ 59)			12.5			4.7	-	-	-
20 ~ 29	.24	1.27		.41	1.50		-	-	-
30 ~ 39	**.46****	1.58		**.59***	1.81		-	-	-
40 ~ 49	**.44****	1.56		.53	1.70		-	-	-
Education completed age (low ~ high)	.02	1.02	.6	.03	1.03	1.3	.01	1.01	.0
Chief Earner of household (no / yes)	**1.28****	3.59	85.1	**1.34****	3.82	59.8	**1.01****	2.75	9.5
Household Income Scale (first ~ 10th step)	**.36****	1.43	187.6	**.36****	1.43	130.3	**.35****	1.42	43.2
Traditional Family Values	-.04	.96	.8	-.08	.93	1.9	.07	1.07	.4
N (weighted)	1,482			1,001			362		
Nagelkerke R square	0.189			0.192			0.155		

Data: EVS-WVS 1999/2000. ** Significant at the 0.01 level; * significant at the 0.05 level.
[a] By working (full-time, part-time, self-employed and students) and not-working (retired, unemployed, housewife and others).
[b] Belgium, Denmark, Finland, France, Germany, Luxembourg, Netherlands and the UK.
[c] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=12.190; df=8; P>0.05); overall success rate of classification was 69.2%.
[d] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=5.256; df=8; P>0.05); overall success rate of classification was 70.0%.
[e] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=8.228; df=8; P>0.05); overall success rate of classification was 67.4%.
[f] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

Our conjecture of change in the nature of women's and mothers' employment decisions by the decrease in their levels of traditional family values and the increase in their employment rates is supported by comparison of analysis of the working status of 'ever mothers' (who have had to consider childcare issues at some point in their lives) over time (Table 7.6.5) – we cannot more specify the group of mothers because of the lack of information within the EVS-WVS data of 1990.

Table 7.6.5 Prediction of ever mothers' working status[a] over time

Group by Policy Effort	1981/2[b]			1990[c]			1999/2000[d]		
	B	Odds ratio	Contri-bution[e]	B	Odds ratio	Contri-bution[e]	B	Odds ratio	Contri-bution[e]
Age (refer to the group of 50 ~ 59)			15.4			24.7			35.9
20 ~ 29	-.01	.99		**.29***	1.33		**.29***	1.34	
30 ~ 39	**.25***	1.29		**.41****	1.51		**.50****	1.64	
40 ~ 49	**.41****	1.50		**.54****	1.71		**.61****	1.84	
Education completed age (low ~ high)	**.12****	1.13	47.7	**.11****	1.11	47.9	**.09****	1.10	32.6
Chief Earner of household (no / yes)	**1.42****	4.14	113.1	**1.56****	4.74	199.5	**1.41****	4.08	207.7
Household Income Scale (first ~ 10th step)	**.17****	1.19	64.4	**.23****	1.26	168.7	**.28****	1.32	225.9
Traditional Family Values	**-.24****	.79	31.6	**-.10***	.91	5.5	-.04	.96	1.0
N (weighted)	2,407 (13 countries)			3,178 (17 countries)			3,152 (17 countries)		
Nagelkerke R square	0.166			0.218			0.207		

Data: EVS-WVS
** Significant at the 0.01 level; * significant at the 0.05 level.
[a] Working (full-time, part-time, self-employed and students) or not-working.
[b] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=6.731; df=8; P>0.05); overall success rate of classification was63.7%.
[c] The result of Hosmer-Lemeshow goodness-of-fit test was not bad given the large number of cases (X^2=16.095; df=8; P=0.041); overall success rate of classification was 68.6%.
[d] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=10.158; df=8; P>0.05); overall success rate of classification was 69.2%.
[e] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

Although the three models in this table are not directly comparable (sample countries and the number of cases are different), we can see the fade-away effect of traditional family values over time. At 1981 the level of family values contributed much more than the respondent's age, yet lost most of its effect at 1990 and hardly contributed to the prediction at 2000. Whether the respondent is the chief earner of her household took the place of the most important predictor in 1981/2, but was challenged by the income level at 1990 and finally gave up its position to household income level at 2000. The education level has also lost some of its impact over time. Since within this group of 'ever mothers' there is no information on the ages of their children, respondents belonging to the older age group are possibly freer from child care and more likely to have a job. All of these patterns are similar to what we saw above.

***Table* 7.6.6** Prediction of working status[a] of mothers living with children under 5 by socio-economic factors, their family values and the degree of support by family policy within 8 OECD countries[b] at 2000[c]

	B	Odds ratio	Contribution[d]
Education completed age (by 10 steps of under 13 ~ over 20)	-.023	.977	.000
Chief Earner of household (no / yes)	**1.013****	2.753	9.481
Household Income Scale	**.338****	1.403	43.178
Traditional Family Values	.036	1.037	.410
Family Policy (referred to the strong family policy group)			4.918
Weak family policy country group	**-.819***	.441	
Moderate family policy country group	-.301	.740	
N (weighted)		362	
Nagelkerke R square		0.171	

Data: EVS-WVS 1999/2000
** Significant at the 0.01 level; * significant at the 0.05 level.
[a] By working (full-time, part-time, self-employed and students) and not-working (retired, unemployed, housewife and others).
[b] Belgium, Denmark, Finland (strong family policy countries), France, Germany, Luxembourg, Netherlands (moderate family policy countries), and the UK (weak family policy countries) drawing on Gornick & Meyers (2003).
[c] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=5.402; df=8; P>0.05); overall success rate of classification was 66.7%.
[d] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

In this respect, it is to be expected that levels of traditional family values and education will have hardly any observable impact on the employment of mothers with children under 5 in the data of 2000, even after the inclusion of measures gauging how much they are supported by family policy (Table 7.6.6). As we have discussed, household income level is a more powerful factor influencing mothers' employment than whether they are bread-winners of their households. Compared to the result in the 1980s (Table 7.6.2), the explanatory power of the degree of support by family policy appears relatively small, with statistically insignificant difference between the moderate and strong family policy groups. It is probable, as we discussed in the first part of this section, that the general level of family policy has improved across these eight OECD countries and the gap between degrees of support for maternal employment between these groups has been narrowed.

Finally, the same prediction but by country groups of the level of family policy at 2000 was conducted and, as expected, produced no significant impact of traditional family values within analyses of any group. Instead, we attempted to extend target cases from

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mothers living with children under the age of 5 to (ever) mothers (Table 7.6.7). Still, but a little loosely, our assumption is that working mothers in societies strongly supporting their employment are 'actually' taking up supports provided by family policy. Here again, whilst the impact of family values is barely present in the low and moderate family policy effort groups, the level of family values is a significant factor in maternal employment where family policy strongly supports mothers having jobs. It is suggested that mothers are more likely to refer to their traditional family values when their decisions to participate in the labour market are more about taking up of supports offered by family policy.

Table 7.6.7 Prediction of mothers' working status[a] with compositional factors and traditional familism by group of the level of family policy[b] at 2000

Group by Policy Effort	Low[c]			Moderate[d]			High[e]		
	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]	B	Odds ratio	Contri-bution[f]
Education level[c]	-.04	.96	.13	.01	1.01	.03	.05	1.05	1.17
Chief Earner (yes/no)	**1.22***	3.37	7.35	**1.29****	3.62	41.51	**1.19****	3.27	25.43
Income (low ~ high)	**.51****	1.67	27.62	**.27****	1.31	60.28	**.46****	1.59	104.00
Traditional Familism	.04	1.04	.08	-.01	.99	.03	**-.21***	.81	5.99
N (weighted)	158			729			594		
Nagelkerke R square	0.219			0.133			0.238		

Data: EVS-WVS 1999/2000. ** Significant at the 0.01 level; * significant at the 0.05 level.
[a] Working or not-working within cases of women aged 20 to 59 having one or more children.
[b] Belgium, Denmark, Finland (high family policy effort countries), France, Germany, Luxembourg, Netherlands (moderate family policy effort countries), and the UK (low family policy effort countries) drawing on Gornick & Meyers (2003).
[c] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=5.434; df=8; P>0.05); overall success rate of classification was 69.7%.
[d] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=4.726; df=8; P>0.05); overall success rate of classification was 64.8%.
[e] The result of Hosmer-Lemeshow goodness-of-fit test was good (X^2=7.576; df=8; P>0.05); overall success rate of classification was 75.1%.
[f] By the likelihood ratio test, which shows change in -2 log-likelihood if the variable is removed from the model.

Drawing on the results from data of both the 1980s and 2000, it is suggested that individual take-up decisions are partly dependent upon their values and that the cultural values individuals hold are likely to affect their policy attitudes toward concrete policies.

7.7 Chapter Concluding Remarks

It has been suggested that the ex-post (or post-decision) effect of culture on social policy can be found in the legitimating support levels for a concrete policy (Cnaan et al, 1993: 124; van Oorschot, 2006: 24) and people's policy attitudes based on their evaluation and judgement of a policy (Aalberg, 2003: 5-8). We cannot, however, expect policy attitudes to be easily observed given that they are not often expressed publicly unless they are polled or negative to some degree. Even within factors affecting policy attitudes, values would not be as influential as interest dimensions. To examine the effect of values on policy attitudes, therefore, we need to narrow down the circumstances where values might play a bit larger role, for example, to cases of 'passive resistance' through take-up decisions (Section 7.3). Here we have investigated the policy attitudes of mothers toward, and implicitly their take-up decisions of, family policies supporting their employment. It was suggested through our empirical data analysis that mothers' employment is likely to be dependent, partly, upon the level of their traditional family values. In particular, mothers with young children (under the age of 5), who possibly find it harder to reconcile their working and parenting, appear to refer to their family values when deciding to take up supports provided by family policy and to work. Where maternal employment is strongly supported by family policy, mothers with young children are less likely to work if they have stronger traditional family values (Section 7.6).

When people's policy attitudes are linked to their take-up decisions, the ex-post effect of culture has practical implications for social policy making. Whilst offering or withholding the 'legitimacy base' for a policy is a rather abstract concept, affecting take-up decisions is more critical and closer to the ultimate aim of 'effective' policy making. Policy-makers may be sensitive to how successful a policy instrument is since the low take-up rate of a policy may cause a conflict over the efficient use of welfare resources. Therefore, if mothers' values matter in family policy as it has been reported in the literature (Duncan & Irwin, 2004: 397, in Taylor-Gooby, 2008: 179-180) and shown by our analysis, for example, we may need to develop more sophisticated family policy –

where mothers are more strongly oriented to traditional family values, reflection on their preference for home child care over public care (particularly when their children are at pre-school age) can help bring about more efficient policy making, for example through an optional extended leave scheme or job-training specially designed for mothers whose children will shortly be reaching school-age. With another example, where the public funded residential care services of professional caregivers are eschewed for traditional care by relatives (Pfau-Effinger, 2005: 13-14) we may need to adopt a different approach, for instance, increasing support for informal caregivers. That is, taking policy recipients' values into consideration could be a way of effective policy making. Taylor-Gooby and Wallace (2009) also contend that the lack of understanding of service users' values in the recent social policy reform of the UK has damaged the legitimacy of welfare provisions as well as public trust in services. Possibly, it has been and will be another pressure on social policy to be diversified, which has already been so since the end of the invariable expansion of welfare across welfare states.

Cultural analysis of social policy would arguably be consolidated and enriched by diversifying angles and foci, as we have done in this research. Here, the ex-post effect of culture on social policy has been conceptualised in a clearer manner and examined empirically, instead of being seen as merely a factor for policy outcomes deviating from the expectations of policy makers or a matter to be examined mainly by either theoretical reasoning or qualitative approaches. Our empirical examination has hopefully illuminated the point that the ex-post effect of culture is in fact another causal effect on social policy making, when a broader viewpoint of the policy process is taken. When there is less public support for a policy, or if the non-take-up rate is higher, policy reform, policy innovation or the introduction of a new policy is necessary. In this respect, the examination of the ex-post effect of culture holds great promise although the field is still understudied with the exception of the few examples reviewed above (Section 2.3.4).

However, if our choice to look at passive resistance and take-up decision has facilitated the examination of the effect of values on policy attitudes, it also implies conversely that the effect of values on policy attitudes is relatively little. In fact, some colleagues may

claim that the results of our analysis show that the contribution of family values in our prediction of maternal employment is mostly marginal compared to the impact of household income level or the level of family policy. Nonetheless, as with the examination of the ex-ante causal effect, the aim of our cultural analysis of social policy is not to argue that culture is the decisive determinant of social policy making but to contribute to the better understanding of social policy making. Given that policy attitudes are important influences on people's support for concrete policies, establishing that policy attitudes are partly dependent upon people's values is a first step toward more effective policy making. We believe that our findings are not as trivial as this might imply.

Meanwhile, our analysis was limited by a lack of information on mothers and their children. Future study on maternal employment and mothers' values requires more detailed data on the age of children, any leave schemes and benefits mothers have taken up, the availability of informal child care (e.g. grandparents) and so on. Beyond this, developing the study of individual take-up decisions will be critical when it comes to the examination of policy attitudes, especially, passive resistance.

CHAPTER EIGHT:

DISCUSSION

8.1 Introduction

Motivated by the relative lack of empirical support for the cultural explanation of social policy, this research has attempted to show cultural differences between welfare states and their impact on shaping diverse welfare arrangements across corresponding societies. In particular, through a critical review of the existing research on the relationship between culture and welfare we suggested that an 'in-between' level conception of cultural dimension – here, societal values - would be helpful for empirical examination of the effect of culture on social policy, enabling us to differentiate between the cultural context and public opinion in the conceptualisation of how culture affects social policy. Based on this, three hypotheses were constructed: cultural context affects public opinion; cultural context has an impact on social policy decisions; and cultural values influence individual policy attitudes. Drawing on the findings from this research, in this chapter we will discuss the validity of our suggestions, the results of the hypotheses testing and their implications.

8.2 Societal Values – Are they appropriate for conceptualising and measuring the cultural dimension in cultural analysis?

The most controversial aspect of this research is the introduction of the concept of 'societal values'. Above (Chapter 2) we introduced the welfare culture approach where it is assumed that culture and the social system are interrelated but not decisively determined by each other. Because of this adequate distance between culture and the social system (Archer, 1995, 1996 in Pfau-Effinger, 2004b: 39-42) the role of culture can be properly understood without being under- or over-estimated as the comprehensive, materialistic or idealistic approaches often do (van Oorschot, Opielka & Pfau-Effinger, 2008: 9-10) – although at the same time this distance naturally leads to

the admission that cultural dimensions are not the sole or decisive determinants of social policy (Deacon, 2002: 8; O'Connor & Robinson, 2008: 30; Pfau-Effinger, 2005: 11; van Oorschot & Halman, 2000: 21). Drawing on this approach, it can be argued that 'policy-makers act in an economic, political and cultural context' (van Oorschot, 2008: 268). In particular, it has been suggested that the logic of social policy making is different from 'democratic' and 'capitalistic' policy-making, in the sense that decisions should be based on values as well as majority voting and economic efficiency (Marshall, 1972: 20). According to this reasoning, we have suggested that the cultural context must be highly resistant to change in the economic and political context, since this is the very reason why culture can be another context for policy making. In other words, the cultural dimension forming the cultural context for policy making must be beliefs, attitudes and values which are embedded widely and deeply in society and quite stable over time (van Oorschot, 2006: 24).

However, the cultural dimension has mostly been conceptualised either at the abstract level (e.g. Hagenaars, Halman & Moors, 2003; Hofstede, 2001; Inglehart, 1977, 1990; Lockhart, 2001; O'Connor & Robinson, 2008; Opielka, 2008; Schwartz, 1994a, 1999; Stjernø, 2008; van Kersbergen, 1995) where culture plays the role of a general and foundational factor for the entire society (Inglehart, 1990: 3-4) or at the concrete level where cultural dimensions are found within opinions and attitudes which are quite issue- and situation-dependent (e.g. Andreβ & Heien, 2001; Arts & Gelissen, 2001; Blekesaune & Quadagno, 2003; Heinemann, 2007; Svallfors, 1997; van Oorschot & Arts, 2005; van Oorschot, Arts & Halman, 2005; van Oorschot & Halman, 2000). In the former case, whilst culture is seen to be able to (partly) explain the origins of both institutional differences and personal preferences, these explanations have inevitably been somewhat abstract (historical). At the same time, since the distinctiveness of the cultural context of each society is understood with only one or two dimensions, the complexity of the real world cannot be sufficiently reflected (Lockhart, 2001: 227-228). In the latter case, the inconsistency of public opinions and attitudes that depend on 'the immediate surrounding socio-economic conditions' (Gelissen, 2008: 247) has made it difficult to claim a causal effect, although studies based on this conceptualisation have greatly

contributed to the examination of welfare attitudes and their determinants. To put it briefly, most conceptions of culture in the previous studies have not been independent of the economic and political contexts of society – they have existed at either the higher level (as a determinant of current economic and political contexts) or the lower level (as being affected by economic and political contexts), and they have not greatly facilitated the empirical cultural analysis of social policy.

Given these considerations, we start from the premise that the cultural context is the national cultural characteristics surrounding national social policy making, which are widely and deeply embedded in society and stable over time, and not especially influenced by the economic and political contexts. We then introduce the concept of societal values as an in-between level cultural dimension by drawing on Haller's differentiation (2002) between universal, societal and situational values.

This distinction between universal, societal and situational values is contestable however – the border line between each is not clear but blurred both conceptually and empirically. For example, whilst the universal values appear to be clearly different conceptually, it is hard to grasp the distinctiveness of societal and situational values in Haller's explanation (2002: 143) which states that societal values are 'valid in a specific societal context' whilst situational values are related to 'specific circumstances' (2002: 143). In empirical measurement too, there is no clear-cut distinction between universal values and societal values, unless a survey is designed and developed exclusively for exploring the universal basic human values (e.g. Schwartz's values survey). If we take Hagenaars and his colleagues' exploration of the European values map (Hagenaars, Halman & Moors, 2003) as an example, it is not clear whether their 40 value-indices, which were mostly constructed by abstracting (factor analysis) underlying dimensions from a set of variables, are 'societal' values, or whether the two dimensions obtained by further abstraction of these 40 indices are 'universal' values. These two differing level dimensions are based on the same information from the same dataset and only differ in terms of how much abstracted the variables are. As we have seen above, in our analysis too societal values and situational values are differentiated only by looking at how stable

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over time they are – yet it is also possible to claim that there are 'stable' situational values and 'unstable' societal values.

The validity of the concept of societal values in this research is therefore reliant on empirical results. Our findings on the cultural characteristics of 22 societies (Chapter 5) corroborate many previous studies' findings and common knowledge. For example, the declining trend in the religiosity of most Western welfare states has been reported (Halman, 1996: 199-202) and is found again here. Likewise higher levels of religiosity in the US, Ireland and Italy are also found in this research. As it is reported in the literature (Chesnais, 1996 in Brewster & Rindfuss, 2000), 'nations of families' show higher levels of traditional family values than 'nations of individuals'. Within our results the levels of religiosity and legal permissiveness in society are negatively correlated, thus corroborating the findings of Alm and Torgler (2006) that tax morale is positively correlated with religiosity and the frequency of church attendance. Interestingly, the four welfare regimes commonly suggested in the literature can be broadly characterised with our societal values such as 'the Religious Individual (the Liberal)', 'the Secularised Collective (the Conservative)', 'the Secularised Individual (the Social Democratic)' and 'the Religious Collective (the Latin-Southern)' regimes – showing that different welfare regimes reflect cultural differences to a certain degree as is widely assumed. At the same time, examples of societal values we extracted meet the requirements for the cultural context suggested by our conceptualisation – they are all 'dynamically stable', that is, 'permanent enough to' enable us to predict consequences (Oyserman & Uskul, 2008: 149-150) and correlated with economic and political factors only weakly.

From this empirical perspective, the concept of societal values appears to be fruitful for the examination of cultural explanations of social policy. Of course, societal values may not be the cultural dimension 'most suitable' for the cultural analysis of social policy. For example, as we saw above (Chapter 2) the cultural foundation of welfare, which is very critical to an understanding of the development of the welfare states, cannot be properly examined without looking at ideological traditions and trends at historical moments – societal values cannot contribute greatly in these kind inquiries. However,

returning to the original question, cultural explanations of social policy have suffered from a lack of empirical evidence proving a direct and clear causal link between the cultural context and decision making. This gap in the literature has not been filled by the abstract and historical accounts or by the examination of unstable welfare attitudes. Given that the empirical study of the cultural explanation has necessitated introducing different level conceptions of cultural dimensions, the concept of societal values has shown that it can serve this purpose by producing rather fruitful empirical results.

8.3 Cultural Context but Public Opinion?

By differentiating between societal values and situational values, we have reconstructed the conceptualisation of the way culture affects social policy – while accepting the impact of public opinion on policy making as well as public support for policy suggested in the existing studies, we separated culture (the cultural context) from public opinion. In our conceptualisation, public opinion plays a role as a mediator between the cultural context and social policy (or policy makers), which also reflects other factors such as the interest dimension. This enables us to detach instability (vulnerability to situations) and dependency upon the effect of policy feedback (e.g. see Skocpol & Amenta, 1986: 149-151) from the cultural dimension when examining the causal effect of culture on social policy. We can therefore argue for the impact of culture in spite of potentially fluctuating public opinion and policy attitudes.

However, some may contest this conceptualisation. Firstly, it might be questioned how we can differentiate public opinion/attitudes from the cultural dimension. Basically, this was already dealt with in the previous section where we discussed differentiating between the universal, societal and situational values. In addition, what we suggest is not that public opinion and public attitudes do not show the cultural dimension but that these situational values cannot be a proper proxy for the cultural context since the cultural dimension is not exclusively reflected in these, if not less reflected than other situational factors. That is, if culture is a multifaceted concept and we can assume different layers

of culture, in examining the cultural context for social policy, which should be placed on the same level with the economic and political context, public opinion is not an appropriate layer of culture, although public opinion is a subject important in its own right.

Secondly, critics may claim that the effect of culture is nebulous given that public opinion is situation dependent and wildly fluctuating, even if the cultural context is quite stable over time. We have assumed in this research that the cultural context has an impact on specific social policies by affecting all public opinions on various but relevant issues. In other words, whilst public opinion on each issue varies across time and situations, we assume that the impact of cultural context on policy making through all public opinions on issues surrounding one particular policy would not seesaw wildly. The examination of the relationship between the cultural context and social policy decisions with omitted but implicit reference to 'in-between' public opinions (Chapter 6) is based on this assumption. While this causal link is not strictly speaking a direct one, a perfectly immediate explanation for any contextual factor would be impossible. The results quite clearly showing the effects of cultural context in this research, which have not often been reported, provide further support for this reasoning.

8.4 Culturally Coloured Social Policy?

Discussion about our findings and their implications can be separated into two parts. The first part is the interpretation of the findings of our examination of the ex-ante causal effect of culture on social policy, which has revolved around two hypotheses. We will briefly present the main findings and immediate explanations for these findings by each hypothesis, and drawing on these, discuss the implications.

Hypothesis 1: the cultural context affects public opinion

We found that the cultural context matters in public opinion on welfare - especially welfare opinions relevant to the answer to the question of 'why' and 'who' in terms of

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'who should get what and why'. Public opinion on the cause of poverty and the public attitudes toward policy support for the unemployed were found to be rather strongly dependent upon the levels of societal values of the corresponding society. For example, it was found that the levels of religiosity and traditional ethical values are closely related to the victim blaming poverty perception of the public, as is tolerance to public attitudes toward support for the unemployed. In addition, whilst the higher economic growth level and unemployment rate was related to positive opinions on welfare, the impact of both the party composition of government and the welfare regime was marginal.

These results imply that, as Aalberg suggests (2003: 5-8), people apply their values - ideas of what are desirable – to concrete situations and policies to judge the way in which specific policies and situations move on. Arguably, public opinion on welfare – particularly in the examples used in this research - is highly judgemental and affected by the value-characteristics of a society (cultural context) to a considerable degree. However, this does not mean to say that the impact of cultural context on welfare attitudes will invariably be decisive. As situational values, welfare attitudes will fluctuate according to situations. For example, the impact of economic growth rates on welfare attitudes in the results partially implies this.

Whilst it has been suggested by some studies (Arts, Halman & van Oorschot, 2003: 299; van Oorschot, 2006; 2008: 274, 283) that more religious 'individuals' tend to be more solidaristic with needy people, our finding is that a more religious 'public' is more likely to see the cause of poverty in terms of individual attributes. These are not necessarily incompatible findings – an emphasis both on the work-ethic (individual responsibility) and 'loving thy neighbour' is possible. The public with stronger traditional ethical values would not favour blaming society for poverty in that the continuity of society and preserving the existing social order tend to be emphasised by these values. The needy would not be less differentiated (and less blamed) in a more tolerant society since, as it has been widely suggested, tolerance can provide the basis for social solidarity, cooperation and social cohesion by enabling people to widen their 'shared identity' (Arts & Gelissen, 2001: 285).

Contradictory findings have been reported about the influence of the unemployment rate on welfare attitudes – because of the 'empathy' effect (Blekesaune & Quadagno, 2003: 421-423; Gelissen, 2008: 256-259) and the 'national burden effect' (van Oorschot, Arts & Halman, 2005: 49). In the results of this research, the 'empathy' effect was present but faded away by controlling for the level of tolerance. Given that the research arguing for the 'national burden effect' (van Oorschot, Arts & Halman, 2005) included the level of 'social capital' in its analysis, it seems more likely to be the 'burden effect' which is generated by the unemployment rate than the 'empathy effect' if the cultural context is the same. The fact that the effect of both the party composition of government and the welfare regime faded away by controlling the cultural context implies that, supporting van Oorschot and Halman (2000) and challenging Larsen (2006), the difference in institutional arrangements does not have a strong impact on welfare attitudes which are, as situational values, dependent upon issues and situations – possibly, in judging a situation (situational values), criteria (values) and other situations (e.g. economic factors) are more important than institutions.

The fact that we chose examples of public opinion more relevant to the basic welfare question of 'who should get what and why' might have caused us to find this pronounced link between culture and welfare attitudes. Nevertheless, the fact that our examples were related to such key underlying issues does not detract from our findings. Public opinion on these issues is particularly critical in welfare policy making in that the public perception of the cause of poverty is related to the 'legitimacy of social and economic inequality' which is one of the foundational factors for deciding the level of social welfare (Lepianka, van Oorschot & Gelissen, 2009: 421-422; van Oorschot & Halman, 2000: 2-3). Public opinion on support for the unemployed is also critical in welfare policy making, since welfare provision for this group is one of the most controversial issues and people tend to see the unemployed as less deserving than other needy groups (Blekesaune & Quadagno, 2003: 424; van Oorschot, 2000, 2006; van Oorschot, Arts & Halman, 2005). In other words, the significance of the effect of the

cultural context for social policy making is more clearly implied by these examples of public opinion on 'critical' welfare issues.

Hypothesis 2: the cultural context has an impact on social policy decisions

It was found that the cultural context matters in welfare decisions - especially social policy decisions relevant to the question of 'what' and 'who' in terms of 'who should get what and why'. The level of welfare generosity and the proportion of the total welfare budget allocated to unemployment were found to be substantially dependent upon the difference in the cultural context. In particular, within our analysis, the levels of religiosity and tolerance of societies were seen to be more relevant to the level of welfare generosity, as were the levels of optimism and tolerance to the proportion of the welfare budget allocated to unemployment. In addition, as expected, it was found that left-wing governments in countries were likely to offer more generous welfare and that higher unemployment rates tend to lead to the allocation of a larger proportion of the welfare budget to unemployment.

Yet as expected, the impact of cultural context on the level of welfare effort (spending) was found to be marginal – only the level of legal permissiveness appeared to matter implying that there could be stronger resistance to welfare spending where less transparency and fairness in taxation and claiming benefits were expected. Nevertheless, this decision would be mostly circumscribed by the institutional settings and economic situations, as implied by the result where the unemployment rate was positively related to the level of social spending. In addition, the Social Democratic and the Conservative regime countries are likely to spend more on social welfare than the Liberal regime countries. As for the welfare generosity level, if religiosity is related to the individualistic approach to poverty, as we saw in the analysis of public opinion, institutionalised solidarity (welfare provision) and institutionalised collective responsibility may not be popular in a more religious society. Conversely, given that tolerance is the basis of solidarity, generous welfare programmes will be supported in societies with higher tolerance levels.

Given that the welfare policy priorities – how much of the welfare budget should be spent and where (or on whom) – are not only moral but also political decisions, it is understandable that the total unemployment rate is the driving force behind the allocation of a greater portion of the welfare budget to unemployment. When and where there are more unemployed people, welfare demands by the unemployed increase and become more crucial to the social and political agenda, which leads to more spending on unemployment policies. However, the level of economic growth had no relevance to allocating a larger part of the total welfare budget to unemployment implying that, as we discussed before, welfare for the unemployed is not an unconditional matter in society – solidarity with the unemployed is more conditional, at least amongst European people (van Oorschot, 2006).

Why is unemployment more prioritised between welfare areas in societies where stronger optimism is embedded? Given that optimism is related to the individualistic perspective, including an emphasis on autonomy and individual responsibility, and that a total sum is given and must be distributed, more optimistic societies favour individual-oriented welfare areas such as unemployment over more collectively-oriented areas such as health and education, while they are likely to spend less on welfare (institutionalised collective responsibility) in general. Conversely, for example, societies with stronger traditional ethical values may prefer to prioritise welfare for groups historically regarded as more deserving such as the elderly, the disabled and the sick (van Oorschot, 2006: 25) rather than the unemployed, although this was presented only weakly in our analysis.

On the whole, our findings suggest that the varying cultural context across the welfare states shapes, at least partially, social policy in each society. Given that policy makers listen to public opinion, the cultural characteristics of society will inevitably be reflected in policy decisions. Even if public opinion is also affected by, say, economic conditions and political strategic agenda-pushing, we argue that the impact of the cultural context on public opinion is critical since the opinion-forming process refers to values. In particular, we have seen that public opinion on key welfare issues is significantly

influenced by the cultural values deeply embedded in a society. Thus, for example, we argue that the welfare policy priority given to unemployment in the Latin-Southern welfare regime when compared to other welfare regimes is partly accounted for by the cultural characteristics of countries where support for the employment of male-breadwinners has been emphasised (Boeri, Börsch-Supan & Tabellini, 2001: 12).

Turning to the welfare culture approach (Pfau-Effinger, 2005) upon which we draw for our theoretical framework for understanding the relationship between culture and social policy, we argue that our conceptualisation and examination based on the idea of differentiating cultural values and public opinion is not only suitable for this theory but also contributes to developing this approach further. While allowing a distance between culture and social system, which help us understand the role played by culture in welfare policy making properly and without under- or over-estimation, the process of how culture realises its impact on policy making (through social actors' ideas) is still abstract, too simple, political elite-dependent or at least hard to test empirically. In this research, while the cultural context remains in the area of culture, public opinion which is more tangible not only conceptually but also empirically is playing the role of mediator between culture and social policy making, and this greatly facilitated our empirical examination.

However, as we discussed above, this distance between the cultural system and the social system inevitably presumes that the role of culture in social policy making is limited (Deacon, 2002: 8; O'Connor & Robinson, 2008: 30; Pfau-Effinger, 2005: 11; van Oorschot & Halman, 2000: 21). Given that public opinion reflects not only culture but also other social, economic and political conditions and there is another compromising process by policy makers, we should admit that the effect of culture on social policy making is relatively marginal – although we argue that public opinion is quite strongly determined by the cultural context. Is it that social policy is culturally coloured rather than culturally shaped, therefore?

8.5 Or More? Cultural Analysis in the Era of Welfare Change

Our discussion about the implications of cultural analysis can be progressed by considering the findings on the ex-post effect of culture, which was examined with the third hypothesis.

Hypothesis 3: the societal values influence individual policy attitudes

We found that mothers with stronger traditional family values were less likely to work and this was the case in both the early 1980s and the late 1990s data sets. In particular, mothers with children under the school-age whose employment is strongly supported by family policy tend to refer to their traditional family values when making decisions to work, although socio-economic factors such as whether they are the chief earners of their households and their household's income level are generally more influential than family values on mothers' working decisions. It is not surprising that mothers are more likely to work when they are the bread-winners of their households. The strong impact of the income level on their working decisions indicates that the opportunity cost of not-working is greater for higher income earner mothers.

Family policy appears to work - mothers with young children living in countries where their employment is strongly backed up are more likely to work than those in countries moderately and weakly supporting maternal employment, implying that it is harder for mothers to reconcile parenting and working where their participation in the labour market is only weakly and moderately supported. At the same time, the finding that the effect of family values on mothers' working decisions is clearer where maternal employment is more strongly supported implies that their 'take-up' of family policy support is partly dependent upon family values. Given that mothers' working means they will partly but inevitably take up the support provided by family policy such as leave schemes and public child care within societies with a strong family policy effort, the impact of family values on their working status will also partly reflect the fact that individual take-up decisions are influenced by traditional family values. As we discussed

before, if individual take-up decisions show policy attitudes toward a policy, especially in the case of passive resistance, values must therefore matter in individual policy attitudes.

As it can be seen from this finding, when people's policy attitudes are linked to their take-up decisions, the ex-post effect of culture has more pragmatic implications for social policy making. Given that the take-up/user rate is (partly) about the efficient use of welfare resources, more 'effective' policy making necessitates means being sensitive to the values of policy recipients/users. For example, we suggested that the shape of family policy or the elderly care services needs to be diversified according to the levels of traditional family values amongst the expected policy users. In this respect, the ex-post effect of culture has a causal impact on social policy making if we see the whole policy process.

The significance of culture in social policy analysis is not revealed clearly until both the ex-ante and ex-post effect of culture is taken into consideration. Cultural preference is not just something policy makers use to 'decorate' social policy in order to win applause from the public, but a slow and steady force backing up change (innovation) in social policy by partially deciding the fate of concrete policies. In particular, culture as a determinant of welfare change would attract wider attention given that now is the time of 'welfare adjustment' (Ellison & Pierson, 2003: 1).

According to Ellison, who has closely observed and explained the welfare change in theory (1999) as well as in practice not only in a national (1998; Ellison & Pierson, 2003) but also in an international context (2006), although the welfare crisis was ignited and has been strongly driven by the movements in the international economy such as the collapse of the fixed exchange rates system, the oil price shock and more recently globalisation, what we have been seeing is not the convergence but divergence of welfare because social policies are mostly 'national' systems created by domestic policy making which is sensitive to endogenous issues and interpreting the global pressure

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differently (Ellison & Pierson, 2003: 3-5). That is, social policy change is shaped by the national context arguably including cultural context.

In theory too (Ellison, 1999) the 'universalist approach' – (paternalistic state) welfare for universal goals such as 'the rights of social citizenship' (Marshall, 1992 [1950]) or solidaristic social integration (Titmuss, 1963, in Ellison, 1999: 57-58), which was 'a founding principle of modern welfare theory' in the post-war period, has been challenged since the 1980s. Sceptics argue that 'universalism further marginalised the already marginal' because it did not sufficiently recognise the diversity of identity and differences in need (Williams, 1992: 206-7, in ibid: 59), and as a result, left the unequal power relations that influence the pursuit of interests relatively untouched (Young, 1989, in ibid: 59). Now welfare theory is beginning to go beyond acknowledging 'the differences among particular cases' and to engage in the permanent process of constructing and reconstructing the resource allocation principles and concepts of welfare (e.g. what is social inclusion). This can be done, as Ellison suggests, through 'extensive processes of deliberation' (Ellison, 1999: 71). In the discussion above (Chapter 2) we saw how the welfare crisis brought culture back to the centre of welfare – the new scarcity collapsed the post-war consensus on 'who should get what and why'. In the same way understanding value differences across different groups will be the basis for any new agreement reached about the welfare arrangement, which will have to adequately reflect diversity and differences if it is to last. In this respect, understanding the role of culture in social policy making can contribute to our understanding of as well as our ability to predict the nature and path of welfare change. Here we see the implications of cultural analysis beyond the culturally coloured social policy.

8.6 Chapter Concluding Remarks

In this research, we attempted to support the development of theorising the relationship between culture and social policy, to which the increasing attention has recently been paid within the school of social policy, by adding empirical evidence. While our introduction of

the concept of societal values and the idea of differentiating between the cultural context and public opinion is debatable, it is an attempt not only to reflect state-of-the-art theoretical discussion in the empirical examination but also to diversify our approaches if the existing approaches have not been much helpful. It was found that this could facilitate the cultural analysis of welfare, providing the relatively more fruitful findings in this research – culture does, not decisively but evidently, shape welfare. Given that the significance of the national context has been more emphasised in spite of globalisation, or ironically because of globalisation, and that not only differences between nation states but also between groups and individuals have become more and more important in the post-modernist society (Ellison, 1999; Ellison & Pierson, 2003), it is expected that the cultural analysis substantially contributes to our insight into welfare and its change.

CHAPTER NINE:

CONCLUSION

In this final chapter we are going to begin by reviewing our own research. This will involve looking back on the question we asked ourselves at the start of this research. We will review what we have found, how we answered our questions, what we can claim to have contributed to the field, as well as what the limitations and implications of this research are - not only for future researchers but also in terms of practical policy making.

9.1 Culture Matters in Social Policy, Empirically

We initiated this research in the introduction by looking at the lack of empirical evidence for the cultural explanation of welfare, in spite of the increasing need for an understanding of the relationship between culture and social policy. Conceptually, it has been suggested that the cultural dimension is critical to welfare (Rustin, 1999: 257) given that social policy is fundamentally about asking, 'what is the good society' (Deacon, 2002: 1; Titmuss, 1974: 49; van Oorschot, Opielka & Pfau-Effinger, 2008: 2), and practically, 'who should get what and why' (e.g. van Oorschot, 2000). However, the influence of culture on social policy has mostly been examined either historically at the very abstract level, or empirically but not always successfully at the very concrete level. The cultural foundations of social policy have been explored by the former, yet the causal impact of culture specified is abstract (historical). The public attitudes toward welfare policy have been examined by the latter approach, yet these public attitudes are inherently unstable and more likely to be a dependent variable of rather than independent variable for social policy. While policies are made within an economic, political and cultural context (van Oorschot, 2008: 268), the empirical evidence for the effect of culture as a context for social policy making has not been sufficiently explored. In this research, the aim was to contribute to filling this gap between the developed theoretical discussion and underdeveloped empirical support. That is, answering the

question, "does culture matter in social policy, empirically?" was the purpose and task of this research.

Drawing on the literature (e.g. Alcock, 2001: 16; Cnaan et al, 1993: 124; Pfau-Effinger, 2005: 6; Stewart, 2006: 186; van Oorschot, 2006: 24; 2007: 134-135) we conceptualised the effect of culture as twofold: the ex-ante causal effect by setting and limiting policy agendas and policy options; and the ex-post legitimacy control effect by offering or withholding support for a concrete policy. The empirical examination of this twofold effect of culture was much facilitated by introducing the concept of 'societal values' (Haller, 2002: 143). Review of prominent theoretical arguments and empirical works suggested that this 'in-between' level cultural dimension would prove more fruitful for the empirical examination of the relationship between culture and welfare than either abstract level (i.e. ideological and cultural foundations of welfare) or the concrete level (i.e. welfare attitudes) cultural dimensions on which most existing studies had focused. It was hypothesised that the cultural context of society would affect public opinions on welfare issues, and through this, influence social policy making. It was assumed that cultural values would affect individual attitudes toward concrete policies, and through this, influence the level of public support for a policy as well as take-up and user rates, both of which are critical to the fate of a policy.

In our data analysis, the so-called (Western) welfare states showed variation in their cultural contexts, which echoed the existing findings (see Section 8.2), and this variation revealed its impact on public opinions about welfare issues and on welfare policy decisions. Public opinion on the cause of poverty and public attitudes toward policy support for the unemployed are rather strongly dependent upon the levels of societal values of the corresponding society within our data. It is suggested that the cultural context has an influence on social policy making - given that policy makers would listen to public opinions when making decisions and that our measure of cultural context is stable over time and shows a rather strong impact on public opinions especially relevant to welfare policy making. In fact, the social policy decisions of a society are found to be influenced by the cultural context in our analysis. It is found that the level of welfare

generosity and welfare policy priorities in terms of the proportion of the welfare budget allocated to different groups and areas are partly predictable by differences in the cultural context.

It is also suggested that individual policy attitudes toward concrete policies are partly dependent upon the societal values that individuals hold. Our data shows that mothers with children under the age of 5, whose participation in the labour market is strongly supported by family policy, are likely to refer to their traditional family values in making decisions to work. This implies that their attitudes toward family policy are partly dependent upon their family values, since their decisions to reconcile working and parenting would somehow mean their take-up of supports provided by family policy – for example, leave schemes and public child care. In fact, this corroborates the findings of studies by both Pfau-Effinger (2004b: 100) that the take-up of parental leave scheme depends more on 'motherhood culture' than types of schemes and by Duncan and Irwin (2004: 397, in Taylor-Gooby, 2008: 179-180) that mothers tend to consider moral and social norms when they take decisions about reconciling working and parenting. As a result, our answer to the initial question is that culture matters in social policy not only theoretically but also empirically.

9.2 Is the Cultural Analysis of Welfare Enriched?

On the whole, by verifying and supporting our hypotheses, this research shows empirically that culture matters in social policy making. Although culture is an increasingly popular topic within the school of social policy analysis, there has been a relative lack of empirical studies about the effect of culture on social policy making (van Oorschot, 2007). So far, differences in social policy across countries have been explained mainly by class struggles (e.g. Baldwin, 1992), social and political institutions (e.g. Immergut, 1990) and ideological traditions (e.g. Lockhart, 2001). The relevance of the distinct characteristics of national cultures to social policy has been suspected but rarely explored empirically. This research provides empirical evidence not only for the

variance of social values across societies but also the causal effect of such value-differences on social policy.

In particular, as it was discussed in the previous chapter, the cultural analysis of welfare is expected to benefit from the twofold conceptualisation of the way culture affects social policy. Although this is not a new suggestion (e.g. see van Oorschot, 2007: 134-135), it has rarely been conceptualised and examined in a clear and coherent manner. By differentiating between the cultural context and public opinion, we were able to conceptualise and hypothesise in more a tangible and testable way. As a result, both the ex-ante causal effect and the ex-post legitimacy control effect can be clearly inferred from this research. As well as facilitating the empirical examination, this twofold conception also helped us to see the effect of culture on welfare not from a certain point of the policy process but from a broader view considering the whole policy process. This was in turn helpful for identifying the implications of cultural analysis for the study of welfare. Therefore, on the one hand, it is suggested that the cultural analysis of welfare can be consolidated and enriched by the twofold approach to the effect of culture; on the other hand, that a new conception of the cultural dimension lying somewhere between the abstract level and the concrete level, which have individually but separately dominated the existing cultural study of social policy, is both possible and ultimately more fruitful.

Meanwhile, we critically and empirically reviewed some of the variables of the cultural dimension within the existing research, for example, the level of egalitarianism in society measured by one survey item, which are potentially problematic in terms of their stability and comparability. An unstable measure of the cultural dimension is hardly a strong predictor of attitudes toward an issue. If a measure of the cultural dimension is not comparable across countries, a valid comparison cannot be conducted. Moreover, we found some notions have changed over time even within a society – in comparative studies dealing with the cultural dimension not only stability but also comparability across time as well as place need to be tested. The importance of this was taken into

consideration and a method for testing the stability and comparability of the cultural dimension was introduced in this research.

In addition, following the recent few studies focusing on policy recipients' values (e.g. Pfau-Effinger, 2004b; Taylor-Gooby, 2008; Taylor-Gooby & Wallace, 2009), we linked policy users' values to their policy attitudes in order to examine the ex-post effect of culture. It is expected that this attempt will contribute to widening the subject areas of the cultural analysis of welfare. The study of 'take-up' has so far been dominated by the economist perspectives which attempt to explain take-up decisions with the concept of 'cost' (e.g. potential benefits and hidden costs). The concept of 'passive resistance', which we introduced in order to show the aspect of negative policy attitudes reflected in policy recipients' non-take-up decisions, may also attract attention to some degree of students in benefit/service take-up studies and cultural studies of welfare.

9.3 Limitations

Several objections to our methods as well as our interpretations of the findings will most probably be raised. First and foremost, we have to admit that our quantification of a very qualitative subject – culture – which is inherently historical is unlikely to be universally accepted. Some may be rightly and fundamentally sceptical about measuring value dimensions through survey methods (Reisinger, 1995: 332-342), whilst others will argue for the advantages of mass survey in studying values cross-nationally and inter-generationally, especially with the huge number of cases, representativeness of samples and the cancelling-out effect of random error (Inglehart, 1990: 130-131). In fact, we do not stand alone – examples of studying the cultural dimension through massive scale survey data are now found across disciplines such as psychology (e.g. Schwartz & Bardi, 2001), sociology (e.g. Halman & Draulans, 2006), criminology (e.g. Halpern, 2001), political culture (e.g. Inglehart & Welzel, 2005), social capital (e.g. Patulny, 2004) and social policy analysis (e.g. van Oorschot, 2008). Nonetheless, the validity of our measure of differences in cultural context between societies in terms of value-difference

can be strengthened and needs to be complemented by the study of history (Hofstede, 2001: 12).

The value differences across countries we have examined are far from exhaustive. Our six societal values do not cover all aspects of people's values. Firstly, there is much more information in the dataset we analysed. We have extracted only the relatively more comparable and stable value dimensions. Secondly, we have seen only a few value dimensions but there could be many other value dimensions outside the dataset. If people's values function simultaneously in all perceptions and judgements since people do "not necessarily seek to maximise one particular value" but may trade off (Taylor-Gooby, 2008: 172), we need to know all the kinds of societal values to examine the effect of the cultural context including the interactive effect between values – but, we do not know how many societal values there are. Therefore, generalisation of the impact of each societal value is limited – it might differ by interaction or trade-off effect if we have more examples of societal values. Nevertheless, this would not appear to seriously challenge the finding that culture matters. Finally, there are far more societies than the 22 OECD countries examined here - although our selection was to minimise the impact of differing levels of economic development. We need to assume that there will be systematically different patterns in the relationship between culture and social policy outside the advanced welfare capitalistic world.

As we discussed above (Chapter 6), our aggregated level analyses have suffered from the relatively small number of cases, especially the analysis of public opinions. On the one hand, we explained how the ecological level analysis using the mean scores of countries can be conducted with a smaller number of cases than conventional standards because of the effect of aggregation reducing random fluctuation of individual level data (van de Vijver, van Hemert & Poortinga, 2008: 16, 420). On the other hand, we attempted to ensure robust results by, for example, sensitivity analysis. Even though there may be concerns about the robustness of our results, such as the inflated predicting ability of a regression model, it would seem that we can nevertheless argue without exaggeration that public opinions and welfare policy decisions are at least partly

dependent upon the cultural context of society. Generally, it is expected that the issue of small-N, which is rather a common problem within comparative welfare studies, will improve over time as surveys are continued and developed.

Meanwhile, our individual level analysis has been limited by the lack of data on 'take-up' of welfare policies as well as the lack of information on mothers as policy recipients of family policy in our available dataset. With the limited information available we have attempted to 'estimate' mothers' take-up decisions of and attitudes toward supports provided by family policy by using their working status as a surrogate, but this estimation is logically defective – unless we can include all the factors influencing their working decisions. Nonetheless, the working status of mothers, particularly those who are living with children under the school age, is itself a meaningful subject to examine in relation to the effectiveness of family policy. Regarding this, even without our logical assumptions about 'take-up' decisions, if mothers' family values matter to their participation in the labour market, the same suggestion can be inferred about their attitudes toward family policy, which will be partly dependent upon the level of their traditional family values. Here again, the examination of individual policy attitudes and the impact of their values is expected to benefit from the development of take-up studies and data.

9.4 Advancing Cultural Analysis

First of all, given that the question asked and answered in this research was whether culture matters in social policy, the findings also have implications for the key issue in the cultural analysis of social policy, that is 'how' culture matters. Although we have dealt with this issue while examining whether culture matters, we did so only in a general way – we need to understand the details of how culture affects social policy. This necessitates research from a different approach, with more specified policy examples as well as cases. For example, a comparative case study focusing on a few countries with a policy example based on similar policy goals could be expected to

provide a more detailed understanding of how certain cultural characteristics matter at different stages of the policy process – from the social debate stage through the policy decision stage to the policy enforcement stage. This kind of research would necessarily be somewhat historical, as it was suggested in the discussion of the limitations. It is also expected that such case-oriented historical studies would contribute to our understanding of the distinctive cultural characteristics of societies found in this research – such as the higher levels of legal permissiveness in France and Belgium or the rapid but isolated changes to Finnish values.

From another point of view, we still need to examine the cultural context further at the cross-country level. This remains understudied and will not be greatly changed by our research alone. In addition, the cultural characteristics of each society in terms of the collective forms of societal values deeply embedded in society have not often been explored. Within social policy analysis at least, much is still not known about the cultural context for social policy making and given that its (albeit gradual) changeability, further exploration of this cultural context is also important for predicting the direction of welfare change.

In the meantime, we may need to extend subject policy areas, subject countries and subject levels (such as to the regional level and the EU level). This would not only add to the empirical evidence base for the cultural explanation of welfare but could also contribute to the design of appropriate social policy reform and innovation in either regional, national or international governments/organisations or industrialised, developing or underdeveloped countries.

9.5 Advancing Practical Policy Making

Now we are going to close this thesis by asking ourselves one last question: "culture matters, so what?" Social policy is, by nature, not only an academic study but also social action in the real world (Alcock, 2008: 3). In this sense, studies of social policy have a

duty to consider the practical implications of their findings for the real world – especially policy-making.

Social policies can and need to take the cultural context of society more seriously. As we have seen in this research, the legitimacy of a policy measured by the level of public support as well as effectiveness by take-up or user rates can be different across societies with differing value-characteristics. The pursuit of the same policy goal cannot be achieved at the same level if the same shape of policy is applied to different cultures. Policy-makers need to be informed of the cultural characteristics of their societies, the dominant values of the public and the values of policy target groups. In some respects, this is now occurring in many welfare states where welfare reform is being discussed and taking place. For example, it is reported that employment policy reform in Germany has been circumscribed by its cultural traditions favouring the family and voluntary sectors in welfare provision by the subsidiarity principle (Pfau-Effinger, 2005: 15). Yet this example also implies that welfare policies attempting to reflect culture more actively and intentionally will be more popular and effective. Furthermore, the significance of the cultural dimension in social policy making is expected to increase given that contemporary social politics are being asked to recognise and meet more and more diversified needs for welfare. At the same time, 'hearing from culture' can also help improve policy learning. For example, a 'successful' policy transferred from one society seems unlikely to succeed in another where a different cultural context exists (Heinemann, 2007: 28). Here as well, policy makers need to be informed of the cultural context of their societies.

The increasing attention paid to culture within social policy analysis is a necessary reaction in an era of welfare reform and retrenchment, when the basic welfare moral question of 'who should get what and why' comes back to the fore (van Oorschot, 2000) and public opinion is heard more eagerly by 'blame avoidance' rather than 'credit claiming' politics (Pierson, 1996). Culture can be a slow and steady force backing up change (innovation) in social policy. It is therefore imperative that we continue to explore its influence, given that 'culture matters'.

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