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European welfare regimes in comparison

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Abstract

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Using survey data (ESS3), this study analyses how well-being is distributed across the social structure in European welfare regimes. Four indicators of well-being were chosen for multilevel analyses: economic hardship, sickness, societal pessimism and social recognition. The results mostly show that well-being is to a significant extent conditioned by the position one occupies in the social structure and by the welfare regime one lives in. The distribution of life chances across the social structure varies between country groups due to different approaches to welfare policy. The Eastern European regime is generally characterised by relatively frequent ill-being on almost all dimensions included in the analysis. Economic hardship is prevalent in these nations, especially among the unemployed. In fact, unemployment is a major risk factor for economic hardship in all regimes. The Nordic regime is distinguished by low rates of ill-being in virtually all dimensions, but the relatively high sickness rate is an exception: poverty in particular exposes to sickness in the Nordic world of welfare. The link between vulnerability and societal pessimism is rather typical for both the Eastern European and Continental European regimes. Poverty makes future views bleaker in almost all country groups, whereas immigrants are generally less pessimistic. However, in the Nordic regime an immigration background seems to be, to some extent, an adverse factor as regards well-being. Poverty, unemployment and loneliness are associated with low recognition. Living in the liberal welfare regime and being poor or unemployed is the combination that most severely exposes its occupant to the demoralising experiences of low recognition. Welfare regimes are more than just systems of benefit allocation and service production – culture matters as well.

Key words: well-being, welfare state, poverty, unemployment, respect, social exclusion, social indicators, Europe

Tiivistelmä

Kemppainen T. **Hyvinvointi sosiopoliittisessa kontekstissa. Eurooppalaiset hyvinvointiregiimit vertailussa.** Helsinki: Kela, Sosiaali- ja terveysturvan tutkimuksia 123, 2012. 93 s. ISBN 978-951-669-900-7 (nid.), ISBN 978-951-669-901-4 (pdf).

Tutkimuksessa tarkastellaan kyselyaineiston (ESS3) avulla hyvinvoinnin jakautumista sosiaaliseen aseman perusteella eurooppalaisissa hyvinvointiregiimeissä. Hyvinvointia lähestytään monitasoanalyysin keinoin neljän indikaattorin näkökulmasta: taloudellinen niukkuus, sairaus, yhteiskunnallinen pessimismi ja sosiaalinen arvostus. Tulosten mukaan hyvinvointi on merkittävässä määrin riippuvainen yksilön yhteiskunnallisesta asemasta ja hyvinvointiregiimistä. Hyvinvoinnin edellytysten jakautuminen yhteiskunnallisessa rakenteessa vaihtelee maaryhmien välillä niiden hyvinvointipoliittisen mallin mukaisesti. Itäisen Euroopan maissa hyvinvointivajeet ovat yleisiä lähes kaikilla tarkastelluilla indikaattoreilla. Taloudellinen niukkuus on näissä maissa yleistä, erityisesti työttömillä. Työttömyys on keskeinen taloudellisen niukkuuden riskitekijä kaikissa regiimeissä. Pohjoismaisessa regiimissä hyvinvointivajeet ovat verrattain harvinaisia lähes kaikkien indikaattorien mukaan. Tosin suhteellisen suuri sairausriski on poikkeus: eritoten köyhyys altistaa terveysongelmille pohjoismaisessa regiimissä. Haavoittuvan sosiaalisen aseman ja yhteiskunnallisen pessimismin välinen yhteys on tyypillinen sekä itä- että mannereurooppalaisen regiimin maissa. Köyhyys synkistää tulevaisuudennäkymiä lähes kaikissa maaryhmissä, kun taas maahanmuuttajat ovat yleensä vähemmän pessimistisiä. Pohjoismaisessa regiimissä maahanmuuttotausta näyttää kuitenkin olevan hyvinvoinnin kannalta osin epäedullinen tekijä. Köyhyys, työttömyys ja yksinäisyys ovat yhteydessä vähäiseen sosiaaliseen arvostukseen. Liberaalissa regiimissä eläminen köyhänä tai työttömänä on yhdistelmä, joka kaikkein selvimmin heikentää sosiaalista arvostusta. Hyvinvointiregiimeissä ei olekaan kyse pelkästään tukien ja palvelujen takaamisesta – myös kulttuurilla on merkitystä.

Avainsanat: hyvinvointi, hyvinvointivaltio, köyhyys, työttömyys, arvostus, syrjäytyminen, sosiaali-indikaattorit, Eurooppa

Sammandrag

Kemppainen T. **Välbefinnande i en socio-politisk kontext. Europeiska välfärdsregimer i jämförelse.** Helsingfors: FPA, Social trygghet och hälsa: Undersökningar 123, 2012. 93 s. ISBN 978-951-669-900-7 (hft.), 978-951-669-901-4 (pdf).

I denna undersökning granskas med hjälp av enkätdata (ESS3) fördelningen av välbefinnande i förhållande till den sociala strukturen inom europeiska välfärdsregimer. Fyra indikatorer för välbefinnande valdes som utgångspunkt för en flernivåanalys: ekonomisk nöd, sjukdom, samhällelig pessimism och socialt erkännande. Huvudsakligen stöder resultaten den uppfattningen att välbefinnande är beroende av individens position i den sociala strukturen och av välfärdsregimen. Fördelningen av förutsättningar för välbefinnande i den sociala strukturen varierar mellan landgrupper enligt tillämpad välfärdspolitik. Den östeuropeiska regimen karakteriseras allmänt av relativt frekvent illamående inom nästan alla de dimensioner som inkluderats i analysen. Ekonomisk nöd är utbredd i de här länderna, särskilt bland de arbetslösa. I själva verket är arbetslöshet en betydande riskfaktor vad gäller ekonomisk nöd inom alla regimer. Inom den nordiska regimen är illamående förhållandevis sällsynt inom nästan samtliga dimensioner, men de relativt allmänna hälsoproblemen är ett undantag: i synnerhet fattigdom ökar risken för sjukdom inom den nordiska regimen. Sambandet mellan sårbarhet och samhällelig pessimism är någorlunda typiskt för både den östeuropeiska och den kontinentala regimen. Fattigdom fördystrar framtidsperspektiven i nästan alla landgrupper, men invandrare är vanligen mindre pessimistiska. Å andra sidan verkar invandrarbakgrund delvis vara en skadlig faktor för välbefinnandet inom den nordiska regimen. Fattigdom, arbetslöshet och ensamhet är associerade med lågt socialt erkännande. Att vara fattig eller arbetslös inom den liberala välfärdsregimen är den kombination som tydligast minskar erkännandet. Välfärdsregimen är inte bara ett system av olika former av stöd och tjänster – också kulturen har betydelse.

Nyckelord: välbefinnande, välfärdsstat, fattigdom, arbetslöshet, uppskattning, utslagning, sociala indikatorer, Europa

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Dedicated to my extended family and friends.

Helsinki, August 2012

Teemu Kemppainen

CONTENTS

1 WELL-BEING AND WELFARE POLICY IN CONTEMPORARY EUROPE

The welfare state has been an object of vivid theoretical discussion and empirical research during the last twenty years. Classifying the empirical welfare policy systems to regimes, clusters or 'families' has been a prominent part of this research branch. In these classifications values and ideologies are typically included as factors that at least partly explain the development of different welfare policy frameworks. The grand politico-cultural constellations of liberalism, conservatism and social democratic egalitarianism are, in fact, often used as specifying labels of welfare regimes (Esping-Andersen 1990; Pfau-Effinger 2005). However, regardless of this, the concept of culture has not been given thorough attention in welfare policy research.

It is often claimed that the Nordic welfare regime is built on egalitarianism and solidarity, but is this culture of values manifest at the level of everyday life? Do people treat, say, the unemployed or poor with more recognition in the Nordic regime than in the regimes dominated by the liberalist ethos of individual merit? Or does the extensive and universalistic welfare state induce fear and hostility regarding the possible misuse of institutionalised solidarity, which turns into social suffering triggered by disrespect and unfair treatment? Does the extensive social policy model corrupt or foster voluntary social contribution? These kinds of questions motivate the present study. They appear exciting because they touch upon the intersection of culture, politics, society and everyday life. By focusing on such a bundle of questions we will be directing our attention to the Durkheimian heart of classical sociology, namely to the moral flavour of the ties that bind individuals together. This way we will approach the sociological core question regarding the welfare state: does it enhance or undermine social integration (Øverbye 2010, 153–156)? At the same time we will extend the traditional scope of comparative welfare research.

The objective of this study is to make a contribution to the current comparative welfare policy research. As the area is vast, we must somehow limit the scope of our research. This will be done mainly on the basis of the study questions that motivate the research in the first place. Also the availability of suitable empirical data sets some limits to what is feasible in practice. Since we are interested in studying well-being in contemporary Europe from the perspective of welfare regimes, we already have two important limitations: by concentrating on Europe, we have made a choice that has implications concerning the geography, history and culture of our research area. The focus on the contemporary period, for its turn, delimits the temporal dimension. Including certain European countries and excluding others depends on the data we are using (the European Social Survey round three – see chapter 4.1 for details).

Our core question is this: *to what extent does welfare regime make a difference with regard to well-being and its distribution across the social structure in contemporary Europe?* Consequently, the two key concepts that form the analytical frame of our study are welfare regime and well-being. Well-being will be approached from various points of view, in line with the idea that it is a fundamentally multi-dimensional concept. The

concept of social well-being denotes a certain perspective to well-being, the choice of which is motivated by two arguments. First, the social aspects of well-being are, as we will demonstrate, very pertinent from a sociological point of view: recognition, included here under the extension of social well-being, has been discussed recently by theorists such as Axel Honneth, Nancy Fraser and Charles Taylor; societal pessimism, another component of social well-being studied in depth here, has its roots in the works of Leo Srole, Robert Merton and Emile Durkheim. Secondly, as this perspective has been given relatively scarce attention in comparative welfare research, we consider it a natural path to explore.

Another key concept in our conceptual framework is that of welfare regime. This concept is meant to cover a wide variety of sub-concepts, including welfare state, welfare model, welfare state model, welfare state regime, welfare society, world of welfare (capitalism), socio-political context and so forth. Some of these concepts are often treated as synonyms, but distinctions are also made for different purposes. It is not implied that these different terms should be synonymous from now on. The idea is simply to stipulate a term that functions as a common name for all these concepts. It is noteworthy that the concept of welfare regime does not *a priori* fix the way welfare policies are arranged: it includes the models that put more emphasis on the state (e.g. the Nordic model) as well as those that rely less on the intervention of public power (e.g. the United States).

Because we are aiming to study the differences between the welfare regimes in terms of well-being, we must first seek to clarify to what extent the concept is still useful in empirical research. After settling this issue, the different welfare regimes will be described from the point of view of well-being. A special emphasis will be given to the perspective of vulnerable social positions. It may be expected that the people who occupy a vulnerable or precarious position (or multiple such positions simultaneously) in their societies, face the adversities of life – the negative sides of well-being – more strongly and more often than the others. In this sense the information that the survey data reveals about living in vulnerable positions provides us with sensitive signals about the dynamics of well-being. This choice of perspective also aims to keep alive the heritage of one of the constitutive roots of sociology, namely social critique (Delanty 2005, 23). The success of welfare policy – and perhaps also the future of the welfare state – will be judged by the fate of those whose lives are characterized by vulnerability, powerlessness, marginality and exclusion (Bauman 2000). This part of our thesis will enable us to sketch a cross-sectional snapshot of each welfare regime, which describes the associations between occupying different vulnerable social positions and different dimensions of well-being.

Finally, a transition will be made from a descriptive to explanatory mode of study, in order to assess the relative importance of welfare regime type after controlling for the relevant individual and aggregate level variables. This is necessary in order to check the extent to which the findings of simple bivariate analysis stem from compositional

effects. This will necessitate a methodological step towards multilevel analysis, which will be introduced in the methods section of our thesis.

European welfare policy is examined from the point of view of regime analysis in chapter two. In chapter three, we shall theoretically explore the subject of well-being; the Nordic tradition will be introduced in some detail. Data and methods of the study will be presented in chapter four. The empirical examination of well-being in the European socio-political contexts will take place in chapter five, which ends with a conclusion of the findings. The final chapter is dedicated to discussion, in which the themes of the whole study are drawn together.

2 MODELS AND CULTURES IN EUROPEAN WELFARE POLICY

This chapter seeks to evaluate the usefulness of the concept of welfare regime as an analytical tool for studying contemporary Europe. To provide background, a historical outline and a presentation of the main explanations of welfare policy development is provided. In the end of the chapter, a cultural perspective to welfare policy will be introduced in order to substantiate the general framework of the study, namely the idea that different welfare regimes can be fruitfully compared *in terms of social well-being*.

A brief conceptual excursion is necessary before proceeding further. The concept of welfare state is historically and conceptually central for discussions dealing with social security and welfare policy. As with all interesting concepts, there is no full consensus about its meaning, but since this is not a study in conceptual history or social philosophy we need not delve into the intricacies (see Pierson and Leimgruber 2010, 32–33; Øverbye 2010, 153–154). According to Christopher Pierson (2006, 10) the term welfare state, in a narrow sense, refers to state-provided services and income transfers, which aim to meet the most central welfare needs, such as health, education, housing, income maintenance and personal social services. More broadly, the term is also used to denote a specific kind of society, "in which the state intervenes within the processes of economic reproduction and distribution to reallocate life chances between individuals and/or classes" (Pierson 2006, 10).

2.1 Conservative, liberal and social democratic roots

The history of the welfare state is largely a European narrative, inextricably tied to the birth of the modern nation state and its bureaucratic capabilities. Even though the egalitarian conception of social justice and the social democratic project are often associated to this development, there is more diversity behind the development of European welfare policy (Pierson and Leimgruber 2010, 32–33; see also White 2010). The key motifs in the standard political history of the welfare state include the Bonapartist-Bismarckian ideas of social policy as a conservative and integrating response to the 'social question'; the liberal heritage of Lloyd George, Beveridge and Keynes; and the Nordic social democratic tradition (Flora 1981, 343–344; Baldwin 1990, 39–40; Pierson and Leimgruber 2010, 34–37). These three welfare policy themes are crucial for understanding the regime discussion, which is why they merit presentation in the context of this chapter.

Let us begin with late 19th century Germany. Even though conservative thinking is basically against state intervention as such because it might excessively leave room for the utopias of the powerful but imperfect rulers, there is still a natural niche for the state to occupy: if something has proven to be good, state intervention may turn out to be necessary for safeguarding the natural order of status quo. However, in historical contexts, different practical solutions are required in order to preserve the

desired state of affairs. Bismarck's role in the history of the welfare state is a case in point. (van Kersbergen and Kremer 2008, 78–79, 85–86.)

Social policy was for Bismarck mainly an instrument of facilitating national integration and guaranteeing the preservation of the prevailing social order and steady functioning of capitalist economy, all of which seemed threatened by modernisation. In order to compensate for his repressive measures against social democrats, Bismarck developed active social policy, leading to the path-breaking laws of sickness insurance (1883), work accidents (1884) and insurance for old age and invalidity (1889). The idea in Bismarck's etatism was that once the workers realise that it is the state that guarantees their income, their revolutionary potential diminishes. This had to be adjusted from the purely etatist approach towards a corporatist direction in order to guarantee necessary political support for the reform. It is not, however, possible to understand the development of the German *Sozialstaat* by referring only to Bismarck's social and political tactics. The socio-intellectual current of German socialism of Lassalle and the "chair socialists" was favourable towards the idea of state intervention. In fact, Adolph Wagner, a leading *Kathedersozialist*, quite correctly predicted the transformation of the night-watchman state into a '*Cultur- und Wohlfahrtsstaat*'. (Polanyi 2001[1944], 183; Rosanvallon 1981, 149–150; van Kersbergen and Kremer 2008, 79; Castles et al. 2010, 5; Pierson and Leimgruber 2010, 35–36.)

While conservative thinking was against modernisation in all its forms, the two other grand ideologies of the story, liberalism and socialism, are deeply associated with the idea of modernity. Regarding the liberalist tradition, it was the social liberalism of the late 19th century – influenced by the socialist analysis of the capitalist system – that formed the intellectual basis on which the subsequent welfare policy development could be built. The classical liberalist ideas of minimal state and negative freedom as non-interference gave way for the conception of positive freedom of opportunity, dependent on the collective conditions for human flourishing. In order to foster these conditions, the state should intervene in the economic domain of ownership and contracts. In other words, it was deemed necessary to compensate for the negative effects of unregulated market economy. Equal opportunities were to be enhanced by reallocating life chances. This implied reforms regarding housing, health care and education, since their poor condition cramped the real opportunities of individuals. (O'Connor and Robinson 2008, 32–35; Pierson and Leimgruber 2010, 37–38.)

Lloyd George was the primus motor behind two important laws that marked the institutional formation of a universalist, comprehensive and coherent welfare state that took care of the individual from "the cradle to the grave": the Old Age Pension Act (1908), entitlement to pension as a matter of social right, and the National Insurance Act for ill-health and unemployment (1911). The Beveridge report and the work of T. H. Marshall continued along these lines and furthered the development of British welfare policy. The influence of Beveridgean thinking was not limited to Britain, but extended to the post-war welfare reforms of Belgium, France and the Netherlands as

well. (Rosanvallon 1981, 143–148; O'Connor and Robinson 2008, 32–35; Pierson and Leimgruber 2010, 37–38.)

In a marked contrast to the conservative Bismarckian idea of social policy, The Nordic social democratic development was reformist for its orientation, linking social policy to the needs of the working class. *Folkhemmet*, the term coined by the Swedish Prime Minister Hansson at the end of 1920s, captures the key themes of the social democratic welfare policy: a good home for everyone, built on equality and respect, solidarity and risk-sharing. (Baldwin 1990, 55; Stjernø 2008, 50; Pierson and Leimgruber 2010, 39–40.) The compromise between labour and capital, facilitated by the powerful position of social democracy, is one of the distinguishing features in the history of the Nordic approach (Goetschy 1994, 125–126). Instead of seeking a revolutionary replacement of capitalism by communism, the aim of the social democratic project was to further incremental social change by means of Keynesian economic policy and progressive taxation. (Pierson and Leimgruber 2010, 37–42.) Trust in the virtuous circles between economic success, politics and ethics – a constitutive element for the Nordic idea of society – had a vital place in this constellation. The founding value and norm in this circle was work and, more specifically, the Lutheran idea about work for everybody. (Kettunen 1997, 158–159.)

2.2 Explaining the development of welfare state(s)

The factors that lie behind the development of welfare policy have been studied extensively. A short survey of the main explanatory variants is necessary in order to understand the emergence of the current welfare regime discussion. To oversimplify slightly, there are two kinds of explanatory frames regarding this issue (for a more exhaustive typology of different theories on the issue, see Pierson 2006; cf. Castles et al. 2010, 5). One of these frameworks understands the development of welfare policy as a necessary outcome of a process that has its own logic, which tends to emphasise the similarity of the different empirical welfare policy paths. The other explanatory family breaks away from the ideas of necessity and explains welfare policy development in terms of politics and agency, leaving more room for differential development in welfare policy. (Cf. Øverbye 2010, 153–156.)

According to the first generation of social policy studies, industrial development and the accompanying economic wealth were the determinants of the welfare state (Baldwin 1996, 24). The "logic of industrialism" thesis was one of the central arguments of this generation. The idea is well condensed in Wilensky's oft-quoted phrase: "the economic growth and its demographic and bureaucratic outcomes are the root cause of the general emergence of the welfare state" (Wilensky 1975, xiii, cited in Bonoli et al. 2000, 9). This is close to what Esping-Andersen (1990, 13) calls the systems or structuralist approach: the explanation is constructed in terms of what the holistically interpreted complex of society and economy requires. The mode of explanation is evidently functionalistic because the emergence of the welfare state is explained by

referring to the function it allegedly needs to perform (Titmuss 1974, 25; Zutavern and Kohli 2010, 173).

Noteworthy in the structural-functionalist approaches is the absence of choice, action and politics. As the events follow each other in a virtually inevitable manner according to the laws of motion of systems, the similarities and the convergence of the different real worlds of welfare are emphasised at the expense of attention to the differentiation. It is industrialism that is the agent as it creates, according to its own logic, both the needs and the possibilities for the appearance of the welfare state. The breakdown of traditional forms of social provision, ushered in by the broad processes of industrialisation, make the welfare state necessary, while the sufficient economic surplus makes it possible. An analogical variant of the functionalist explanatory theme is the modernisation thesis that depicts the welfare state as a functional response to the demands for socio-economic security and equality. In distinction from the industrialisation argument, the modernisation approach emphasises not just the effects of industrial transformation but also the role of democratisation and expanding citizenship. (Esping-Andersen 1990, 13–14; Kosonen 1995, 61–62; Daly 2000, 21–22; Pierson 2006, 17–26.)

While the functionalist approaches play down the role of political action, the Marxist political economy, in contrast, sees class struggle as the driving force behind the welfare state, thus placing politics in a pronounced explanatory position. Conflict and dissent are now the keys to understanding the birth and continuing existence of the welfare state. Some Neo-Marxists see the social security system as nothing more than an instrument guaranteeing the reproduction and subjugation of docile labour force – one more example of functionalist reasoning. On the other hand, others interpret the welfare state as a Trojan horse that introduces an alien element to the capitalist system and, in fact, improves the position of the working class. (Esping-Andersen1990, 11; Daly 2000, 22–23.)

Like the Marxist perspectives, also the political power resources theory (or *narrative*, see Arts and Gelissen 2010, 581), represented by Esping-Andersen, Korpi and Palme, emphasises the role of politics. It is, after all, based on the assumption that "politics matters". (Bonoli et al. 2000, 10.) This theory holds that during the golden post-war years of continuing economic growth, the variation in the developmental paths of different welfare states is largely explained by the way power resources are distributed in society, the way these resources are mobilised and the forms of political coalition-formation (Arts and Gelissen 2010, 570). It is obvious that there is a marked contrast between the functionalist modes of reasoning and the power resources approach, since the latter is explicitly built upon the political, i.e. values, ideologies, interests, struggles, choices and action.

Baldwin (1996, 34–38) considers the methodology of the power resource approach Marxist due to the idea that the position in the social structure determines class interests: it is the working class and the left – or the absence of a strong and unified

right – that largely account for the welfare state development. According to Baldwin, this social democratic explanatory model of the second generation of social policy studies manifests normative assumptions, because it assumes an almost Manichean division of welfare states into the inner core of solidaristic welfare states, able to fulfil the ambitions of the early reformers, and the large mass of nations with only residual attempts for social provision. The Scandinavian (and especially the Swedish) welfare state functions as a goal and an explanatory frame for the others, which creates a geo-political and mono-causal bias. The plurality – of both the welfare models and the political constellations behind them – should not be forgotten, Baldwin concludes. In this sense Esping-Andersen's *The three worlds of welfare capitalism* (1990) marks an important shift of emphasis. Instead of supposing a simple quantitative difference between lesser and greater welfare states or the qualitative binary opposition between the best and the rest, the conception of multiple qualitatively different models started to emerge – or, in fact, re-emerge.

2.3 How many welfare regimes?

An urgent question that has to be settled when comparative welfare policy research is undertaken is how to make a decision between the whole plethora of different typologies of welfare regimes. Esping-Andersen's (1990) famous trichotomy (liberal, conservative and social democratic), with its roots in the works of T. H. Marshall and Titmuss, has been the epicentre of recent discussion (Boje 1996, 19; Abrahamson 1999; Esping-Andersen 2001; Lessenich 2007).

According to Lessenich (2007), the merits of Esping-Andersen's typology are twofold. It has, first, organising potential that helps bring conceptual order to the analysis of real welfare systems. Titmuss (1974, 30) has a similar view, when he maintains that "[t]he purpose of model-building is not to admire the architecture of the building, but to help us see some order in all the disorder". Secondly, Esping-Andersen's work brought about a shift of focus from a unidimensional continuum of social spending to qualitatively different welfare policy arrangements. It is worth noticing that the history of tripolar welfare policy typology is, however, fairly long. Titmuss presented already in 1955 the distinction between fiscal, social and occupational welfare and introduced in the early 70s, expanding the residual versus institutional scheme of Wilensky and Lebeaux, his famous categorisation of residual, institutional and achievement-performance models (Titmuss 1974, 30–31; Abrahamson 1999, 395–398).

Esping-Andersen renames Titmuss's typology by referring to the ideologies that support the models. The residual model becomes 'liberal', institutional turns 'social democratic' and the achievement-performance model becomes 'conservative' or 'corporatist'. (Abrahamson 1999, 400.) Esping-Andersen (1990, 21–27) builds his typology mainly on two concepts: decommodification, referring to the extent to which citizens are, as a matter of right, made independent from the markets in terms of their wel-

fare; and societal stratification. These dimensions differentiate the three qualitatively distinct welfare policy models.[1]

As noted above, politics – in the form of the distribution and mobilisation of power resources – matters for Esping-Andersen in the explanations of welfare policy development. In his later work Esping-Andersen (1999, 4, 140, 172) also accentuates the role of history in the form of path-dependency that constrains the later development of the once-formed institutional system. Whether this 'politics and history matters' approach leads to an excessively static, "frozen landscape" conception of welfare policy and, consequently, prevents us from understanding the unfolding of other possible futures, still remains an open question (Bonoli et al. 2000, 28; Arts and Gelissen 2010, 579–582).

After *Three worlds* a massive welfare policy modelling business started to evolve (Abrahamson 1999). Bambra (2007, 1100–1101) summarises the discussions that comment on Esping-Andersen by distinguishing three lines of criticism. First, theoretical issues include the range of countries and regimes (e.g. the omission of Mediterranean countries, various suggestions for the fourth type), insufficient emphasis on gender and the neglect of services. Second, methodological critique has called for more robust statistical techniques and touched upon miscalculations, and details of indexing and weighting. Also the grouping using averages and standard deviations around the mean has been critically assessed, since this method is, naturally, rather likely to yield tripartite typologies. Finally, the empirical criticism is armed with replication studies yielding different results (e.g. Scruggs and Allan 2006) and observations about the effect of time on classification.

Many of the typologies that have emerged can be interpreted on the basis of Esping-Andersen's work: whether the gist has been about a distinct category for the Mediterranean welfare policy models, the addition of an Antipode model or more focused attention on the gender aspect, the original classification has shown a considerable overlap with the later ones. (Arts and Gelissen 2002, 142–148.) Most classifications cluster real welfare policy regimes in a fairly consistent manner, yielding a Nordic welfare regime, characterised by high decommodification, cross-class solidarity, universalism, comprehensive coverage, generosity, and a pro-women orientation; an Anglo-Saxon regime, distinguished by residual public provision, low decommodification, targeted benefits and encouragement of private welfare; a Continental European group, known for moderate decommodification, corporatist social insurance segmented by occupational status (narrow solidarity) and preservation of traditional family structures; and a Mediterranean group that accentuates familial welfare provision (Esping-Andersen 2001, 14481–14482; Arts and Gelissen 2010, 571–577).

In recent comparative empirical welfare policy studies (Eikemo et al. 2008; Ervasti 2008; Fridberg and Kangas 2008a and b; Listhaug and Ringdal 2008; Ringdal 2008),

1 For a critical analysis of Esping-Andersen's regime construction, see Scruggs and Allan 2006.

a classification of five groups is used, adding to the typology an Eastern European group – a distinct European family of nations characterised by less generous governmental programmes and a relatively fragile social situation (Arts and Gelissen 2010, 579; see also Inglehart 2006, 122 and Schwartz 2006, 156–160). The consensus concerning classifications should not be exaggerated, however (cf. Kautto 2002 and Bambra 2007). While some European countries, especially Germany, Norway and Sweden, tend to appear as stable standard examples in different classifications, the consensus is weaker for others and non-existent for some: especially the Netherlands (the "Dutch enigma") and Switzerland tend to evade consistent classifying (Esping-Andersen 1999, 87–88; Arts and Gelissen 2002, 148–151). This is the price of a methodological choice that aims for clarity by means of classification, or to put it differently, the price of focusing on the forest instead of each singular tree (cf. Esping-Andersen 1990, 106; Esping-Andersen 1997, 179; Castles 2010, 630).

It can be concluded that it is justified to use welfare regime as an organising concept because the classifications have shown satisfactory stability. In addition, it is an industry standard in comparative welfare policy studies. The implied trade-off – losing details and doing some violence to empirical diversity – is inevitable in a study that includes a relatively large group of countries. But how to concretely decide upon classification regarding the countries included in the data of the present study, namely the data of the European Social Survey round three (ESS3)?

Fridberg and Kangas (2008a) studied how welfare regimes differ in terms of social exclusion using the data from ESS1. This study is the starting point and the source of methodological approach for our thesis. The authors categorise the welfare systems as follows (see also Fridberg and Kangas 2008b):

Anglo-Saxon welfare regime: Ireland and the United Kingdom
Continental: Austria, Belgium, France, Germany, Luxembourg, the Netherlands and Switzerland
Eastern European: the Czech Republic, Hungary, Poland and Slovenia
Nordic: Denmark, Finland, Norway and Sweden
Southern European: Greece, Italy, Spain and Portugal

This typology basically extends Esping-Andersen's trichotomy with the Latin rim and the Eastern (Central) European transition nations. The placement of the Netherlands and Switzerland may be slightly problematic, or at least its validity cannot be taken for granted. For example Whelan and Maître (2008) place the Netherlands in the Social democratic regime with the Nordic countries. They also divide the post-socialist group in two clusters, the *corporatist* (The Czech Republic, Hungary, Poland, Slovenia and Slovakia) and the *liberalist* (Estonia, Latvia and Lithuania) groups; the latter country group is not, however, present in ESS1. Various other studies utilise similar classifica-

tion although they do not always explicitly refer to welfare policy models but, instead, just (geographical) country groups.[2]

Also the recent study by Levecque et al. (2011), analysing the effects of welfare regimes on the relationship between economic hardship and depression, is very relevant in this context since the way the research question is framed resembles our study considerably. Furthermore, Levecque et al. base their study on ESS3 data. The contents of this study – and the one by Fridberg and Kangas – will be presented later in more detail. For the purposes of this chapter it suffices to identify the country classification used:

Anglo-Saxon welfare regime: Ireland and the United Kingdom
Bismarckian: Austria, Belgium, France, Germany, the Netherlands, Switzerland
Eastern European: Bulgaria, Estonia, Hungary, Poland, Russia, Slovakia, Slovenia, Ukraine
Nordic: Denmark, Finland, Norway, Sweden
Southern European: Cyprus, Spain, Portugal

The authors label the conservative/corporatist/continental regime as Bismarckian, and, like Fridberg and Kangas, decide to include the Netherlands and Switzerland in this category. In the ESS3 the former socialist countries are prominently represented, whereas the Latin rim includes, unfortunately, only the Iberian corner and Cyprus. This classification of five groups is adopted for the purposes of our study.

2.4 Welfare culture

Comparative value research supports the view that countries can be meaningfully considered as cultural units. Societies differ in terms of how values are placed in order by their importance. Furthermore, countries tend to cluster systematically into value clusters in ways that show a fair degree of overlap with welfare regime classifications. (Inglehart 2006; Schwartz 2006 and 2007.) This overlap is not perfect, but it seems plausible that welfare regime is about more than just the concrete benefits and services: in addition to the institutions of welfare policy, culture and values also merit attention. Let us take some examples that illustrate the relationships between policy and culture. On the one hand, in democratic systems, policy-making should typically resonate with the popular value conceptions. The political elites are, after all, dependent on the populace regarding their re-election. (Pfau-Effinger 2005, 10; see also Pierson 1996, 176–179.) On the other hand, welfare policy models have an impact on social attitudes regarding welfare, care and income distribution (Arts and Gelissen 2010, 582). In addition, culture moderates the effects of welfare policies on the behaviour of individuals and groups (Pfau-Effinger 2005, 4–6). In brief, a system of policies is embedded in a cultural context.

2 Cf. Ferrera´s (1996) concept of "geo-social" family.

The recent work of Pfau-Effinger (2005) provides a promising framework for analysing the constellation of values, interests, institutions, everyday life and welfare policies. The concept of *welfare culture* occupies a central place in her theoretical construction. She defines welfare culture as the "complex of ideas to which welfare state policies refer"; in other words, "the relevant ideas in a given society surrounding the welfare state". More specifically, welfare culture "comprises the stock of knowledge, values and ideals to which the relevant social actors, the institutions of the welfare state and concrete policy measures refer." (Pfau-Effinger 2005, 4; see also Inglehart 2006, 122 and Schwartz 2006, 156–160.)

Some examples bring the idea to a more concrete level. The cultural assumptions concerning what is just in terms of redistribution form a part of the cultural foundations of welfare policies (Pfau-Effinger 2005, 8). As Titmuss (1974, 141) points out, the questions of distributive justice are at the core of social policy: should each get according to her/his need, worth, merit or work? This question has empirical relevance, as there are substantial cross-national differences in the way justice is understood in this respect (Pfau-Effinger 2005, 8). Another related fundamental question in welfare policy is that of poverty. The cultural assumptions – lay explanations or lay ontologies – about poverty differ in terms of how its causes are attributed (individual vs. social factors) and to what extent the outcome is inevitable (i.e. bad luck versus laziness) (van Oorschot and Halman 2000, 4–7; Pfau-Effinger 2005, 8–9; cf. Lepianka et al. 2009). The role of family in the production of welfare is yet another example. The dominant cultural understandings of the family, touching upon the issues of gendered division of labour, upbringing of children and elderly care, differ considerably in European comparison (Pfau-Effinger 2005, 9). Other key elements of welfare culture include the ideas about work and the labour market, citizenship, inclusion and solidarity, the state-market relationship.

It is not implied that welfare regimes are simple indices of coherent underlying value cultures. As Pfau-Effinger (2005, 6–11) observes, a cultural system includes divergent and also opposing values. However, it is crucial to recall that values as such do not make policies. The link between the cultural level and welfare policies is constituted by social actors, for whom the welfare culture functions as a source of ideas, values and models. These can be put to discursive use in order to influence the development of a given welfare policy. The relationship between ideas and interests is central: they are not totally dependent (e.g. the idea of social position determining the ideological stance) or independent, but rather inter-related and partly autonomous. In other words, "[i]deas vary according to material interests of social groups, but ideas can also be shared by a majority of the population independent of their material interests" (Pfau-Effinger 2005, 11).

Let us next add some flesh to the framework by presenting the findings of Schwartz (2007) on the value profiles of the countries included in the first round of ESS. Schwartz, who bases his studies on an exceptionally elaborate combination of theoretical and empirical work, summarises the European value orientations by using a map of two

principal value dimensions. *Openness* to change versus *conservation* of status quo is one of the dimensions. Openness refers to self-direction, independence of action and readiness for new experience. Conservation is linked to security, conformity, tradition and resistance to change. The other dimension is *self-enhancement* (self-promotion) versus *self-transcendence* (other-enhancing). Self-enhancement refers to self-interest, power and achievement, while the opposite, self-transcendence, involves concern for the welfare of others. The culture of former communist countries is, in comparative terms, rather conservative and gives high priority to self-enhancement. The Latin rim countries of Spain, Portugal and Greece are rather close to the Eastern regime in this respect.[3] All these countries share a history of fairly recent totalitarian rule and low income level. The Anglo-Saxon countries are close to each other on the map: compared to other Western European countries, these liberal cultures give, somewhat expectedly, priority to self-enhancement. This may reflect, as Schwartz (2007, 187) observes, "their liberal welfare regimes that give freer reign to market forces and require individuals to fend more for themselves." However, for the rest of Western Europe, no neat regime pattern can be found. In other words, the social democratic and conservative regimes do not cluster clearly in this analysis. In broad comparison, the dominant value cultures in these countries are characterised by openness to change and concern for others. Finland and Norway are more conservative than Sweden and Denmark. Finland is more strongly prone to self-transcendence than other Nordic countries. (Schwartz 2007, 186–188.)

From the discussion above, we shall retain the idea that the differentiation of welfare policy models is, partly, to be explained in terms of the political process of policy-making that involves ideas and conflicts, negotiation and compromises and in which both ideas (culture) and interests (social structure) have their place. Hence, what the welfare policy looks like today tells something about the heritage of dominant cultural values – an idea for which comparative value research yields some evidence. This is why it makes sense to conduct a comparative study of well-being that is not limited to the traditional aspects of welfare policy. The every-day life of, say, an unemployed person may look, feel and be rather different depending on the socio-political and cultural context in which she/he lives. As a logical continuation it is the quality of life – i.e. well-being – that we now turn to.

3 One should keep in mind, however, that family and neighbourhood are important frames of social integration in Southern Europe, known for its familialism (Paugam and Russell 2000, 261; Esping-Andersen 2001).

3 THEORETICAL PERSPECTIVES TO WELL-BEING

Population and its living conditions have gained increasing prominence as a subject of knowledge and as an object of governmental rationality from the late 18th century onwards. A central idea that accompanies this development is to regard population as a resource that should be taken care of. (Foucault 1976, 183–186.) Welfare, well-being and other similar notions have come to function as analytical tools in this intertwined development of knowledge and power. This preoccupation shows no signs of diminution – on the contrary. To mention just some notable examples: a large portion of official statistical production focuses directly on, or deals indirectly with, the living conditions of the population; the well-being module of a recent high-quality European wide survey, the European Social Survey, aims to "evaluate the success of European countries in promoting the personal and social well-being of their citizens" (Huppert et al. 2009, 302); an expert commission of Stiglitz, Sen and Fitoussi, initiated by the then-incumbent French president Sarkozy, published some time ago their famous report with the objective of shifting "emphasis from measuring economic production to measuring people's well-being" (Stiglitz et al. 2009). In brief: well-being is currently a flourishing topic.

Böhnke and Kohler (2010) present a concise theoretical outline of the two main approaches to studying well-being. *The subjective approach* considers subjective well-being, measured by questions concerning life satisfaction and happiness, as the indicator of well-being. Well-being, for its turn, is regarded multi-dimensionally as a consequence of various factors. *The objective approach* differs from this in that subjective well-being is no longer the indicator of well-being, but, instead, just one of the factors influencing well-being. Instead, there are different indicators for the dimensions of well-being. The objective approach, implying a defined set of well-being indicators, is typically used in comparative study designs, whereas the subjective conception, which offers an independent operational definition for well-being, is adopted when the causes of well-being are examined. The Swedish level of living approach and OECD social indicators are good examples of the objective approach; also the present study conceptualises well-being this way. (Böhnke and Kohler 2010, 630–632.)

In what follows, we shall first approach well-being by examining the key tenets of the Nordic research tradition, after which we will introduce the work of the team that designed the well-being module for the data set used in this study, the European Social Survey round three (ESS3). Finally, the well-being indicators of our study will be spelled out in detail, both from theoretical and technical perspectives.

3.1 The Swedish study: descriptions of resources

As well-being is one of the buzzwords in contemporary political and social scientific discussions, it is safe to say that the heritage of the Nordic research tradition on well-being is now more topical than ever. Consequently, the accounts of Johansson (1976

and 1979), Erikson (1993) and Allardt (1993), shedding light on the most central theoretical questions this research tradition dealt with, merit considerable attention.

The description and measurement of well-being is an obvious starting point, but should the research focus on *needs* or *resources*? A United Nations expert group suggested already in 1954 that per capita GNP is not a sufficient measure of the well-being of citizens; well-being should be measured multi-dimensionally, on the basis of its various components. These ideas influenced the Swedish Level of Living Survey, a panel study first conducted in 1968 and repeated in 1974 and 1981. In this study, nine different areas of life were studied (table 1). (Johansson 1979, 49–55; Erikson 1993, 67–68; cf. Stiglitz et al. 2009.) The Swedish study accentuates the Titmussian idea of command over the resources that an individual employs to "control and consciously direct his living conditions" (Erikson 1993, 73; see also Johansson 1976, 238–239). These mutually incommensurable resources include money, possessions, knowledge, energy, social relations and security. Due to their incommensurability, different kinds of resources must not be condensed to one indicator. Instead, all dimensions must be taken into account separately when the level of living of an individual is assessed. Consequently, the total picture will necessarily be a rather complicated one. (Erikson 1993, 72–75.) Comparing this resource conception to Sen's concept of capabilities, Erikson (1993, 73) underscores the idea about scope of action: in this framework, an individual is seen as "an active being who uses his resources to pursue and satisfy his basic interests and needs."

Table 1. *Components of well-being and some typical indicators in the Swedish Level of Living Surveys.*

Component	Indicators
1. Health and access to health care	Ability to walk 100 m, various symptoms, medical contacts
2. Employment and working conditions	Unemployment experiences, physical demands of work
3. Economic resources	Income, wealth, property, ability to cover unexpected expenses
4. Education and skills	Years of education, educational level
5. Family and social integration	Marital status, contacts with friends and relatives
6. Housing	Persons/room, amenities
7. Security of life and property[a]	Exposure to violence and thefts
8. Recreation and culture	Leisure-time pursuits, vacation trips
9. Political resources	Voting, union and party memberships, ability to file complaints

[a] In the first survey (1968), questions on diet and nutrition were asked instead of items on security.
Source: Johansson 1979, 55; Erikson 1993, 68.

From this point of view the researcher does not have to decide what the key needs are. The individual is assumed, in line with the liberalist tradition of thought, to use resources according to his or her best interests. But one must still determine what the most important resources are, which implies that the relative importance of different areas of human life must be determined in the research process. In other words, the key areas of well-being have to be identified by the researcher in any case. (Johansson 1976, 239; Erikson 1993, 73.) On what basis were the components (table 1) chosen in the Swedish study? Erikson points out that the Swedish cultural context had an impact on the way the level of living components were identified. Also practical concerns are present, as the chosen components were deliberately such that could, at least in principle, be influenced. Or, as Erikson puts it "[t]he components refer to conditions and problems which we all meet during our lives and which are of such importance that there are collectively organized attempts to cope with them in all societies." (Erikson 1993, 74–75; cf. Titmuss 1974, 23–24; see also Whelan and Maître 2008, 201.)

Another central question concerns *the mode of observation*. Who should judge the level of well-being, the individual or the observer? The needs-based conceptualisation of well-being suggests asking people about their satisfaction, but there is a problem as satisfaction is partly influenced by the yardstick people use. A person adapted to a high level of living may be rather dissatisfied when her/his living standard is reduced slightly, whereas another person, used to a relatively low level may judge her/his situation in a positive light. This is the reason why the influence of subjective account is downplayed in the Swedish scheme. Erikson portrays an ideal-typical dichotomy of indicators: in the case of *objective indicators*, individuals are asked to describe their conditions and resources – in fact, Erikson suggests that the label 'descriptive indicators' be used instead to make clear what is being measured. In contrast, *evaluative* (or subjective) indicators articulate satisfaction, or, how people evaluate their conditions. (Erikson 1993, 67, 76–77.) The issue of societal planning partly explains the preference for the more objective descriptive indicators: data for planning should be about factual conditions. State acting directly to impact satisfaction and happiness is, in Erikson's (1993, 78) vivid description, "the basis for many of the futuristic hells suggested to us in literary works."

3.2 Allardt: needs and subjective perspective

The objective well-being approach revolves around the idea of defining, as it were, *a priori* a set of well-being indicators, "a list of goods that are necessary for a good life" (Böhnke and Kohler 2010, 633). About some components there is a broad consensus (income, health, security, education, labour market integration), but the inclusion of subjective well-being is more controversial. (Böhnke and Kohler 2010, 633.) The Swedish approach did not include it, but Allardt, the Finnish pioneer of welfare research, is of contrary opinion.

The Swedish survey initiated the Nordic tradition of nationwide welfare surveys. In the 1970s, surveys on quality of life were executed in all Scandinavian countries. The Nordic tradition hosted two different conceptual approaches to welfare research, concentrated, respectively, around the concepts of welfare resources and basic needs. (Allardt 1993, 88–89; see also Johansson 1976, 237.) According to Allardt the resource-based conception of the Swedish study was, while considered an important forerunner and inspiration, deemed too narrow when the second comparative Scandinavian welfare study was conducted in 1972. A conceptual extension was seen necessary in order to avoid an excessively one-sided focus on material conditions and to obtain a fuller, sociologically meaningful picture of welfare and human development in advanced industrialised societies. The basic needs approach, based on the work of Johan Galtung, was introduced for this purpose. The conditions without which human beings would not be able "to survive, avoid misery, relate to other people, and avoid alienation" are the key tenet of this approach. One of the best-known formulations of these "necessary conditions of human development and existence" is probably Allardt's own triptych of *having, loving* and *being.* (Allardt 1993, 88–89.)

'Having' comprises the material conditions necessary for survival and fighting against misery. Allardt remarks that the set of indicators chosen to tap this dimension depends on the context: investigating the availability of water would not be interesting in Scandinavia, although this would be a highly important concern when studying many less advanced societies. Allardt suggests the following components for examining the material conditions in the Scandinavian countries: economic resources, housing conditions, employment, working conditions and health and education; also measures describing the biological and physical environment, such as air, ground and water pollution, could be incorporated into this dimension. Instead of or in addition to the average levels of these, one should report the distribution and focus on the notion of floor or bottom level, "below which no individual should be located" (Allardt 1993, 89–90); this idea of directing attention towards the less favourable tail or margin of the distributions is prominently adopted in the present study as we have chosen to highlight the perspective of those who occupy vulnerable social positions.

'Loving' refers to the need of social life and social identities. The corresponding indicators include family and kin contacts, attachments to local community, active patterns of friendship and relationships within associations and work life. Allardt's concept of 'being' tries to gather the ideas of individual integration to society, harmony with nature, personal growth and alienation under the same umbrella concept. The relevant measures include opportunities for meaningful activities, such as participation in activities and decisions that influence personal life, political activity, leisure activities, and meaningful work life. Also the possibility to enjoy nature is included in the category of 'being'. (Allardt 1993, 91.) The indicators of social well-being in our study (social relations, social contribution, local ties, societal pessimism and recognition) can be related to Allardt's 'loving' and 'being' dimensions.

The Nordic comparative study took departure from the Swedish study not only in terms of the focus on needs instead of resources, but also regarding the theme of subjective versus objective indicators. Allardt describes the objective indicators as those "simply designed by experts and researchers on the basis of what they think is either necessary or wanted by human beings." Subjective indicators measure attitudes, subjective evaluations or people's wants, whereas objective ones target external and factual conditions, overt behaviour and both needs and wants. The dilemma is that if welfare criteria are based solely on subjective accounts, "unbearably conservative" results ensue, which is explained by the observation that the underprivileged are usually less capable in expressing their satisfaction and discomfort. It should be added that, in addition to differences in articulative capabilities, also the adaptivity of expectations complicates this approach. If, on the other hand, the subjective indicators are neglected, similarly unbearable "dogmatism of the experts" may be the result. This dilemma, coupled with the empirical finding that the subjective and objective indicators correlate relatively poorly, suggests that both kinds of measures be used (table 2). (Allardt 1977, 25–26 and 1993, 92–93; see also Elster 1985 and Huppert et al. 2009, 303.)

Table 2. *Allardt's three dimensions of well-being. Objective and subjective indicators.*

	Objective indicators	**Subjective indicators**
Having	Objective measures of living and environmental conditions	Subjective feelings of dissatisfaction/ satisfaction with living conditions
Loving	Objective measures of relationships to other people	Unhappiness/happiness – subjective feelings about social relations
Being	Objective measures of people's relation to society and nature	Subjective feelings of alienation / personal growth

Source: Allardt 1993, 93.

3.3 ESS3 well-being module: towards an extensive conception of subjective well-being

The inclusion of certain aspects of social well-being in our study is motivated by the observations about the importance of relationships to our subjective, experienced well-being, in other words, happiness and life satisfaction. How individuals are related to other people and surrounding society has been found to be crucial for subjective well-being and, interestingly, both social support (i.e. getting) and social contribution (i.e. giving) tend to enhance well-being. (Huppert et al. 2009, 304.) In addition, these social aspects are, almost by definition, sociologically interesting as such. For these reasons we have chosen to include a wide range of indicators of social well-being to our analytical frame of well-being.

The team that designed the well-being module of the European Social Survey round three (ESS3) [4] aimed to supplement the use of objective indicators – such as GDP, consumption, health, crime rate and education – by a more subjective perspective: how do people experience their lives? This 'perceived quality of life' is only weakly or even contradictorily associated to these objective indicators, which is why a more complete picture of well-being is needed when the success of societies is judged, the team argues (see also Allardt 1993). Unsatisfied with the traditional 'global' approach to subjective well-being that uses only few general, 'global' indicators such as happiness or life satisfaction, the team set out to develop a relatively extensive set of questions tapping both the *personal* and *inter-personal* aspects of subjective well-being. (Huppert et al. 2009, 301–305; see also Easterlin 2010, 111.) *Of these questions we have chosen to focus on the inter-personal or social indicators*, because we consider them of greater sociological interest than the personal ones. In the module, social well-being is analytically divided into 'feeling' indicators that have to do with 'having' and 'being' – notice the terminological resemblance with Allardt's work, to which no reference is made by the team – and 'functioning' indicators that tap the more active 'doing' dimension of social well-being. This dual structure reflects the ambition of the team to combine two approaches to well-being, namely, the hedonic point of view, dealing with happiness, satisfaction and pleasure, and the eudaimonic perspective, emphasising the importance of doing, functioning, human potential and self-realisation. The 'feeling' dimension includes the constructs 'belonging', 'social support', 'social recognition' and 'societal progress', while the 'functioning' refers to 'social engagement', 'caring' and 'altruism'. (Huppert et al. 2009, 303–305; see also Keyes et al. 2002 and the Nichomachean ethics of Aristotle.)

3.4 The analytic strategy and well-being indicators of the present study

In this study we approach well-being from multiple points of view, in line with the idea of the multi-dimensionality of well-being. While some of the adopted perspectives are rather standard in comparative welfare policy research, others can be considered as extensions to the traditional set of indicators. In concrete terms, *well-being will be approached in this study by eight indicators, consisting of two sets*. The more traditional first set serves to replicate, with a more recent data set and some technical changes, parts of the study by Fridberg and Kangas (2008a): these dimensions are economic hardship, sickness, social relations and safety (the ESS core questionnaire).

The genuine contribution of our study lies in the second set of indicators, which covers well-being rather extensively from a social point of view: social contribution, societal pessimism, local ties and recognition (the ESS3 well-being module). As policies have both intended and unintended consequences, it does not make sense to limit the scope of analysis to those aspects that are explicitly included in the domain of welfare policy (e.g. level of living and health) (see Arts and Gelissen 2010, 583). To slightly

4 For a detailed presentation of European Social Survey, see the chapter 4.1 of the present study.

modify what Giddens (1987, 10) says, while we are the creators of welfare policy, at the same time this welfare policy is not our own creation. One of the reasons why a given policy adjustment does produce unintended outcomes is the cultural context, elaborated above in some detail (Pfau-Effinger 2005). The models and values of our cultural context moderate the link between policy and its outcomes. What happens in everyday life is not determined by policies in a straightforward manner, because our behaviour is not governed exclusively by the simple economic rationality of the *homo economicus* – the concept of moral rationality implies that economic considerations "are embedded in, and logically secondary to, moral and normative choices" (McCarthy and Edwards 2011, 170–171; see also Titmuss 1974, 24 and Jordan 2008, 128–129). As the editors of the recent compilation *Culture and welfare state* (van Oorschot et al. 2008, 1) put it, "those who deny any significant relationship between culture and welfare policy take a lonely position". In short: culture matters. The choice of well-being indicators should reflect this idea. The social aspects of well-being constitute here a step in this direction.

At first, all eight indicators will be used to gain a more general picture of contemporary European well-being (the introduction of chapter 5 and chapter 5.1). This picture is still, quite naturally, selective because well-being includes more than what our indicators cover. As the study later progresses in analytical depth, the focus will be narrowed and the number of dimensions will be reduced (chapters 5.2–5.5). This is simply because both the available resources and the space of presentation are limited. Hence, four indicators will be chosen for further analysis by multivariate methods, two from each set: economic hardship and sickness constitute the traditional core area of social policy (studies), which is why they are retained. From the second set, societal pessimism and recognition are chosen because they are linked to sociologically interesting theoretical discussions. In what follows, theoretical background and technical details will be provided for our indicators of well-being. Special attention will be given to societal pessimism and recognition. For the calculations concerning the technical features of scale construction, the data were weighted by the analysis weight variable ('design weight' in the ESS terminology) in order to compensate for the effect of different inclusion probabilities. Cronbach's alpha was used to examine the internal consistency of the scale (Zeller and Carmines 1980, 56–59; for a critical account, see Vehkalahti 2000). Alpha is a somewhat conservative measure of reliability because it tends to underestimate it (Metsämuuronen 2002, 54–55), but it is nevertheless widely used. Mechanical application of alpha leads to maximising reliability at the cost of validity, but in this study validity was not sacrificed by dropping items on the basis of alpha values (cf. Vehkalahti 2000, 82–83): items were chosen purely on a theoretical basis and due to their face validity and theoretical significance (and by virtue of being available in the ESS3 data).

3.4.1 Economic hardship

In social policy economic welfare has traditionally been approached from the perspective of poverty. The question about the nature of poverty is, in fact, a classic theoretical issue of the discipline. 'Absolute' poverty is often defined by fixing a limit of minimum income or money on the basis of a particular criterion (subsistence level, nutritional needs, "one dollar per day", a conventional point in income distribution). However, these stipulations are often arbitrary and – technically speaking –also *relative* to the local price or income levels and to changing conceptions about what is necessary. (Townsend 1979, 33; Blakemore 2003, 78–79, 269; Kangas and Ritakallio 2005, 28–29; Moisio 2006, 639; Ringen 2006, 150; Ilmonen 2007, 362.)

The notion of relative poverty, in its turn, involves a more encompassing understanding of the matter as it aims to shift the focus from money and the bare (physiological) necessities to a broader, contextually sensitive understanding of human life. What the local social norms are in terms of lifestyle, consumption and tastes, dictates the contours of an acceptable way of life; poverty jeopardises the ability to participate, consume and appear in public – i.e. to live, in the social sense of the word – without shame or stigma. (Blakemore 2003, 79–80, 269; Kangas and Ritakallio 2005, 29–34; cf. Goffman 1986[1963], 7.) Peter Townsend (1979, 31), the author of the monumental work about poverty in the United Kingdom, aptly summarises the idea of relative poverty as relative deprivation: poor individuals, families and groups "lack the resources to obtain the types of diet, participate in the activities and have the living conditions and amenities which are customary, or at least widely encouraged or approved, in the societies to which they belong. Their resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary living patterns, customs and activities."

Another central distinction runs between the direct and indirect conceptualisation (and the corresponding measurement) of poverty. In the first conception, poverty is defined by the determinants of the way of life (income, other resources); the latter conception understands poverty in terms of the way of life itself. (Kangas and Ritakallio 2005, 33–34; Ringen 2006, 146.) Also the questions about descriptive (objective) and evaluative (subjective) modes of analysis, presented above in the context of the Nordic tradition of welfare research, are highly relevant when we are deciding from which perspective to approach economic welfare and the lack of it. Let us take voluntary downshifting as an example. If poverty is understood directly, by referring to the way of life, and approached objectively, without taking into account the subjective experiences and meanings involved, a happy downshifter would be poor in operational terms. Directing attention to the resources with which our downshifter is directing her/his life course, we make a more valid judgment about this particular issue. In sum, the way poverty is conceptualised and operationalised has a considerable effect on the results (see Fridberg and Kangas 2008a, 42).

As this short introduction already testifies, there is a complex conceptual and methodological constellation under the deceivingly simple surface of the phenomenon; unfortunately, it is not possible to enter here into an in-depth analysis.[5] In terms of operationalisation, our indicator of economic hardship, formulated following Fridberg and Kangas (2008a), leaves the judgment about coping with household income to the interviewee (item F33 below), in the spirit of the direct and subjective approach. This can be seen as a democratic (Kangas and Ritakallio 2005, 36, 47–48) but possibly conservative (Allardt 1993, 92) methodological choice (see also Marlier et al. 2007, 158–159). But as Böhnke and Kohler (2010, 634) observe, the difference between objectivity and subjectivity often blurs at an operational level: a respondent's answer to F33 can be taken to indicate her/his household's economic situation (objectivist/descriptivist reading) or her/his satisfaction with it (subjectivist/evaluative reading), depending on the perspective. A different item is included in the indicator as well, namely the one asking about the possibility to borrow money in case of need (item F34). The latter item, the tone of which is perhaps slightly more descriptivist than in the first item, extends the scope of indicator from incomes to a broader domain of (virtual) resources (cf. Kangas and Ritakallio 2005, 37) and relationships to other people.

F33. "Which of the descriptions on this card comes closest to how you feel about your household's income nowadays?" (1 Living comfortably on present income – 2 Coping on present income – 3 Finding it difficult on present income – 4 Finding it very difficult on present income).[6]

F34. "If for some reason you were in serious financial difficulties and had to borrow money to make ends meet, how difficult or easy would that be?" (1 Very difficult – 2 Quite difficult – 3 Neither easy nor difficult – 4 Quite easy – 5 Very easy)

The two items were combined in order to study the respondents' self-perceived economic situations. The scale of F34 was reversed and compressed to fit F35, after which the scores were summed. Finally the sum was scaled to extend from 0 to 100 – higher values indicate a direr economic situation. Cronbach's alpha for the scale is fairly low, 0.587, which is unfortunate.[7] The between-item correlation (original items) is −0.416; and the item-scale correlations are 0.833 (F33) and −0.849 (F34).

In the analyses that follow, dichotomous variables are used to simplify parts of the analysis (see Fridberg and Kangas 2008a). The idea is to direct attention to the least

5 Heikkilä (1990) provides a concise account of the matter. For a recent study on income, lifestyle deprivation and economic stress in EU, see Whelan and Maître (2008).

6 7 Refusal – 8 Don't know – 9 No answer; answer options 7, 8 and 9 are not included in the analyses and are omitted from the remainder of this technical documentation. The source of meta-data (i.e. descriptions of items, variable and value labels) is the Appendix A3 by ESS (ESS [no date]).

7 Nunnally's oft-cited recommendation for alpha is to be at least 0.7 (Nunnally 1978, 245). However, Kent (2001, 221–222) argues that there is no empirical, theoretical or analytical basis for a strict intepretation of the limit value. In the actual research practice one has to sometimes accept sum indexes with lower alphas for pragmatic reasons (Alkula et al. 1999, 99).

favourable minority (cf. Allardt 1993), separated at about quartile or quintile value, depending on the shape of the distribution: in this case 25.6 percent were assigned the status of high economic hardship. Cross-tabulation with the original variables clarifies what this means: the category of severe hardship includes only persons who chose 'difficult' or 'very difficult' in F33 and from 'very difficult' to 'neutral' in F34 above. On the other hand, if either borrowing possibilities or the present income situation were better than this, the respondent was excluded from the group of high economic hardship.

3.4.2 Sickness

As with every interesting concept, there is theoretical debate about the nature of health. Irrespective of whether health is understood in terms of the Hippocratic idea of balance, negatively as absence of disease or in terms of well-being, strength and ability, it is an indispensable dimension in any study of well-being. (Canguilhem 1972, 12, 130–134; Lundberg and Lahelma 2001, 44–46; Nordenfelt 2007, 537–541; Böhnke and Kohler 2010, 633.) An influential conceptualisation of health and sickness by the French epistemologist of medicine Canguilhem (1972) is shared by sociological survey research to the extent that both find the role of subjective experience indispensable in understanding health and sickness (see also Böhnke and Kohler 2010, 634); it goes without saying that subjective perception is fallible as there are conditions that are not manifest before a certain stage (e.g. early stage cancer) (Canguilhem 1972, 53). However, self-reported health has been found to be associated with other, more objective health measures and it is seen as a relatively valid and important indicator of health (Heistaro et al. 2001; Eikemo et al. 2008, 52–53; Jylhä 2009). The relevant items available in our data are:

C15. "How is your health in general? Would you say it is ..." (1 Very good – 2 Good – 3 Fair – 4 Bad – 5 Very bad?)

C16. "Are you hampered in your daily activities in any way by any longstanding illness, or disability, infirmity or mental health problem? If yes, is that a lot or to some extent?" (1 Yes a lot – 2 Yes to some extent – 3 No)

These items were combined for a scale tapping the subjectively evaluated health condition of the respondent. The scale of C16 was reversed and stretched to fit C15. Their sum was scaled to extend from 0 to 100 (higher values mark worse self-perceived health status). Cronbach's alpha = 0.711; correlation between the original items is −0.567; scale-to-item correlations are 0.855 (C15) and −0.912 (C16).

The dichotomous variable indicating high sickness isolates 29.2 percent with highest sickness scores. Eight percent of the respondents who reported good or very good health in C15 were included using this procedure (due to being hampered by health problems in C16); 1.4 percent of those who were not hampered by health problems

in C16 were included (due to reporting bad or very bad health in C15). In the case of this indicator, it was sufficient to have a high score on either of the variables to be included in the group of high sickness.

3.4.3 Societal pessimism

Societal pessimism was chosen as one of the dimensions of social well-being that are analysed in more detail, due to the interesting link that can be established to classic theoretical sociological discussions. Durkheim's *anomie* is one of the foundational concepts in sociology. Anomie, introduced in studies concerning the division of labour in society (1893) and suicides (1897), refers to deficient normative regulation in society. (Durkheim 2002[1897], 104; Deflem 2007.) There are two principal forms of deregulation. Sudden societal transitions induce acute problems in the regulatory capacity of society whereas chronic deregulation is characteristic for trade and industry, i.e. the sphere of economy. Both forms of deregulation lead to a society level state of anomie because the unlimited passions and desires of individuals are not properly regulated. (Deflem 1989, 628.)

Robert Merton redefines the concept and, in fact, guarantees its widespread use. By anomie Merton refers to the demoralising effects of the continuing situation where the goals we are culturally prescribed do not correspond to the institutionalised means. (Deflem 2007.) As a result, the means are de-institutionalised. Conformity, innovation of new means, ritualistic attachment to old ones, retreat and rebellion – these are different ways of adapting to such situations of mismatch. These different adaptation strategies are unequally distributed across the social strata. (Deflem 1989, 628.)

Anomie (with –e) is a macro concept but there is a corresponding individual level concept as well, thanks to Srole. For Srole, *anomia* (with –a) means "the social psychological mental state of individuals who are confronted with social conditions of anomie", as Deflem (2007) concisely puts it. Nevertheless, it is not at all obvious that there is an empirical link between anomie (macro concept) and anomia (micro concept). As Deflem (1989, 632) points out, Srole does not empirically investigate this relationship. Do abrupt societal transitions foster individual anomia? If so, how long does this persist?

What could all this mean in concrete terms? To illustrate this, let us have a look at Srole's scale of anomia. It comprises five items that were originally supposed to survey the different components of anomia (or social malintegration or interpersonal alienation – Srole uses these as synonyms).

1) *In spite of what some people say, the lot of the average man is getting worse.*
2) *It's hardly fair to bring children into the world with the way things look for the future.*

3) *Nowadays a person has to live pretty much for today and let tomorrow take care of itself.*
4) *These days a person doesn't really know who he can count on.*
5) *There's little use writing to public officials because they aren't really interested in the problems of the average man.* (Srole 1956, 712–713.)

Interestingly, in the ESS3 (module E on well-being), we find two items that seem to have a rather similar orientation than the first two components of the Srole scale:

E42. "The way things are now, I find it hard to be hopeful about the future of the world."

E44. "For most people in [COUNTRY] life is getting worse rather than better."

(The scale for both items is: 1 Agree strongly – 2 Agree – 3 Neither agree nor disagree – 4 Disagree – 5 Disagree strongly)

These two items can be examined together as manifesting the degree of societal pessimism of the respondent in the spirit of Allardt's subjective indicators of 'being'. The concept of societal pessimism can be located in the conceptual tradition of anomie/anomia as developed earlier by Durkheim, Merton and Srole. Societal pessimism can be considered as one of the dimensions of social well-being – of course in such a way, that the opposite, societal *optimism* constitutes the favourable pole of the scale. This would come rather close to what Keyes (1998, 123) suggests by the term social actualisation in his important five-dimensional typology of social well-being. Keyes defines social actualisation as "the evaluation of the potential and the trajectory of society." The items Keyes has used to tap this dimension of social well-being include negative ones, such as "society has stopped making progress", "society isn't improving for people like me" and positive items like "the world is becoming a better place for everyone", "you see society as continually evolving" (Keyes 1998, 138).

The documentation report of the well-being module of ESS3 (module E) suggests that Keyes' work influenced the development of the module (Huppert et al. 2006). The module design team apparently chose a different name for the concept, however, and the term 'societal progress' was adopted (Huppert et al. 2009). Nevertheless, societal pessimism is a more suitable term as it explicitly refers to the subject who is making judgments about the direction that the society seems to be going to. This is what Srole's anomia includes as one subcomponent and what Keyes' social actualisation means.[8]

In practise, the items E42 and E44 were combined for the indicator of societal pessimism and their reversed sum was scaled from 0 to 100 (Cronbach's alpha = 0.600; between-items correlation is 0.429; item-total correlations are −0.841 for E42 and −0.849 for E44). The dichotomous variable on high societal pessimism (18.6% of the

8 For linkage to the recent conceptualisation of social quality, see Walker and van der Maesen 2004, 16–17; see also the collection edited by Beck et al. (2001).

respondents) includes only such respondents who agree with both statements; hence, for being a non-pessimist, it suffices that the agreement decreases with regard to just one of the components.

3.4.4 Recognition: the moral experience of everyday life

The concept of deserving brings the lay explanations of different life events to contact with normative considerations. Attribution of causal responsibility is one side of the coin: to what extent are unemployment, poverty and other miseries of life seen as self-inflicted? How about success? What is the dominant popular perception about the role of luck and other factors that individuals cannot control? The other aspect is normative: is it considered just to redistribute the fruits of individual merit? Is it deemed fair to leave those suffering from bad luck without compensation? (See e.g. Kangas 2000 and White 2010.) Theoretically, it seems plausible to expect that the values and explanatory models embedded in the different welfare regimes would be visible in a comparative examination, for example in terms of the stigma attached to unemployment or the respect with which poor people are treated. In what follows, the concepts of stigma and recognition will be presented in order to sociologically approach the moral experiences of everyday life, a domain which constitutes an important extension to more traditional well-being research.

The notion of *stigma* opens an insightful sociological perspective to well-being and its counter-side, exclusion. Stigma can be defined as a discrediting attribute, which brings with it a risk of marginalisation, status loss and loss of acceptance. What is stigmatised depends on the shared models of understanding in the particular cultural context. (Goffman 1986[1963], 3; Swim and Hyers 2001; Kusow 2007; cf. Pfau-Effinger 2005.) Goffman (1986[1963], 4) distinguishes between three types of stigma: "abominations of the body" such as physical deformities; "blemishes of individual character" (e.g. dishonesty, weak will); and "tribal stigma" linked to religion, nation and the like. Of these it is the stigma related to individual character that is especially interesting in the context of the present study, because it offers conceptual tools for understanding the experiences of inferiority and shame that are common among the unemployed persons. It has been suggested that the popular views about the causes of unemployment, often revolving around the theme of individual shortcomings, are involved in the process of stigmatisation of jobless persons. (Furåker and Blomsterberg 2003, 193–194.) Consequently, unemployment becomes a sign from which it can be inferred that there are faults in individual character, which originally caused the loss of job (cf. Goffman 1986[1963], 4). Stigmatising attitudes that arise out of this kind of reasoning, may, when communicated effectively, lead to feelings and experiences of stigma (Furåker and Blomsterberg 2003, 194). Goffman (1986[1963]) presents an apt illustration of these experiences by a citation from a study by Zawadski and Lazarsfeld. The citation is from a 43-year old mason, dating back to the times of the Great Depression:

> "How hard and humiliating it is to bear the name of an unemployed man. When I go out, I cast down my eyes because I feel myself wholly inferior. When I go along the streets, it seems to me that I can't be compared with an average citizen, that everybody is pointing at me with his finger." (Mason, 43 years) (See Goffman (1986[1963], 17.)

Shame and feelings of inferiority are painfully evident in this account (see also Kortteinen and Tuomikoski 1998). While stigma is an indispensable notion in understanding the moral experiences of everyday life, its linkage to the social and political context of everyday life needs further elaboration. The fairly recent theoretical discussion on *recognition* provides a wider conceptual web that proves to be useful in this respect. Instead of a full account of the whole discussion, only some themes of Axel Honneth's account were selected for presentation, on the basis of their relevance for the present study.[9]

Honneth's contribution to the discussion on recognition can be seen as stemming from the critical theory of the Frankfurt School. Critical theory famously starts from the conviction that, as Thompson (2006, 12) succinctly puts it, "the perspective from which the world is criticized (and may thus be *transcended*) must be rooted (or *immanent*) in that world itself." (Italics original.) The problem in classical critical theory is, according to Honneth, the narrow focus on the sphere of material production; as justice is not just about the distribution of material goods, a broader account is needed. Honneth tries to found the project of critical theory on the domain of moral experiences by arguing that it is there that one can find the immanent seeds of critique. (Anderson 1995, x–xi; Thompson 2006, 12.)

Attempting to reformulate the early Hegelian thoughts concerning inter-subjectivity and drawing on Mead's social psychology and Kant – a shared influence for both Honneth and Goffman – Honneth argues that identity-formation and individual self-realisation are dependent on the development of self-confidence, self-respect and self-esteem. The relationships of mutual recognition are the inter-subjective basis for these modes of relating to oneself: 1) the primary relationships of love and friendship, necessarily limited to our significant others, enable (bodily) self-confidence and provide emotional support; 2) legally institutionalised rights-based relations support self-respect by placing the individual to a position of responsible and autonomous agent; and 3) social relations based on symmetrical esteem and unique individuality foster solidarity and enable the experience of being a valued contributor in shared projects. (Honneth 1995, 128–129; Anderson 1996, xi–xii; Thompson 2006, 24–27, 48–50, 74–77.)

9 Thompson (2006) provides a meticulous critical introduction to the debate, including a presentation of the weak points in Honneth's argumentation, such as the possible psychological foundationalism and the analytical subsumption of redistribution under the umbrella of recognition. It is not possible to enter into these intricacies here.

The idea of developmental potential in recognition as rights and respect (the third aspect) is pertinent to the study of welfare policy – in fact, in this occasion Honneth (1995, 115–118) refers to T. H. Marshall's evolution of citizenship from civil to political and finally to social rights. Respect, expressed by the legally backed system of rights, develops in a two-dimensional space of widening and deepening. Widening means including more people in the system of rights and deepening refers to the extension of the package of rights. Practical capacity to be rationally autonomous implies that a lack of resources is not hindering the process, which is why social rights are, according to Honneth, necessary.[10] (Thompson 2006, 50.) This idea yields theoretical backing to the empirical enterprise of comparing different welfare regimes, characterised by the way social rights are institutionalised, in terms of recognition.

Also the dimension of esteem is relevant for welfare policy. Honneth's esteem is a meritocratic form of recognition. Whereas respect is universally attributed, esteem or social worth is individualising. It can be seen as a reward to an individual for her/his valuable contribution – and the traits and abilities behind it – that has furthered the realisation of societal goals or values. These ethical goals and values comprise the "framework of orientation" that defines the identity of a society by forming its "cultural self-understanding". Honneth does not, however, suppose a unitary community of values. The value horizon or system of a contemporary society is pluralistic but not necessarily egalitarian in this respect: the dominant value conceptions have more say in defining the matrix of esteem or honour according to which individual contributions are valued. (Honneth 1995, 122–123; Thompson 2006, 74–75.)

Especially important for our study is the idea that there are differences between societies in terms of the orienting value systems which, for Honneth, define the identity of a particular society. In some societies individuality is emphasised while in others familial loyalty is more important; some societies are more egalitarian, some more libertarian; tradition is a key value for some societies, whereas innovation and creativity are highly valued in others. (Thompson 2006, 75; cf. Pfau-Effinger 2005.) As different welfare regimes are thought to be based on different value sets, the way esteem is attributed may well vary correspondingly. In addition, the emphasis Honneth attributes to the division of labour is highly fitting for our plan of approaching well-being from the point of view of vulnerable groups. Unemployment, elaborated above in connection with stigma, is likely to diminish the esteem with which one is treated, because "a person's social esteem is measured largely according to what contribution he or she makes to society in the form of formally organized labor" (Honneth 2007, 75). Whereas Goffman may be accused of giving a rather parochial view of stigma, as Titmuss (1974, 45) argues, Honneth's context-sensitive conception of esteem provides a more suitable approach for understanding the relationship between the stigmatising experiences of loss of esteem, vulnerable position in society and the politico-cultural value contexts (welfare regimes).

10 Cf. the idea of positive freedom in social liberalism.

Although Honneth's theory divides recognition into three dimensions, it is not plausible that the data yielded by survey methodology can meaningfully distinguish between all of them, because popular understanding, the target of survey research, is not such a coherent and fine-grained system of thoughts as are works in social or political theory. In addition, it is not necessary to aim at a maximal level of theoretical distinctions in order to extend the understanding of well-being in empirical research. Consequently, the distinction between recognition as respect and esteem is not perpetuated in the empirical part of our study: the moral experiences of everyday life are addressed by a composite variable of several items (recognition, respect, fair treatment), chosen in the first place on the basis of their face validity. We can conclude this section by an idea borrowed from another theorist of recognition, Charles Taylor: recognition, a vital human need, is an integral component of human well-being (Anderson 1995, x).

To return to the level of the questionnaire, three items (E37, E38 and E39, see below) were used to construct the indicator tapping the moral experience of everyday life or recognition:

E37. "Please tell me to what extent you feel that people treat you with respect?"

E38. "Please tell me to what extent you feel that people treat you unfairly?"

E39. "Please tell me to what extent you feel that you get the recognition you deserve for what you do?"

(The scale for all these items is: 0 Not at all – 1 – 2 – 3 – 4 – 5 – 6 A great deal)

The documentation report of the well-being module sheds light on the origins of every item (Huppert et al. 2006). E37 was developed for this survey, while E38 was adopted from Antonovsky's sense of coherence scale. E39 originates from a scale by Siegrist targeting the imbalance between effort and reward. In Allardt's terms, the items are perhaps best described as subjective indicators of 'loving'. In scale construction, E38 was reversed before summing and the sum was scaled from 0 to 100 (Cronbach's alpha = 0.655; the absolute values of the item-item correlations range from 0.298 (E38–E39) to 0.500 (E37–E39); item-total correlations are 0.793 for E37, −0.749 for E38 and 0.775 for E39).

The dichotomous variable 'low recognition' (23.7% of the respondents) includes, in terms of its component items, respondents who gave 'too' positive answers: e.g. even though a respondent felt that she/he got a great deal of recognition, she/he can still be assigned the status of 'low recognition'. The reason for this apparent paradox is that the sum of scores on other components is sufficiently small to qualify for inclusion in the less favourable end of the distribution.

3.4.5 Technical details on other indicators

In addition to the four indicators presented above, four others were constructed to get an encompassing view to the state of European well-being. These indicators are considered an additional element in the study and, consequently, they are not introduced in detail. Indicators on social relations and safety are formulated, with some modifications, on the basis of Fridberg and Kangas (2008a).

Social relations

The items C2 and C4 were combined:

C2. "How often do you meet socially with friends, relatives or work colleagues?" (1 Never – 2 Less than once a month – 3 Once a month – 4 Several times a month – 5 Once a week – 6 Several times a week – 7 Every day)

C4. "Compared to other people of your age, how often would you say you take part in social activities?" (1 Much less than most – 2 Less than most – 3 About the same – 4 More than most – 5 Much more than most)

These items are what Allardt would call objective indicators of 'loving'. The scale of C4 was stretched to fit C2 and their sum was scaled from 0 to 100. Cronbach's alpha = 0.450; between-items correlation is 0.330; item-total correlations are 0.852 (C2) and 0.776 (C4).

Safety

Safety was assessed by a combination of three items (C6, C7 and C9).

C6. "How safe do you – or would you – feel walking alone in this area after dark? Do – or would – you feel..." (1 Very safe – 2 Safe – 3 Unsafe – 4 Very unsafe?)

C7. "How often, if at all, do you worry about your home being burgled?" (1 All or most of the time – 2 Some of the time – 3 Just occasionally – 4 Never)

C9. "How often, if at all, do you worry about becoming a victim of violent crime?" (1 All or most of the time – 2 Some of the time – 3 Just occasionally – 4 Never)

The scale of C6 was reversed and the sum was scaled from 0 to 100. Cronbach's alpha for the scale is 0.687; the absolute values of the inter-item correlations range from 0.351 (C6–C7) to 0.537 (C7–C9); item-total correlations are −0.723 (C6), 0.819 (C7) and 0.809 (C9).

Indicators on social contribution and local ties were put together on the basis of the well-being module by Huppert et al. in ESS3; relevant theoretical background for these items is formed by the discussions on social capital, the theoretical lineage of which can be traced from Aristotle (communal animal, *zōon koinōnikon*), Smith (mutual sympathy and networks), de Tocqueville (associational life) and Durkheim (social bonds and cohesion) to the recent contributors such as Bourdieu, Coleman and Putnam (Halpern 2005, 1–12; see also Norris and Davis 2007).

Social contribution

Three items (E1, E2 and E3) were used in combination to tap respondents' social contribution.

E1. "In the past 12 months, how often did you get involved in work for voluntary or charitable organisations?"

E2. "Not counting anything you do for your family, in your work, or within voluntary organisations, how often, in the past 12 months, did you actively provide help for other people?"

E3. "And in the past 12 months, how often did you help with or attend activities organised in your local area?"

(The scale for all items: 1 At least once a week – 2 At least once a month – 3 At least once every three months – 4 At least once every six months – 5 Less often – 6 Never)

The summed scale was reversed and rescaled from 0 to 100. Cronbach's alpha = 0.676; item-to-item correlations range from 0.397 (E2–E3) to 0.460 (E1–E3); item-total correlations are −0.782 (E1), −0.800 (E2) and −0.762 (E3).

Local ties

For this indicator, the scores of E36 and E45 were summed.

E36. "Please tell me to what extent you feel that people in your local area help one another?" (0 Not at all – 1 – 2 – 3 – 4 – 5 – 6 A great deal)

E45 "I feel close to the people in my local area" (1 Agree strongly – 2 Agree – 3 Neither agree nor disagree – 4 Disagree – 5 Disagree strongly)

The latter was first reversed and stretched to fit E36. The sum was scaled from 0 to 100. Cronbach's alpha = 0.595; item-item correlation is −0.425; item-total correlations are 0.860 (E46) and −0.828 (E45).

4 DATA AND METHODS

This chapter will present the ESS project and ESS3 data set from a technical point of view. Survey methodology will first be given a fairly extensive discussion because in the end it is the data that heavily determines the quality of the study; after this, multilevel modelling is introduced in some detail.

4.1 Data: the European Social Survey round three

The European Social Survey (ESS) is an academically-driven, cross-national survey that is repeated biennially. It was launched in 2001 to complement the data produced by Eurostat in order to produce high-quality data about the temporal dynamics in attitudes, values and behaviour and to secure the foothold of social indicators in the assessment of societal progress (Stoop et al. 2010, 39–40; ESS Data Archive 2011). Each round of the survey consists of the core module, repeated in every round, and rotating modules, each of which has a specific theme. The theme of one of the rotating modules in round three of ESS is, as mentioned above, personal and social well-being (for a detailed documentation of the development of this module, see Huppert et al. 2006), which is the reason why this data (ESS3, edition 3.3, 2.2.2011) was used in this study.

The universe of the study is described as follows in the ESS Documentation report:

> "All persons aged 15 and over resident within private households, regardless of their nationality, citizenship, language or legal status, in the following participating countries: European Union countries – Austria, Belgium, Bulgaria, Cyprus, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Latvia, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom; non-European Union countries: Norway, Switzerland, Russian Federation, Ukraine." (ESS Data Archive 2011, 6.)

The total number of observations is 43,000; observations per country range from 995 (Cyprus) to 2,916 (Germany) (ESS Data Archive 2011, 8–9). Information was collected mainly between August 2006 and October 2007 (own tabulations using the data set), using a standardised questionnaire and face-to-face interviewing; 14 countries used PAPI, 11 countries CAPI. Sample designs could be chosen flexibly, given that strict probability methods were used at all stages. (Stoop et al. 2010, 76–77.) Response rates were typically around 65 percent, ranging from 46 percent (France) to 73 percent (Slovakia and Portugal) (ESS Data Archive 2011); non-response was largely due to refusal (Matsuo et al. 2009, 39).

4.2 Social survey

Social survey, by which we here understand data collection using a standardised questionnaire, is a common method of data collection in comparative welfare research. This is undoubtedly because surveys, when conducted according to the dictates of sampling theory, are able to provide useful data about large groups of people with relatively low costs. The legitimacy of the survey approach seems to depend considerably on the disciplinary field in which the researcher operates. Also the phase of methodological trends is crucial in this respect. For some survey research represents the ugliest face of so-called positivism, while for others it is a cornerstone of unproblematic and realist representation of society. There is neither room nor need to enter deeply into the methodological debate here. In what follows, only some of the most central methodological questions are discussed.

4.2.1 Remarks on methodology

A survey researcher faces fundamental methodological questions; here methodology refers to the philosophical questions that relate to a given method (Byrne 2002, 14; Buckingham and Saunders 2004, 14). Methodological problems include the *epistemological* question about whether or not 'social facts' can be simply observed, discovered and collected by asking questions and recording answers in a systematic fashion. An *ontological* pair to this question is to ask about the mode of existence of these 'facts': do they exist independently of the research process? (Buckingham and Saunders 2004, 15–20, 27.) For example, do we have an opinion on a given issue prior to being asked about it in the study context? Or, to follow a Foucaultian line of thought, is the survey interview instead a relatively recent example of the old tradition of "truth games" that constitutes, besides the truth-telling subject, also the object of study as something that "can and must be thought about" (cf. Foucault 1984, 13–21).

Byrne (2002, 14–15) offers a promising and pragmatic solution to this methodological pair of questions. For Byrne, realism in the simple sense means just that the world exists "separate from our consciousness of it." This, he is careful to point out, is fully compatible with the idea that human action constructs this social world. The social world we have made and keep on making is real. Measurement is social and takes place in social contexts, and the data is constructed, instead of being just discovered. But, and this is the crucial point here, the data is still constructed out of something. In other words, survey measurement does not construct results arbitrarily or *ex nihilo*. Buckingham and Saunders (2004, 24) come close to Byrne's position when they state that "*[w]e cannot define reality in any way that we want, for while observation is mediated by the concepts which we have inside our heads, it is not defined by them*" (original italics). According to Byrne, survey measures, "however imperfectly and incompletely, and through a process of social construction", the constructed and real social world 'as it is'". By this Byrne wants to make a distinction between survey and experimen-

tation, the latter of which entails the intervention and variation introduced by the experimenter. (Byrne 2002, 14.)

It seems that Byrne's account is compatible with the pragmatist idea that there is well room for both more qualitative approaches that help us understand the processes of social meaning-making and world-making and for more quantitative methods that, in our view, emphasise the role of certain inertia in these meanings and in this socially constructed world: this inertia offers enough of temporary stability so that surveys are possible, legitimate and meaningful. Within this pragmatist concord, both the actor's perspective and the more etic statistical perspective are justified, since for both there are valid and interesting questions to study (cf. Bryman 1984, 77–78, 84 and Byrne 2002, 12–13). Buckingham and Saunders (2004, 22) take a similar stance when they maintain that "[t]he stand-off between so-called 'quantitative' and 'qualitative' approaches in sociology is a false dilemma – we can use both." Of course, this is not to say that this position is unproblematic. There are views that question the philosophical basis of this kind of methodical pluralism and emphasise the incompatibility of the two 'paradigms' (Bryman 1984, 79; Rosenberg 1988). But while this old debate goes on, empirical research must proceed.

The issue of *validity* merits some attention as surveys are sometimes criticised for poor validity (see Babbie 2010, 288 and Buckingham and Saunders 2004, 31–34). The concepts of face validity, content validity, predictive validity, construct validity and process validity are used to distinguish between the different facets of validity (Alkula et al. 1999, 91–92; Buckingham and Saunders 2004, 296; Babbie 2010, 153–155). An indicator that seems a reasonable measure of the concept that is being measured has *face validity*. When a measure covers well the different dimensions of the target concept, it does well in terms of *content validity*. In its turn, *predictive validity* (or criterion-related or external validity as it is also called) refers to the relationship between the measure and some external criterion or evidence. *Construct validity* is defined in slightly different ways in methods literature: it is based on the expectations regarding the relationships between variables within the research design (Babbie 2010, 154), or within the composite measure (Buckingham and Saunders 2004, 296); also the idea that the overall study results follow expectations is included in the concept of construct validity (Alkula et al. 1999, 92): as a generalisation of construct validity, one could say that a valid measure yields results that should make sense logically and theoretically. Finally, according to Alkula et al. (1999, 91), the description of all stages of the research process that are relevant to validity, such as conceptual analysis, operationalisation and measurement, contributes itself to validity by making the process more transparent (*process validity*). In conducting the present study, validity has been assessed along the way from all these perspectives, except for the predictive validity approach. Special attention has been given to process validity: the entire research process has been carefully described with the aim of giving the reader a chance to assess the validity of the overall process.

4.2.2 ESS: weighting and non-observation

Sampling is perhaps the most central method-related core issue in survey research, because the legitimacy of the whole process depends, in our view, on the ability to generalise to large populations. The countries of ESS data have used different sampling designs. Some countries have chosen a simple random sample, in which case the inclusion probability is the same for each observation (e.g. Finland). Some countries have more complex sampling strategies and the selection probabilities vary accordingly. At any rate, the effect of sample design is taken into account by the appropriate use of weighting. This is done by the variable 'design weight', calculated as a normed inverse of the selection probability (i.e. analysis weight in standard vocabulary). (ESS [no date].)

Sample sizes are relatively similar in every country. If the data for different countries are combined in analysis, the differences in population sizes should be allowed to influence the calculations. For this purpose the ESS team has included the variable 'population weight' in the data set. This is always combined with 'design weight' by multiplying the two provided sample variables. (ESS [no date].) In the case where the population weight is used, one must observe that the variance estimation using the basic statistical procedures of SPSS becomes highly problematic. It seems that the procedures do not use the real sample counts, but instead the weight-adjusted ones, with harmful consequences. The variance estimates for small countries become inflated, due to the "diminished" number of observations, and estimation turns, consequently, too conservative. The opposite happens with the biggest countries. In SPSS, the *complex samples* module is a way to avoid this nuisance.

Unfortunately, no weight is provided to adjust for the unit non-response, which is one of the biggest methodological shortcomings of the data, and, hence, also this study.[11] Non-response constitutes one part of non-observation in surveys; the other component is undercoverage of the sampling frame (Stoop et al. 2010, 4). Non-observation always implies a potential bias, because it is not justified to assume that the people in a vulnerable or excluded position are adequately represented in the data. As Moisio (2002, 171) points out, it is not likely that people who suffer from deprivation or exclusion in multiple dimensions are adequately represented in survey data. The unemployed tend to be under-represented in surveys (e.g. van den Berg 2004). Non-residential dwellers (e.g. institutional homes for the elderly) are typically excluded from surveys (Stoop et al. 2010, 16) – in this case, where the matter is not non-response but the definition of study population, the analogy between societal exclusion and methodological exclusion is tragically perfect. The homeless people or illegal aliens are, needless to say, difficult to reach by surveys due to undercoverage (see Marlier et al. 2007, 167–168). Some portions of the potential bias could be corrected by weighting, but since the weights are not provided, virtually nothing can be done. Due to this, we do not reach the most vulnerable of the vulnerable, but with some sociological imagination it is

11 For an extensive treatment of the topic in the context of ESS, see Stoop et al. 2010.

easy to guess the direction in which the results of the present study should be adjusted to meet the reality: with all probability, it is worse than it seems.

4.3 Multilevel analysis

Cross-tabulation is a simple but versatile tool for data analysis and it will be used extensively in the present study. However, the key weakness it has is the difficulty arising when multiple variables are simultaneously included in the analysis for elaboration purposes. When more than three variables are involved, it becomes quickly evident that a stronger analytical approach is necessary. The standard regression analysis is one way to proceed from this point, but it has its limitations when applied to complex data, such as the ESS data.

4.3.1 Nested observations

The history of the data must always be remembered as it tells about its structure. This holds with the ESS as well. Since the individual respondents are nested in countries there is a structure in the data that has to be taken into account. The standard regression analysis assumes that the observations are independent, but this is not the case now. In addition, the analytical focus is not solely on the individual level. On the contrary, the characteristics at the country-level are of great interest in our study. It is precisely the life-historical, politico-cultural and geographical closeness that living in a certain kind of welfare regime involves that is at the core of our study. It is methodologically questionable to proceed simply by way of aggregating the individual level data and disaggregating the genuine country-level data, because this does not adequately handle the different levels of data (Hox and Roberts 2011, 4). Multilevel analysis is a suitable way to deal with nested data. Even though it can be considered an extension of regression analysis, it does not require the independence of observations. In fact, its strength is that it takes into account their dependence and the resulting correlation of residuals. (Bickel 2007, xii, 14; Tabachnick and Fidell 2007, 782.) The recent compilation edited by Ervasti et al. (2008) provides many examples of multilevel analyses applied to comparative welfare policy research.

The paradigmatic example of multilevel analysis is educational research. At the first stage of sampling, the primary sampling units ('psu') are schools. At the second stage, the pupils of these schools may be sampled to obtain the individuals to be studied. Of course, all the pupils in these selected schools may be studied, if so decided. The primary motive for multi-stage sampling is financial: instead of including all the schools in the study, it is less expensive to study a limited number of schools. Naturally, this has its costs. The cluster sampling procedure diminishes the efficient sample size as the phenomenon called intra-class correlation (ICC) appears: two random pupils in a given school are, relative to a chosen property, usually more similar with each other than two random students in different schools. When this is not taken adequately

into account, the variance estimates are underestimated, leading to excessively liberal statistical testing. Multilevel analysis corrects this situation in which the risk of false positive inference (type I error) would be inflated due to the design effect of a chosen multi-stage sampling strategy. (Snijders and Bosker 1999, 6–12; Hox 2010, 1–7.)

As we just saw, the phenomenon of nesting is one motive for avoiding the standard OLS-regression approach. Nesting is not, however, just a nuisance. It offers analytical opportunities that merit adequate methodology. Hox and Roberts (2010, 4) describe multilevel analysis as "the application of statistical models for data that have two or more distinct hierarchical levels, with variables at each of these levels, and research interest in relationships that span different levels." In our data, there are key variables both at the individual level (the individual control variables, the dependent well-being variables) and country-level (welfare regime type), and the research questions indeed span the levels. This is why multilevel analysis seems to be a natural methodological choice for this study.

4.3.2 Variance component model

The simplest form of multilevel models is the variance component model, i.e. the null model. This model does not include any independent explanatory variables. The outcome variable is expressed as a sum of the fixed component of the intercept (the grand mean), level 2 residual (country-level deviation from the grand mean) and level 1 residual (individual-level deviation from the country mean). (Hox and Roberts 2011, 6). As the residuals are expressed in terms of their variances, we obtain information about how the total variance is partitioned between the different levels (cf. ANOVA). This also yields the above-mentioned ICC, defined as the proportion that the cluster or group level contributes to the total variance. To continue with the school example, ICC is higher when the schools are fairly different from each other. For example, this is the case of German schools, when they are compared to the Finnish, rather equal schools. (Lehtonen and Malin 2010.) When the different level independent variables are added, the change in the remaining, unexplained variance tells about the effects of the variables. It may be the case that once the individual level controls are introduced, the remaining variance diminishes at both levels. In this case the higher level diminution is due to compositional differences. (See e.g. Eikemo et al. 2008, 57; Gelissen 2008, 256.)

4.3.3 The stratified ESS data and multilevel analysis

There is a theoretical problem that seems to go unacknowledged by those who apply multilevel analysis to ESS data. The structure of this data is not clustered but stratified, because the merged data set is composed of independently sampled national data sets. Some authors do explicitly recommend the use of multilevel analysis in the case of stratified sampling (Klandermans and Smith 2002, 25). Nevertheless, this is, at least

theoretically, problematic. Multilevel analysis typically revolves around the idea that the regression coefficients have two different components. The fixed part of, say, the intercept of the model is the same for each observation. The same applies to slope coefficients. This is just standard regression. But there is more: the other part is random, which means that instead of a single numeric value we have a normal distribution with the expectancy of zero and certain variance (Hox and Roberts 2011, 6). The random components, or effects, vary between the higher level units, which in this case are countries. These units are supposedly sampled from a corresponding sampling frame.

In reality, this never happened with the ESS. The countries were not selected at random from a sampling frame of countries. In the ESS, different countries choose to participate as a result of their own independent decision-making, which is why the list of countries differs in the different waves of the survey. Each ESS data set is, to be precise, a stratified set with an explicitly defined finite population of its own. In other words, there is no randomness involved in the selection of the higher level units. At any rate, it has already become commonplace to apply multilevel analysis to ESS data, which is why this approach is chosen in this study as well. From a theoretical point of view, the concept of super-population might be used here as a rationale. In the superpopulation framework, the finite population of the study is interpreted as a simple random sample from an infinite super-population (Fuller 2009, 342; see also Snijders and Bosker 1999, 3). The countries in our ESS data-set – the real worlds of welfare – are now but one realisation of all the possible worlds of welfare. This is not just a theoretical exercise. It has a practical implication, namely, that the so-called finite population correction must not be used in variance estimation (Smith 2001). The omission of finite population correction naturally makes the inference more conservative, i.e. the probability of false positive inference diminishes.

SPSS (version PASW 17) was used for statistical operations, except for multilevel analyses, which were done using the procedure MIXED of SAS 9.2 (see Singer 1998; Albright and Marinova 2010).

5 WELL-BEING IN EUROPEAN WELFARE REGIMES

The core question of our study is, as mentioned in the introductory chapter, the following: *to what extent does welfare regime make a difference with regard to well-being and its distribution across the social structure in contemporary Europe?* Now that the components and rationale of the question have been discussed, it is time to commence the empirical work. As mentioned above, the analyses are conducted using the data from the European Social Survey round three (ESS 2011), collected in 2006–2007 (for more details, please see chapter 4.1).

The first step of our analytical strategy is a simple cross-country comparison in terms of averages (arithmetic means) of the eight well-being indicators (table 3, p. 48). The objective is to obtain an overview of the state of well-being in Europe before progressing gradually towards narrower and more specific vantage points that shed more light on the core question. In table 3, there seems to appear a rather clear pattern. The results concerning economic hardship, sickness, social relations and safety – our replication dimensions – come close to those Fridberg and Kangas (2008a, 30) reported using ESS1 data (see also Böhnke and Kohler 2010, 636). Denmark, Sweden and Norway have favourable means scores with respect to most of the indicators; Finland lags behind the other Nordic countries, as usual. In contrast, the (Central) Eastern European transition nations are typically found at the opposite end. While the Nordic regime seems to have been successful in maintaining the economic welfare and safety, it is sickness that is somewhat staining this picture, especially in the case of Finland. The citizens of Cyprus, Ireland and the Alpine countries report, on average, lowest levels of self-perceived ill-health. Portugal, doing rather poorly with respect to other indicators, has a culture of strong sociability, with regard to which Cyprus is, surprisingly, a stark contrast.

There is also a methodological lesson to be learned. If one compares Portugal and Cyprus in terms of mean value in sickness (27.0 vs. 13.1), Denmark and Finland in terms of economic hardship (19.6 vs. 39.4) or Estonia and Bulgaria from the point of view of societal pessimism (51.5 vs. 76.3), it is easy to see that there are considerable *within-regime* differences (table 3). This serves as a valuable methodological reminder: classification always hides variation and, hence, does some violence to empirical diversity.

As already mentioned, ESS3 data provides an opportunity to examine the social aspects of well-being in more detail. The big picture sketched above retains its contours as the mean scores of well-being are fairly low in post-socialist countries; the Hungarian atmosphere of local community is a positive exception to this rule (table 3). As usual, the Nordic regime still gains good scores on different indicators. Nevertheless, the local community feeling reveals an anomaly – Finland, again. To continue with the theme of exceptions, the French societal pessimism is rather striking, when compared to how the Hexagone does in terms of other indicators. Ireland succeeds better than the UK in almost all dimensions.

Table 3. *Well-being in Europe. Means scores of the well-being indicators by countries (scales: 0–100).*[a]

	Economic hardship	Sickness	Social relations	Safety	Social contribution	Societal pessimism	Local ties	Recognition
Anglo-Saxon								
Ireland	32.0	15.1	54.6	68.1	35.0	42.2	64.0	75.0
UK	32.4	21.2	56.6	63.8	31.5	55.5	54.0	67.5
Continental								
Austria	37.9	17.1	61.2	74.3	41.8	47.5	64.8	69.0
Belgium	43.0	20.0	56.0	66.1	30.7	60.5	58.5	69.8
France	43.9	21.7	60.9	63.5	32.4	73.5	56.3	71.1
Germany	44.9	24.3	53.4	73.0	37.9	65.0	60.9	68.5
Netherlands	36.8	22.2	61.5	72.3	32.4	50.7	60.3	72.2
Switzerland	38.4	16.2	59.3	76.4	41.4	55.9	63.8	76.1
Eastern								
Bulgaria	70.3	24.0	57.4	53.6	11.0	76.3	60.3	68.6
Estonia	56.9	28.3	49.4	62.7	15.8	51.5	54.0	72.2
Hungary	59.1	29.8	41.8	72.6	15.3	68.1	71.4	76.0
Poland	50.2	26.7	47.6	71.4	14.9	66.5	58.4	68.5
Russian Fed.	63.4	33.5	49.7	63.2	14.8	64.0	56.2	68.3
Slovenia	47.7	29.1	50.4	76.5	35.0	61.9	60.1	68.3
Slovakia	56.0	23.6	52.2	60.7	21.8	59.0	62.1	63.5
Ukraine	68.1	37.9	55.3	64.4	16.9	73.5	61.0	66.4
Nordic								
Denmark	19.6	19.1	61.2	78.1	40.4	41.9	60.8	78.8
Finland	39.4	24.5	57.2	72.5	29.3	47.2	58.3	73.0
Norway	27.2	18.6	63.3	82.3	41.5	42.6	65.6	77.2
Sweden	24.4	20.8	60.1	71.1	31.7	48.8	62.8	75.1
Southern								
Cyprus	45.6	13.1	47.5	80.0	22.3	53.9	62.5	70.2
Portugal	58.6	27.0	63.8	66.6	14.3	70.8	64.0	73.1
Spain	43.8	22.2	58.9	65.2	24.3	53.1	61.7	75.3
All countries	49.7	26.6	54.6	66.9	25.4	62.9	58.8	69.8

[a] The aggregate level item non-response ranges from one percent (sickness) to 6.5 percent (economic hardship).

5.1 Vulnerability and well-being – a bivariate sketch

However useful in terms of getting an overview, examination by averages reveals little about what happens in the margins. Consequently, the next step is to direct focus to the lack of well-being, 'ill-being' – or, more technically, to the less favourable ends of the indicator scores. This analysis is motivated by the observation about the possible vicious circle type of positive feedback between the different dimensions in the process of social exclusion ('spiral of precariousness', 'multiplicative risk', 'cumulative disadvantage'): the idea is that exclusion in one dimension often overlaps with, or brings about, exclusion in terms of another dimension (Kortteinen and Tuomikoski 1998; Vleminckx and Berghman 2001; Tsakloglou and Papadopoulus 2002; Moisio 2002). Hence the perspective of the vulnerable social positions is of key importance.

To simplify the analysis, each indicator was dichotomised at the level of the entire data set by placing the dividing line at about quintile or quartile value, counting from the less favourable end of the distribution (high economic hardship, high scores on sickness, low scores on safety and so forth) (see chapter 3.4; cf. Whelan and Maître 2008, 202). The exact place of demarcation depends on the shape of the distributions.[12] The objective is to examine, first, the lack of well-being *by welfare regimes*; secondly, the lack of well-being *in relation to vulnerable groups*; and, in the next section, the lack of well-being *in relation to vulnerable social positions by welfare regimes*, which will eventually lead us to multivariate analysis.

Once we obtain the groups with high economic hardship, poor health, inactive social relations and so forth, as defined above, we can by a simple cross-tabulation sketch a second overview of European well-being (table 4, p. 50). This time the focus is no longer on the mean values but, instead, on the less favourable ends of the distributions. Instead of mean well-being we are now concentrating on ill-being; countries are dropped away and welfare regimes are brought in.

In table 4 smaller proportions are naturally better, since they indicate better success in welfare policy. Again, the Nordic regime seems to do very well on almost all chosen well-being dimensions, indicated by the comparatively low rates of ill-being. Poor health is fairly frequent, though. In contrast, the Eastern group performs poorly on almost all indicators (i.e. the rates of ill-being are relatively high); economic hardship is conspicuously common (cf. Whelan and Maître 2008, 211–213). A prominent feature of the Anglo-Saxon profile is the combination of a small rate in economic hardship and societal pessimism with a high rate of those who consider the ties in their local communities rather weak – perhaps the liberalist heritage of social atomism has some empirical correlates. High rate of societal pessimism seems to be characteristic for the Continental regime and, looking back to table 3, it is particularly the French experience that has a strongly pessimistic flavour; this is not such a surprise when we

12 For a comparison of different methods of relativisation regarding poverty measurement in Europe, see Kangas and Ritakallio 2007.

recall that, after all, the conceptual history of anomie leads to 19th century France. The Latin rim is distinguished by strong health and social life – the stereotypical idea of a Mediterranean heaven in the contemporary (commercial) imagination – but also with relatively frequent feelings of insecurity (every silver lining has a cloud).

Table 4. *Ill-being in welfare regimes.*[a]

	Anglo-Saxon, %	Continental, %	Eastern, %	Nordic, %	Southern, %	Total, %	X^2	p
High economic hardship	8.5	12.3	44.4	4.5	15.5	25.6	5662.7	#
Poor health	23.6	24.0	37.1	26.0	19.6	29.2	995.0	#
Inactive social relations	24.1	22.0	36.0	15.7	15.0	27.2	1321.7	#
Unsafety	25.6	19.2	23.2	10.5	28.4	22.1	344.2	#
Low social contribution	24.3	17.4	49.3	9.6	28.8	32.3	4267.7	#
High societal pessimism	9.0	20.9	22.8	3.0	10.4	18.6	978.8	#
Weak local ties	35.4	26.6	27.1	22.1	21.8	27.1	236.8	#
Low recognition	27.0	22.5	27.0	10.7	15.1	23.7	467.1	#

[a] Original variables dichotomised at the points shown in the Total column.
# $p < 0.0005$.

The next phase is to examine *how ill-being is distributed across different vulnerable population groups* (see Fridberg and Kangas 2008a; Whelan and Maître 2008, 210). Dummy variables for vulnerable social positions were created, following Fridberg and Kangas (2008a, 44), as follows:

Poorly educated – "Less than lower secondary education" in question F6 ("What is the highest level of education you have achieved?")

Poor – "Finding it difficult on present income" or "Finding it very difficult on present income" in question F33 ("Which of the descriptions on this card comes closest to how you feel about your household's income nowadays?")

Sick – "Yes a lot" or "Yes to some extent" in question C16 ("Are you hampered in your daily activities in any way by any longstanding illness, or disability, infirmity or mental health problem? If yes, is that a lot or to some extent?")

Unemployed – "Unemployed and actively looking for a job" or "Unemployed, wanting a job but not actively looking for a job" in item F8c2 ("Main activity, last 7 days")

Aged – 65 years or more in item F3 1b (age)

Unsafe – "Unsafe" or "Very unsafe" in question C6 ("How safe do you – or would you – feel walking alone in this area after dark?")

Lonely – "No" in question C3 ("Do you have anyone with whom you can discuss intimate and personal matters?")

Immigrants – "No" in question C28 ("Were you born in [country]?")

As seen in table 5, high economic hardship is associated with all vulnerable positions and particularly with unemployment (47% of the unemployed face high economic hardship), sickness (40%) and loneliness (39%). Economic hardship has been found to be one of the explaining factors through which unemployment reduces subjective well-being, thus complementing the direct psychological stress postulated by the deprivation approach (Ervasti and Venetoklis 2010). Also old age, the classic risk factor of poverty, still contributes to the matter (cf. Rowntree 1908, 119–121). It is important to remember that these associations are calculated from the entire data set, pooling all the included countries together. What the between-regime differences are in terms of, say, decommodification of unemployment, will be seen in the next phase of our analysis.

Table 5. *High economic hardship across vulnerable social positions.*[a]

	Rate, %	X^2	p
Poorly educated	32.2	128.6	#
Sick	39.5	1731.1	#
Unemployed	47.1	479.7	#
Aged	31.7	188.9	#
Unsafe	36.1	1089.5	#
Lonely	38.5	355.1	#
Immigrants	29.1	23.1	0.01
Total	25.6		

[a] P-values are presented in detail instead of the traditional levels of significance, because there is no reason to reduce the level of information. The continued usage of rigid p-values is explained by historical inertia induced by the once insufficient calculation power.
# $p < 0.0005$.

Continuing examination with the next indicator, health, shows the anticipated association of old age with poor health (table 6, p. 52). In addition, the poorly educated, poor and lonely suffer remarkably often from health problems. One explanation for why the unemployed and immigrants relatively rarely have poor health is age: respondents categorised into these groups are, on average, younger than those in other vulnerable groups. The well-known limitations of cross-tabulations in multivariate settings are becoming manifest, since age seems to operate behind the backs of the other positions in bivariate analysis – as promised, a methodological remedy follows, but slightly later.

Table 6. *Poor health across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	48.9	1141.2	#
Poor	43.8	2252.5	#
Unemployed	22.8	39.8	#
Aged	58.2	4055.7	#
Unsafe	39.3	978.4	#
Lonely	43.3	405.9	#
Immigrants	24.5	40.0	#
Total	29.2		

# $p < 0.0005$.

Sickness, poverty and old age are associated with inactive social relations (table 7). Also those who experience insecurity are relatively often passive in their social lives. By way of contrast, unemployment does not have a statistically significant association with social inactivity – a possible explanation could be built on the need of social contacts, felt acutely when occupational contacts vanish, and the abundant time resources.

Table 7. *Inactive social relations across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	28.8	8.3	0.062
Sick	37.1	822.7	#
Poor	36.7	970.3	#
Unemployed	25.5	2.7	0.342
Aged	35.5	332.4	#
Unsafe	32.1	231.1	#
Immigrants	28.6	3.6	0.294
Total	27.2		

# $p < 0.0005$.

Looking at the relationship between vulnerable social position and feelings of high insecurity (table 8), one is led to conclude that the associations are, all in all, somewhat weak. Among these variables, poor education, sickness and poverty are the best predictors of increased feelings of insecurity.

Table 8. *Feelings of high insecurity across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	29.7	199.0	#
Sick	29.5	511.9	#
Poor	28.4	494.2	#
Unemployed	22.4	0.1	0.845
Aged	25.8	74.4	#
Lonely	26.5	46.5	#
Immigrants	22.2	0.0	0.981
Total	22.1		

# $p < 0.0005$.

In what follows, we turn to the indicators of social well-being, based on the ESS3 well-being module. Lonely people are, quite expectedly, often passive in terms of social contribution (table 9). Also poverty and poor education predict low social contribution.

Table 9. *Low social contribution across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	44.2	389.9	#
Sick	37.1	185.5	#
Poor	45.7	550.4	#
Unemployed	38.4	34.4	0.001
Aged	41.5	377.9	#
Unsafe	40.4	583.6	#
Lonely	46.3	388.9	#
Immigrants	32.8	0.5	0.705
Total	32.3		

# $p < 0.0005$.

The disposition to societal pessimism among the unemployed and poor is easy to understand (table 10, p. 54). If the respondents attribute the causes of their unemployment to the way society and economy function, it is hardly surprising that the visions about societal development are somewhat sombre. Neither are those who blame themselves for unemployment likely to radiate with hope and optimism. (Cf. van Oorschot and Halman 2000.) A dire economic situation, in its turn, might well usher in such despair and hopelessness that the way society is developing seems uninviting. The immigrant population seems to be a positive exception: they are less pessimistic than average.

Table 10. *High societal pessimism across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	22.5	58.2	#
Sick	26.7	720.5	#
Poor	28.3	1331.5	#
Unemployed	29.1	145.3	#
Aged	23.5	147.5	#
Unsafe	25.1	503.7	#
Lonely	26.0	147.4	#
Immigrants	14.9	31.3	0.002
Total	18.6		

# $p < 0.0005$.

The association between weak local ties and loneliness (table 11) is natural and predictable (perhaps even conceptual). Also unemployment, insecurity and an immigration background are associated with weakness of local ties, but, interestingly enough, higher age – or the corresponding cohort membership – seems to alter the experience to a more positive direction.

Table 11. *Weak local ties across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	23.4	39.7	#
Sick	28.3	12.2	0.045
Poor	30.4	121.6	#
Unemployed	34.4	52.2	#
Aged	21.1	178.9	#
Unsafe	32.7	286.7	#
Lonely	37.8	234.1	#
Immigrants	32.7	56.3	#
Total	27.1		

# $p < 0.0005$.

Recognition – the moral flavour of our inter-personal everyday life – varies depending on the position in society, which is something one could easily expect (table 12). Old age is associated with more recognition; in contrast, the lonely and unemployed people often face misrecognition. Thus, the ideas of Goffman and Honneth about occupational status and recognition receive empirical backing from our data. The

popular policy discourse according to which unemployment does not substantially reduce subjective well-being (see Ervasti and Venetoklis 2010) receives contrary evidence from these findings: given that we know how important social relationships are for happiness and life satisfaction – the two commonly used global measures of subjective well-being – low recognition is likely to indicate overall subjective ill-being.

Table 12. *Low recognition across vulnerable social positions.*

	Rate, %	X^2	p
Poorly educated	23.7	0.0	0.97
Sick	29.0	262.1	#
Poor	33.3	1088.1	#
Unemployed	39.8	276.3	#
Aged	19.2	103.7	#
Unsafe	30.2	423.6	#
Lonely	40.3	610.0	#
Immigrants	28.2	39.4	#
Total	23.7		

# $p < 0.0005$.

This far the objective has been to get a broad overview of the matter. From now on the analysis aims for more depth and, consequently, the scope is narrowed down to four indicators, namely economic hardship, sickness, societal pessimism and recognition. In what follows, each of these aspects of well-being will be taken in turn, starting from economic hardship. The presentation of each dimension is structurally similar: a multilevel multivariate analysis follows after an illustrated regime-specific cross-tabulation, while an introduction of selected earlier studies opens each section.

5.2 Economic hardship

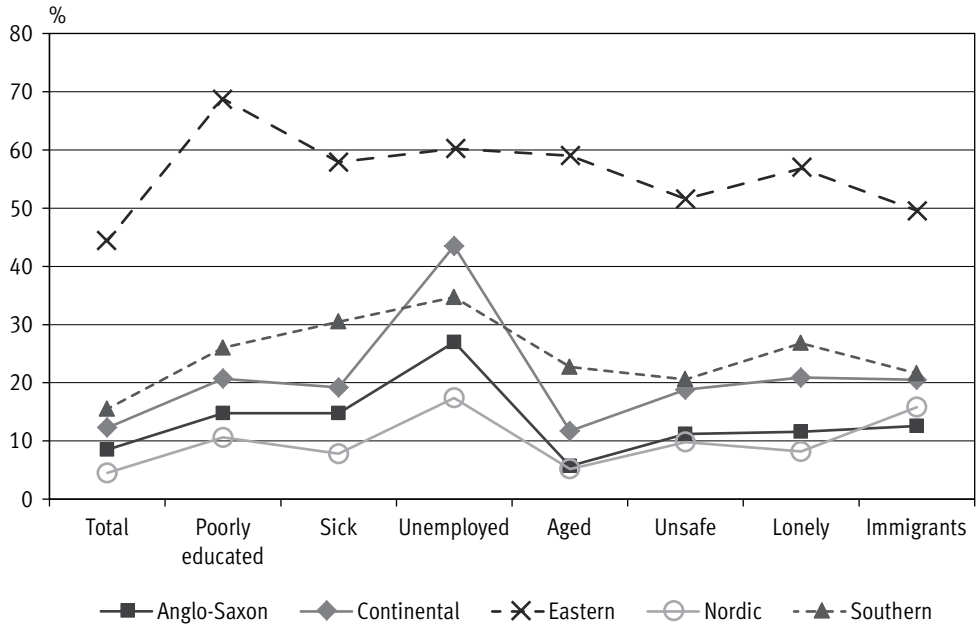
Böhnke and Kohler (2010, 636–638) approached well-being multi-dimensionally and compared EU countries in terms of different well-being components, using the data from the European Quality of Life Survey (EQLS) 2003. Using the median of the net household equivalence income in purchasing power standards they compared income levels across the countries. According to their findings, the living standards are typically clearly lower in the new member states than in the other EU countries. Also the Iberian countries are located below the average of the old member states. Omitting Luxembourg, the top rankings were occupied by Denmark, the Netherlands, Sweden and Finland.

Whelan and Maître (2008, 205) obtained results that are fairly similar to those of Böhnke and Kohler by ranking countries in terms of mean deprivation on ten items (EQLS 2003 data). The deprivation index is lower in the older member states (especially in Denmark, Austria, the Netherland and Sweden), considerably higher in Portugal and typically high in the new member states.

Using ESS1 data, Fridberg and Kangas (2008a, 40–41) found that the relationships between chosen welfare components and vulnerable social positions vary across welfare regimes. In the Nordic regime the associations between poverty and vulnerable social positions are weak; unemployment exposes to poverty but the link is not strong. In the Continental regime unemployment is strongly related to poverty, and also other vulnerable positions do expose to poverty, but fairly weakly. In the case of the Anglo-Saxon regime, unemployment and loneliness are the positions that are most severely exposed to poverty; also other links exist, but they are clearly weaker. Finally, in the Southern and Eastern European regimes, almost all vulnerable positions are strongly associated to poverty; unemployment is again the strongest factor.

Turning to our analysis of ESS3 data, figure 1 presents the rates of high economic hardship, as defined above by dichotomised variables, in different vulnerable social groups for each welfare regime. There are clear and expected differences between the regimes in economic hardship: the total rate of severe economic hardship in the Southern regime (16%) is about the same as the Nordic rate for the unemployed (17%) and the post-socialist countries are in an unfortunate class of their own with a total rate of 44%. Exposure to severe economic hardship hits the unemployed people harder than any other vulnerable

Figure 1. *Severe economic hardship across vulnerable social positions in different welfare regimes.*



social position in almost all regimes (see the peaks in profile lines in figure 1). The effect is especially pronounced in the Continental welfare regime, where the rate of economic direness among the unemployed (44%) is clearly higher than for other vulnerable positions. Nevertheless, in post-Socialist Europe it is poor education that is most visibly associated with poor economic welfare – it should be noticed that in the Eastern regime the poor education group is, for some reason, very small (cf. Marlier et al. 2007, 76). This may be part of the explanation for the pronounced association.

The Beveridgean basic security pension schemes (the UK and Ireland) produce a more equal inter-generational distribution of economic welfare than the Bismarckian (and gerontocratic) status maintenance approach of Spain and Portugal (Bahle et al. 2010, 587; Hinrichs and Lynch 2010, 358–359). This is visible in the rates of severe economic hardship among the elderly: in the Latin rim regime the rate (23%) is clearly higher compared to the regime total (16%), whereas in the Anglo-Saxon regime the rate among elderly (6%) is lower than the regime total (9%). Sickness has a roughly similar hardship profile as old age. Poor health is more strongly associated with economic hardship in the less developed welfare policy models, when judged against the regime total level. Curiously, the group of post-socialist countries does not distribute the risk of economic hardship differentially between the classic risk factors of sickness, old age and unemployment, whereas other regimes alleviate the economic hardship of sickness and old age more than that of unemployment.

Multivariate analysis by means of multilevel regression sheds more light on the phenomenon of economic hardship in Europe. The model building approach was inspired by the study of Fridberg and Kangas (2008a) and realised using the procedure PROC MIXED of SAS 9.2. First, a null model was calculated in order to separate the variance to an individual level part and country level part. Intra-class correlation (ICC) was obtained by dividing the country level variance by the total variance (Hox 2010, 15): if ICC = 1, the countries are homogeneous with respect to the variable in question (economic hardship) and all variance is of the between-countries type; if ICC = 0, country level does not induce any homogeneity in terms of economic hardship. Deviance (–2 LL) is a *smaller-is-better* index of the overall model fit (Bickel 2007, 93). Proportional reduction in variance (PRV) indicates how much models 1 and 2 explain the variance of the null model at both levels. Model 1 includes only individual level variables, including both the typical control variables (age, gender, years of education, domicile type, living with partner) and vulnerable position memberships. Poor education and old age are not included as dummies since there are continuous variables for age and education years in the model; dummy 'poverty' is naturally not included when hardship is the dependent variable and, similarly, dummy 'sickness' is not included with sickness. Model 2 adds welfare regime classification as a country level variable to model 1.

As indicated by the ICC of model 0, the between-countries variance constitutes about one fourth of the total variance in economic hardship (table 13, p. 58). In more concrete terms this means that the included *European countries are relatively heterogeneous in*

this respect: in some countries the self-perceived economic situation is generally better whereas in others economic hardship is widespread. This observation was already evident in table 3 (p. 48) where the range of mean economic hardship extended from 19.6 (Denmark) to 70.3 (Bulgaria). Including the individual level variables in the model yields a 12 percent reduction in individual level variance and a reduction of one-fifth in the country level variance, which signals the extent of compositional effects on the between-countries differences. In other words, the fact that there are differences between countries in economic welfare is partly explained by the differences in the composition in terms of individual level characteristics; the other side of the coin is that there are also differences not explained by such factors (or at least by those included here). Adding the welfare regime classification produces no extra reduction in the individual level variance – it is a country level variable, after all – but it contributes greatly to the reduction of country-level variance (the residual ICC drops from 24 to 7%). Welfare regime type seems to matter when we are explaining economic welfare.

Table 13. *Hardship, multilevel models 0, 1 and 2.*

	Variance components				PRV	
Hardship	**Country level**	**Individual level**	**ICC**	**–2LL**	**Country level, %**	**Individual level, %**
Model 0	185.5	538.8	0.26	390634.4	.	.
Model 1	150.3	472.7	0.24	370040.2	19.0	12.3
Model 2	35.6	472.7	0.07	369986.4	80.8	12.3

Model 0: null model, a.k.a variance components model; Model 1: Individual level control variables; Model 2: Model 1 + welfare regime classification.
ICC: intraclass correlation; PRV: Proportional reduction in variance components, compared to null model.

Looking at table 14, which portrays the fixed regression coefficients of the model 2, it can be summarised that being male, education and living with a partner reduce economic hardship, whereas an immigration background, sickness and loneliness increase it. Age has a curvilinear relationship to economic hardship (graphically a downward opening parabola) with a peak effect of impoverishment at about fifty years. Unemployment is a strong factor behind economically dire situations as it adds, on average, 14 points to the indicator of economic hardship (ranging from 0 to 100). When we add this evidence to that yielded by figure 1 and table 3, *we can safely conclude that unemployment is a major risk factor of economic hardship in contemporary Europe*.

Welfare regime makes a difference as well (table 14). There are no significant differences between the Nordic, Continental and Anglo-Saxon models in this respect, but living in the Latin rim (or better, the Iberian rim plus Cyprus) adds about 20 points to the hardship indicator when compared to the Nordic one; Eastern European regime does worse still, adding some thirty points.

Table 14. *Economic hardship, fixed regression coefficients from model 2.*

	Hardship	
	B	**p**
Intercept	30.172	#
Individual level		
Age	0.597	#
Age squared	−0.006	#
Male (= 1)	−2.629	#
Full time education (yrs)	−1.092	#
Domicile (type III test)	.	#
Big city	−1.068	0.104
Suburbs, outskirts of big city	−1.804	0.008
Town, small city	−0.311	0.621
Country village	−0.350	0.580
Farm, home in countryside	ref	.
Lives with partner (= 1)	−4.377	#
Immigrant (= 1)	4.784	#
Sick (= 1)	7.293	#
Poor (= 1)	n.i.	.
Unemployed (= 1)	13.992	#
Lonely (= 1)	4.420	#
Country level		
Welfare regime (type III test)	.	#
Anglo-Saxon	4.825	0.357
Continental	12.809	0.001
Eastern	28.850	#
Southern	19.314	#
Nordic	ref	.

# $p < 0.0001$; ref. = reference category; n.i. = not included.

But how do the effects of vulnerable social positions on economic hardship differ by regimes? On the basis of figure 1, one would expect that the Continental regime exposes the unemployed persons relatively strongly to economic hardship, whereas in the Eastern regime this effect should be fairly small. Table 15 (p. 60) provides multivariate evidence for the Continental scenario: *the Bismarckian model indeed heightens the economic direness of the unemployed relatively more than other models*. The Eastern group but also the Southern and Nordic regimes are less punitive in this respect. The Anglo-Saxon group is characterised by the result that sickness predicts economic

Table 15. *Hardship, fixed regression coefficients from model 1, calculated separately for each regime.*

	Anglo-Saxon		Continental		Eastern		Southern		Nordic	
	B	p	B	p	B	p	B	p	B	p
Intercept	45.209	0.045	50.557	#	54.546	#	51.111	0.007	40.839	0.003
Individual level										
Age	0.141	0.220	0.466	#	0.795	#	0.347	0.001	0.011	0.885
Age squared	−0.003	0.030	−0.005	#	−0.007	#	−0.003	0.003	−0.001	0.009
Male (= 1)	−1.695	0.021	−1.177	0.002	−3.843	#	−3.033	#	−4.179	#
Full time education (yrs)	−1.066	#	−1.267	#	−0.885	#	−1.060	#	−0.555	#
Domicile (type III test)	.	0.231	.	#	.	#	.	0.035	.	0.143
Big city	4.626	0.037	−0.436	0.703	−7.789	#	2.741	0.159	1.168	0.194
Suburbs, outskirts of big city	1.708	0.357	−4.354	0.0002	−3.786	0.033	−0.832	0.701	−0.672	0.416
Town, small city	2.652	0.140	−0.852	0.432	−5.907	0.0003	2.733	0.151	0.746	0.321
Country village	2.188	0.243	−3.184	0.003	−3.571	0.027	1.715	0.361	−0.059	0.943
Farm, home in countryside	ref	.	ref	.	ref	.	ref	.	ref	.
Lives with partner (= 1)	−6.124	#	−4.870	#	−2.955	#	−3.510	#	−6.363	#
Immigrant (= 1)	4.058	0.001	5.706	#	1.359	0.076	7.772	#	10.485	#
Sick (= 1)	10.401	#	6.116	#	6.653	#	5.664	#	5.613	#
Poor (= 1)	n.i.	.	n.i.	.	n.i.	.	n.i.	.	n.i.	.
Unemployed (= 1)	13.573	#	15.662	#	12.085	#	11.368	#	11.955	#
Lonely (= 1)	3.614	0.014	5.915	#	3.860	#	4.206	0.001	4.927	#

# $p < 0.0001$; ref. = reference category; n.i. = not included.

hardship with almost the same strength as unemployment (cf. Pfoertner 2010). Age and education are, in comparative terms, less tied to economic problems in the Nordic welfare regime, which gives evidence to the view that there is still something left of the characteristically Nordic heritage of relatively equal distribution of economic resources (cf. Fritzell 2008, 39). On the other hand, an immigration background is rather strong a predictor of economic direness in the Nordic model, which can be seen, on a closer look, also in figure 1 (10.5 extra points, cf. 4.8 on average in model 2). The boundaries of Nordic welfare seem to be relatively strong.

5.3 Sickness

Insofar as welfare policy aims to improve the possibilities with which the citizens – or, more broadly, denizens – can lead a good life, the cross-national differences in health levels and inequalities function as central evidence in the evaluation of policy performance. What is at stake is more than just health care. As the social position of persons is linked to their morbidity and mortality risks, the social structure of society has a concrete impact on the distribution of life chances. It is not surprising, then, that health care is just one – and probably not the most important – of the societal factors (e.g. labour market, family) that are involved in the production of the levels and distributions of morbidity. (Lundberg and Lahelma 2001, 42–43; see Ferrera 2005, 43.) Subsequently, there is no doubt about the necessity of including health as one of the well-being components in a comparative welfare study.

The report on European health inequalities, commissioned by the UK during the 2005 EU presidency (Mackenbach 2006) summarises that low education, income and socio-economic position are associated to higher morbidity and mortality in Europe. In addition, health inequality has been widening during the past decades. The exposure of lower socio-economic groups to "a wide range of unfavourable material, psychosocial and behavioural risk factors" was considered the main cause of health inequalities. More specifically, differences in cardio-vascular mortality were found to explain about half of the excess mortality of the lower socio-economic groups. The author explained the persistence of this linkage in countries with a long history of welfare policy by the idea that such inequalities "must be deeply rooted in the social stratification systems of modern societies" (Mackenbach 2006, 41).

In their review and re-analysis of the first large-scale European comparative study on health inequalities, Lundberg and Lahelma (2001, 48) concluded that the Nordic countries are on a par with Western Europe when it comes to health inequalities in terms of social classes or education level. But when analysed on the basis of economic situation, health differentials are somewhat smaller in the Nordic group.

Approaching health by means of self-rated health (EQSL 2003 data), Böhnke and Kohler (2008, 636–637) came to the conclusion that people living in the European transformation economies report a considerably lower health status than people in old

EU member states. Of the Southern regime countries, Portugal was characterised by a relatively low proportion of people in good health; Spain and Cyprus, on the other hand, did better than average. Finland and Sweden were located around average, Denmark somewhat higher.

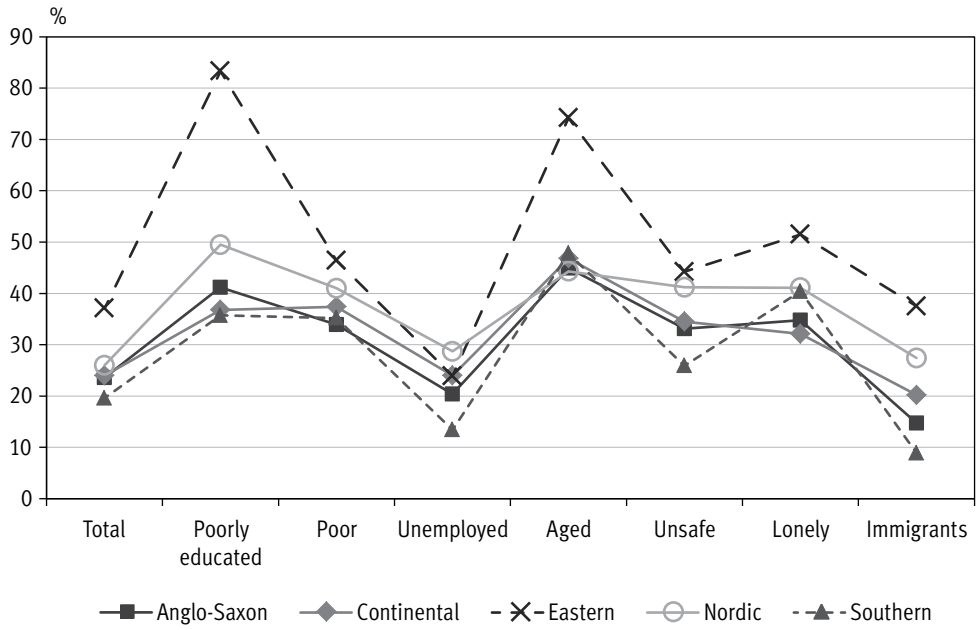
Eikemo et al. (2008) compared European countries in terms of self-reported health and examined the extent to which the between-country differences could be explained by compositional effects and country level factors (pooled ESS1 + ESS2 data). The rates of reported poor health were found to be highest in the Eastern European countries and Portugal, while the Nordic countries are situated in the healthier half of the list; Finland is, this time, doing best among her peers. Other regimes are somewhat less clustered in the list. Ireland, Switzerland and Austria are the three countries with lowest rates of self-reported poor health. Multivariate (and multilevel) analysis showed that about one third of the between-country differences are accounted for by the individual level variables (composition effect). Regime classification contributes slightly less to the explanation of country level variance (19%) than a more extensive set of country characteristics (31%; natural logarithm of population size, GDP/capita, total health expenditure/capita). In a multivariate setting, only the Eastern European group differs in a statistically significant extent from the others. (Eikemo et al. 2008, 55, 58–59.)

In their study on welfare policy and social exclusion, Fridberg and Kangas (2008a, 40–41) found that many vulnerable positions (poor education, poverty, unemployment, old age, loneliness) are linked to poor health in the Nordic regime; in the Continental regime the situation is, roughly speaking, similar from this point of view. The Anglo-Saxon regime does better as only unemployment and old age are strongly associated with sickness and the Southern regime succeeds even better still: only the natural link between old age and sickness remains strong. In contrast, the Eastern European group is, once again, less successful in the comparison, morbidity being closely related to all vulnerable positions.

It seems that the socio-political context makes a significant difference for the dynamics of social position and health. This idea receives further corroboration from a recent multilevel study conducted by Levecque et al. (2011). The objective of the study was to examine the relationship between economic hardship and depression in different welfare regimes on the basis of ESS3 data. The authors conclude that economic hardship is clearly more strongly associated to depression in the liberal regime than in other regimes. Also the mediating role of age varies at the regime level. (Levecque et al. 2011, 262, 271–274.)

Figure 2 illustrates the results of our cross-tabulation analyses concerning sickness. The rates of high scores on the dichotomous sickness indicator for each chosen vulnerable social position in different welfare regimes are portrayed by coloured lines. The overall shape of the regime profiles – two morbidity peaks, one for poor education and the other for old age – is largely explained by the observation that the people with poor education are, on average, almost twenty years older than the rest.

Figure 2. *Rates of sickness (high scores) across vulnerable social positions in different welfare regimes.*



Rates of poor health are typically lowest in the Southern regime, except for lonely people. Might it be that the culture of sociability that, partly, maintains good overall health becomes an etiological factor for those who have fallen out of its web? The Anglo-Saxon and Continental profiles of vulnerability-to-sickness association are close to each other and not far from the Latin rim profile. Even though the *total* rates of ill-health are about the same in the Nordic, Continental and Anglo-Saxon profiles, the Nordic regime seems to have been less successful in alleviating the risk of heightened morbidity associated with many vulnerable social positions. In fact, the rate of poor health among the unemployed is highest in the Northern regime, 29 percent (cf. Fridberg and Kangas 2008a, 35). In Eastern Europe, sickness rates are generally above those of the other countries, except in the case of the unemployed.

Next we continue the examination by means of multivariate tools. The intraclass correlation is this time only 5 percent for sickness, which means that *countries are relatively homogeneous from this point of view* (table 16, p. 64).[13] In other words, the majority of variance is found at the individual level. Including the individual level variables into the model yields a reduction of 50 percent to the country-level variance (model 1). This indicates that a large part of the already small variance was due to differences in demographic and other included individual level factors (cf. Eikemo et al. 2008). Welfare regime classification makes a minor contribution (model 2) to variance reduction, pushing the level of explained country-level variance up to 63 percent.

13 For economic hardship ICC was considerably larger, 26%.

Table 16. *Sickness, multilevel models 0, 1 and 2.*

	Variance components				PRV	
Sickness	**Country level**	**Individual level**	**ICC**	**–2LL**	**Country level, %**	**Individual level, %**
Model 0	32.8	605.9	0.05	418585.3	.	.
Model 1	16.5	456.8	0.03	387786.7	49.8	24.6
Model 2	12.0	456.7	0.03	387761.8	63.4	24.6

Model 0: null model, a.k.a variance components model; Model 1: Individual level control variables; Model 2: Model 1 + welfare regime classification.
ICC: intraclass correlation; PRV: Proportional reduction in variance components, compared to null model.

Age has an almost linear relationship with sickness, every ten years adding some 2.5 points to the sickness score (table 17). Being male, additional years of education and being an immigrant are associated to a better health status. Unemployment has no independent impact at the level of the pooled data set, but loneliness (almost 4 extra points) and poverty (8.5 extra points) are rather strongly linked to poor health. The only significant country level impact comes with living in the Eastern European transition countries, which was something one could expect on the basis of figure 2 and earlier studies; from the Nordic perspective this effect is about the same size as that of being lonely or that of twenty additional years of age.

The next questions deal, logically, with the extent to which there are regime differences in the individual level effects: are unemployment and an immigration background associated with poor health more strongly in the Nordic regime, as figure 2 seems to suggest? The fixed regression coefficients of model 1, calculated separately for each regime, yield evidence for an affirmative answer. A part of the explanation in the case of unemployment may be, as Fridberg and Kangas (2008a, 35) suggest, that in the Nordic regime the level of unemployment is lower than elsewhere, which may imply a more selected group.[14] Curiously, also an immigrant background has a negative health impact in the Nordic regime, of about the same magnitude as unemployment. The explanation for this is not clear at the moment.

Loneliness does have a relatively sharp adverse impact on health in the Latin rim, more than twice the size of the corresponding effect in the Nordic regime (table 18, p. 66). Poverty has a smaller health damaging contribution in the Eastern and Southern groups, when compared with the other regimes (cf. Pfoertner 2010). Also this time the size of the group may be part of the explanation, as economic hardship is fairly common in both regimes. In other regimes we are talking about a more selected group.

14 In our data: 3.2% for the Nordic regime vs. 4.6% for the whole data-set – a serious underestimation, of course, most likely due to differential non-response.

Table 17. *Sickness, fixed regression coefficients from model 2.*

	Sickness	
	B	**p**
Intercept	9.554	0.0002
Individual level		
Age	0.249	#
Age squared	0.003	#
Male (= 1)	−2.319	#
Full time education (yrs)	−0.507	#
Domicile (type III test)	.	0.004
Big city	−0.410	0.515
Suburbs, outskirts of big city	−0.260	0.691
Town, small city	−0.709	0.241
Country village	0.270	0.657
Farm, home in countryside	ref.	.
Lives with partner (= 1)	−1.177	#
Immigrant (= 1)	−2.506	#
Sick (= 1)	n.i.	.
Poor (= 1)	8.505	#
Unemployed (= 1)	−0.296	0.550
Lonely (= 1)	3.964	#
Country level		
Welfare regime (type III test)	.	0.016
Anglo-Saxon	−1.626	0.601
Continental	−0.148	0.949
Eastern	4.824	0.030
Southern	−1.636	0.563
Nordic	ref.	.

# $p < 0.0001$; ref. = reference category; n.i. = not included.

Table 18. *Sickness, fixed regression coefficients from model 1, calculated separately for each regime.*

	Anglo-Saxon		Continental		Eastern		Southern		Nordic	
	B	p	B	p	B	p	B	p	B	p
Intercept	8.647	0.272	11.983	0.002	16.468	0.0003	13.717	0.069	12.746	0.009
Individual level										
Age	0.301	0.009	0.105	0.070	0.245	#	0.058	0.506	0.260	0.001
Age squared	0.001	0.273	0.003	#	0.004	#	0.004	#	0.001	0.236
Male (= 1)	1.137	0.128	−1.228	0.001	−4.006	#	−3.843	#	−2.105	#
Full time education (yrs)	−0.618	#	−0.324	#	−0.725	#	−0.404	#	−0.570	#
Domicile (type III test)	.	0.076	.	0.013	.	0.001	.	0.743	.	0.597
Big city	3.462	0.128	0.258	0.811	−3.129	0.045	−0.848	0.627	0.289	0.763
Suburbs, outskirts of big city	2.391	0.206	−0.730	0.505	−3.484	0.040	−0.134	0.945	0.500	0.570
Town, small city	0.561	0.761	−1.363	0.182	−2.280	0.141	−1.343	0.430	1.034	0.196
Country village	0.123	0.949	−0.096	0.926	−1.308	0.398	−0.659	0.695	1.131	0.193
Farm, home in countryside	ref.	.	ref.	.	ref.	.	ref.	.	ref.	.
Lives with partner (= 1)	−2.834	0.002	−1.464	0.001	0.401	0.320	−0.756	0.249	−0.871	0.148
Immigrant (= 1)	−3.660	0.003	−2.564	#	−3.187	#	−3.117	0.002	2.040	0.036
Sick (= 1)	n.i.	.	n.i.	.	n.i.	.	n.i.	.	n.i.	.
Poor (= 1)	10.568	#	9.534	#	6.566	#	6.744	#	10.181	#
Unemployed (= 1)	−0.378	0.848	−0.072	0.931	−1.005	0.258	0.367	0.781	2.206	0.130
Lonely (= 1)	3.103	0.036	2.745	#	4.462	#	7.727	#	3.452	0.001

# $p < 0.0001$; ref. = reference category; n.i. = not included.

5.4 Societal pessimism

European future visions are somewhat sombre, even to the extent that some have seen in this 'social pessimism' a key for understanding 'the new social reality of Europe' (Liddle 2008).[15] According to a fairly recent Eurobarometer poll, almost two-thirds of Europeans believe that, in comparison to their own lives, life will be more difficult for the next generation, while just 17 percent think life will get easier (Eurobarometer 2007, 49). The most common worry-generating topics were unemployment, pensions, costs of living, crime and the environment. Cross-country comparison reveals curious differences: countries that have managed to, so to speak, catch-up or are rapidly advancing (the Nordic late-comer Finland; the Baltic states; Ireland, Portugal and Spain) were found to be more optimistic than average, whereas in France, Germany, Belgium and the Netherlands the visions were, overall, relatively pessimistic. The other Eastern European transition nations were located typically between these extremes. (Eurobarometer 2007; Liddle 2009, 96.)

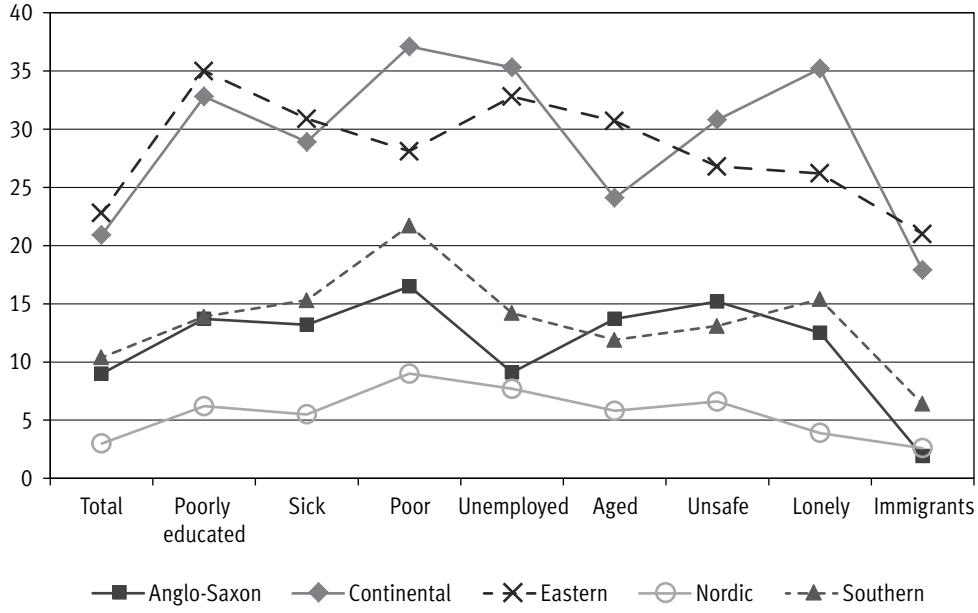
Our analyses are partly in line with the results of the Eurobarometer report. Looking back to table 3 (p. 48), we can see that the mean levels of societal pessimism are quite low in the Nordic countries and especially in Norway and Denmark. The levels are higher than average in France and Germany, but this does not hold for the Netherlands. In our data, the picture of Portuguese social visions is clearly less bright than in Eurobarometer and the overall impression of the transition nations is somewhat bleaker, with the exception of the more upbeat Estonia. The Anglo-Saxon societal climate is relatively optimistic, especially in Ireland.

Figure 3 (p. 68) enables us to disentangle some of the main contours of structural distribution of societal pessimism. Welfare regimes can be grouped into three categories, which are, in order of descending levels of pessimism: the Eastern and Central European group; the Southern and Anglo-Saxon group; the Nordic group. Poverty is the position that is most strongly linked to high societal pessimism, except for the Eastern regime, where poverty is much more common than elsewhere and, hence, the implied polarisation or marginalisation is less demoralising (cf. Böhnke 2008, 325).

The way unemployment predicts high levels of societal pessimism depends on the socio-political context. It is natural that the impact is most stringent in the Continental regime: as the sphere of institutionalised solidarity is occupationally bounded, dropping out of it may indeed downgrade the expectations concerning societal progress. In the Southern and Anglo-Saxon regimes, on the other hand, the corresponding effects are vanishingly small. Continental loneliness is of a remarkably pessimistic kind and the same is true, with a slightly lesser emphasis, in the Southern regime. The distinguishing feature of the Anglo-Saxon regime is the somewhat pronounced connection of insecurity and societal pessimism.

15 The data concerns the Europe of 2006 and 2007, i.e. the time before the financial crisis. We may legitimately expect that societal pessimism has been negatively affected by the development.

Figure 3. *High societal pessimism across vulnerable social positions in different welfare regimes.*



Source: ESS3.

Next we turn to multivariate methodology in order to gain a more detailed interpretation of European societal pessimism. *There are considerable differences between countries in terms of how people evaluate the societal trajectory*: more specifically, one fifth of the total variance can be attributed to between-country variance (table 19). The individual characteristics explain about one fourth of the differences between countries (compositional effect), while the welfare regime type adds a similar contribution to the explanation.

Table 19. *Societal pessimism, multilevel models 0, 1 and 2.*

Societal pessimism	**Variance components**		**ICC**	**–2LL**	**PRV**	
	Country level	**Individual level**			**Country level, %**	**Individual level, %**
Model 0	110.8	447.9	0.20	393196.9	.	.
Model 1	82.7	411.5	0.17	370296.5	25.4	8.1
Model 2	51.3	411.5	0.11	370263.2	53.7	8.1

Model 0: null model, a.k.a variance components model; Model 1: Individual level control variable; Model 2: Model 1 + welfare regime classification.

ICC: intraclass correlation; PRV: Proportional reduction in variance components, compared to null model.

Societal pessimism has a curvilinear relationship with age (again a downward opening parabola) with the peak of gloominess at about 50 years. Additional years of education and an immigration background decrease pessimism, while unemployment, sickness and poverty increase it (table 20). Comparing to the Nordic social experience, living in the Eastern regime adds almost 17 points to the pessimism score; the Continental and Southern families of nations are almost as troubled as the transition family.

Table 20. *Societal pessimism, fixed regression coefficients from model 2.*

	Societal pessimism	
	B	**p**
Intercept	43.002	#
Individual level		
Age	0.306	#
Age squared	−0.003	#
Male (= 1)	−1.578	#
Full time education (yrs)	−0.522	#
Domicile (type III test)	.	0.860
Big city	0.283	0.641
Suburbs, outskirts of big city	0.120	0.849
Town, small city	−0.036	0.950
Country village	0.089	0.879
Farm, home in countryside	ref.	.
Lives with partner (= 1)	−0.574	0.013
Immigrant (= 1)	−2.723	#
Sick (= 1)	5.051	#
Poor (= 1)	6.421	#
Unemployed (= 1)	4.409	#
Lonely (= 1)	1.650	#
Country level		
Welfare regime (type III test)	.	0.002
Anglo-Saxon	3.867	0.536
Continental	13.617	0.003
Eastern	16.687	0.0002
Southern	12.187	0.029
Nordic	ref.	.

# $p < 0.0001$; ref. = reference category.

The socio-political context apparently moderates the impact of an immigration background on societal pessimism (table 21). Typically, immigration seems to diminish societal pessimism. A plausible explanation is that immigrants, when assessing the path society is taking, take as a point of reference their own background, which may involve certain hope-generating processes related to adverse pushing factors, promises of pulling factors and transition from culture shock to successful adaptation (Hillman and Weiss 1999, 83; Ward et al. 2001, 23–24, 40–42). There are differences between the regimes, though. The diminishing effect of an immigration background to societal pessimism is close to zero in the Eastern regime but it is almost positive (i.e. increases pessimism) in the Nordic one. Regarding the Nordic case, we have above made observations in relation to sickness and economic hardship that seem to reveal a pattern: an immigration background seems to be in the Nordic regime an adverse factor with respect to well-being. This brings further evidence to the idea that the boundaries of the Nordic worlds of welfare do not, *de facto*, allow easy access.

5.5 Recognition

As with other components of well-being, we shall also approach recognition from the dark side. Unfairness, disrespectful treatment and misrecognition are the elements that constitute in our study the contents of low recognition. Simply put, what is at stake is the moral quality of inter-personal everyday life. As seen above, vulnerable social positions expose their occupants not only to material and physical ill-being but also to disillusionment. In addition, the morality of every-day life suffers, as we are about to see soon. But before empirical examination, let us illustrate the matter in the light of selected literature.

Using a phenomenological analytical frame, Charlesworth (2005) studied the everyday perceptions of inequality among a disadvantaged working-class group in South Yorkshire. At the centre of analysis that draws heavily on Bourdieu's work is the way the attribution of worth in the social sphere is dependent on income and status. Not being able to signal the possession of necessary resources or a valued standing easily invites attitudes of social phobia, since the social sphere functions as a mirror of personal failures. (Charlesworth 2005, 296, 311.) In an interview, an unemployed man talks about the demoralising effect of the moral quality of everyday life:

"It's just, it's just everybody in it, they look at you like you're muck don't they, like you're dirt on [the] floor. […] I feel depressed, because I haven't got anything have I? I haven't got a job, I'd like a decent job a nice relationship and a nice home […] I feel worthless, I've got myself a worthless, I feel worthless in myself, I just feel worthless." When the interviewer asks what makes him feel worthless, the man answers: "How people treat you in public, no jobs, no money […]". (Charlesworth 2005, 302–303.)

Table 21. *Societal pessimism, fixed regression coefficients from model 1, calculated separately for each regime.*

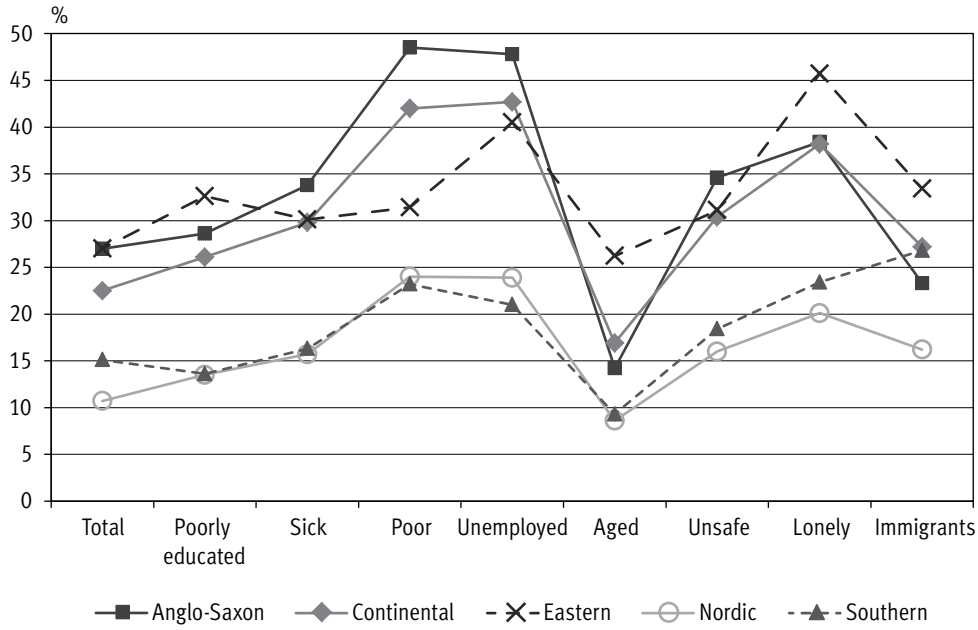
	Anglo-Saxon		Continental		Eastern		Southern		Nordic	
	B	p	B	p	B	p	B	p	B	p
Intercept	54.573	0.083	55.110	#	59.044	#	63.469	0.008	50.350	0.0002
Individual level										
Age	0.185	0.064	0.306	#	0.447	#	0.059	0.538	0.063	0.362
Age squared	−0.001	0.354	−0.002	#	−0.004	#	−0.001	0.379	0.001	0.466
Male (= 1)	−2.609	#	−2.340	#	−0.782	0.030	−1.217	0.037	−2.421	#
Full time education (yrs)	−1.008	#	−0.435	#	−0.577	#	−0.277	#	−0.744	#
Domicile (type III test)	.	0.280	.	0.056	.	0.014	.	0.001	.	0.576
Big city	3.609	0.069	0.477	0.644	−1.968	0.207	−1.599	0.402	−0.292	0.726
Suburbs, outskirts of big city	1.606	0.327	0.132	0.900	−2.177	0.199	1.236	0.559	0.250	0.744
Town, small city	2.146	0.180	1.047	0.285	−2.908	0.060	−3.615	0.053	0.638	0.360
Country village	1.064	0.523	−0.225	0.818	−1.516	0.326	−1.943	0.291	−0.252	0.739
Farm, home in countryside	ref.	.	ref.	.	ref.	.	ref.	.	ref.	.
Lives with partner (= 1)	−1.834	0.018	−0.193	0.648	−0.116	0.778	−1.547	0.030	−1.133	0.031
Immigrant (= 1)	−4.594	#	−3.063	#	−0.686	0.352	−6.946	#	0.510	0.553
Sick (= 1)	5.106	#	4.792	#	5.339	#	4.087	#	3.949	#
Poor (= 1)	8.255	#	7.661	#	5.974	#	4.343	#	5.969	#
Unemployed (= 1)	4.419	0.009	3.707	#	5.246	#	0.925	0.518	6.185	#
Lonely (= 1)	2.517	0.050	1.637	0.014	1.295	0.022	2.214	0.063	0.879	0.311

# $p < 0.0001$; ref. = reference category.

The stress caused by the experiences of misrecognition, faced in vulnerable social positions, may have concrete health effects as well. Societies with large income differences are often characterised by higher relative deprivation and a more hierarchical social structure, which is why suffering from misrecognition is likely to be more severe. On the one hand, the use of tobacco, alcohol and drugs as a means to fight the stress and, on the other, the pure physiological effects of stress itself are the pathways through which misrecognition induces health-damaging effects. (Charlesworth et al. 2004.)

Figure 4 illustrates the distribution of low recognition across vulnerable social positions for each welfare regime. The relationship between low recognition and vulnerable social positions has a roughly similar profile in all welfare regimes. *Poverty, unemployment and loneliness are associated to higher incidence of low recognition, whereas old age seems to be related to respectful treatment*. Differences in the rates of low recognition between vulnerable social positions are somewhat less pronounced in the Nordic regime, known at least historically for its egalitarian welfare culture. In this respect Southern and Eastern regimes resemble the Nordic country group, but both the Anglo-Saxon and Continental regimes are less equal. The Nordic regime differs from the Southern family of nations basically only in terms of immigration: in the latter group of countries, immigration is associated to higher-than-average incidence of low recognition. The Eastern group, on the other hand, differs from the two other flat-profile groups by the overall level, as the rates of people suffering from low recognition are visibly higher in a systematic fashion. The second distinguishing

Figure 4. *Low recognition across vulnerable social positions in different welfare regimes.*



feature of the Eastern regime is the weak relationship of poverty and low recognition, probably explained by the fact, already mentioned above, that economic hardship is a very common phenomenon in these nations.

Living in the liberal welfare regime and being poor or unemployed is the combination that most severely exposes its occupant to demoralising experiences in the social sphere as almost fifty percent of respondents occupying this structural position suffer from low recognition. Perhaps, one may reason, explanation lies in the idea that the dominant currents of the liberal socio-political culture do attribute the causes of poverty and unemployment to the deeds and character of the individual, who feels, thus, stigmatised, disrespected, not recognised and/or unfairly treated (cf. Charlesworth et al. 2004).

Continuing analysis by multivariate techniques reveals that by far the largest portion of variance can be located in the individual level as the intra-class correlation for recognition is only five percent, i.e. the same size as for health (table 22). About one-third of the country level variance consists of compositional differences, while welfare regime classification, added in model 2, adds only some ten percent to the explained variance. Of the four dimensions of well-being elaborated here in more detail, then, health and recognition are more strongly dependent on individual factors, while economic hardship and societal pessimism allow more extensive contextual explanation.

Table 22. *Recognition, multilevel models 0, 1 and 2.*

Recognition	Variance components		ICC	–2LL	PRV	
	Country level	Individual level			Country level, %	Individual level, %
Model 0	14.9	315.1	0.05	375497.7	.	.
Model 1	9.7	282.9	0.03	352918.9	34.5	10.2
Model 2	8.1	282.9	0.03	352899.3	45.7	10.2

Model 0: null model, a.k.a variance components model; Model 1: Individual level control variables; Model 2: Model 1 + welfare regime classification.
ICC: intraclass correlation; PRV: Proportional reduction in variance components, compared to null model.

The interpretation of fixed regression coefficients, portrayed in table 23 (p. 74), suggests that sickness, unemployment, poverty and loneliness predict a diminution in the recognition score. With advancing age also recognition increases.[16] As the between-country differences are small, the welfare regime category does not reach the conventional level of statistical significance. However, coefficients do tell about the same general structure as the figure 4: the Nordic and Southern regimes are to some extent characterised by a higher level of recognition than the other three groups.

16 The relationship is quadratic, but practically almost linear. Graphically it can be portrayed as an upward opening parabola, with the low peak at about 25 years.

Table 23. *Recognition, fixed regression coefficients from model 2.*

	Recognition	
	B	**p**
Intercept	73.122	#
Individual level		
Age	−0.148	#
Age squared	0.003	#
Male (= 1)	−0.630	#
Full time education (yrs)	0.317	#
Domicile (type III test)	.	#
Big city	−2.073	#
Suburbs, outskirts of big city	−2.251	#
Town, small city	−1.909	#
Country village	−0.134	0.782
Farm, home in countryside	ref.	.
Lives with partner (= 1)	1.595	#
Immigrant (= 1)	−0.403	0.185
Sick (= 1)	−3.434	#
Poor (= 1)	−5.865	#
Unemployed (= 1)	−3.816	#
Lonely (= 1)	−6.819	#
Country level		
Welfare regime (type III test)	.	0.097
Anglo-Saxon	−4.477	0.079
Continental	−4.506	0.017
Eastern	−3.563	0.050
Southern	−0.972	0.674
Nordic	ref.	.

# $p < 0.0001$; ref. = reference category.

The regime-specific regression models (table 24) mainly support the findings of figure 4: the negative effect of an immigration background on recognition is most emphasised in the South European welfare regime. Loneliness and unemployment have a prominent negative impact in all regimes, but especially in the group of transition nations. Poverty exposes to an adverse social climate in all regimes, but the association is strongest in the Anglo-Saxon worlds of welfare; the link is weakest in the Nordic case, perhaps pointing towards a different understanding concerning poverty and social justice.

Table 24. *Recognition, fixed regression coefficients from model 1, calculated separately for each regime.*

	Anglo-Saxon		Continental		Eastern		Southern		Nordic	
	B	p	B	p	B	p	B	p	B	p
Intercept	71.228	0.038	66.636	#	67.231	#	72.901	0.001	76.173	#
Individual level										
Age	−0.316	#	−0.004	0.924	−0.273	#	0.086	0.241	−0.150	0.003
Age squared	0.006	#	0.002	0.000	0.004	#	0.001	0.263	0.001	#
Male (= 1)	−0.291	0.573	−0.012	0.966	−1.373	#	0.610	0.171	−0.723	0.025
Full time education (yrs)	0.289	#	0.244	#	0.583	#	0.109	0.033	0.152	0.001
Domicile (type III test)	.	#	.	#		#	.	#	.	0.004
Big city	−2.545	0.105	−2.089	0.013	0.267	0.846	−6.673	#	−1.411	0.020
Suburbs, outskirts of big city	−4.539	0.001	−1.084	0.204	0.561	0.708	−8.066	#	−2.189	#
Town, small city	−3.109	0.014	−1.279	0.108	−0.019	0.989	−5.798	#	−1.385	0.006
Country village	−0.715	0.588	0.216	0.786	1.826	0.179	−3.426	0.013	−1.104	0.045
Farm, home in countryside	ref.	.	ref.	.	ref.	.	ref.	.	ref.	.
Lives with partner (= 1)	1.848	0.003	0.867	0.012	1.951	#	1.603	0.004	0.431	0.260
Immigrant (= 1)	1.738	0.045	0.137	0.781	−1.213	0.066	−2.836	0.001	−0.139	0.825
Sick (= 1)	−4.796	#	−4.206	#	−2.408	#	−1.640	0.013	−3.135	#
Poor (= 1)	−7.823	#	−7.050	#	−4.701	#	−5.589	#	−4.507	#
Unemployed (= 1)	−3.123	#	−3.933	#	−4.208	#	−1.772	0.105	−3.648	#
Lonely (= 1)	−5.579	#	−6.653	#	−7.694	#	−3.800	#	−5.828	#

# $p < 0.0001$; ref. = reference category.

5.6 Conclusions

On the basis of the analyses presented above we can now draw conclusions regarding the main question of this study: to what extent does welfare regime make a difference with regard to well-being and its distribution across the social structure?

It can be maintained, first of all, that the European welfare regimes differ considerably in terms of well-being when we look at the margins. High economic hardship is widespread (45%) in the – admittedly heterogeneous – group of countries here labeled the Eastern European welfare regime. In the Nordic welfare regime it is rare (5%). Poor health is twice as common and inactive social relations are more than twice as common in the Eastern regime as in the Southern one (37% vs. 20% and 36% vs. 15%, respectively). High insecurity is infrequent in the Nordic model (11%) but clearly more common in the Latin rim (28%). Low social contribution is a rule in the transition nations (49%) and an exception at the Northern edge (10%). High societal pessimism almost lacks existence in the Nordic countries (3%), while sombre views are rather frequent in the Eastern group (23%). The Anglo-Saxon group is characterised by a prevalence of weak local ties (35% vs. 22–27% for other regimes). Low recognition is almost three times as common in the Anglo-Saxon and Eastern regimes (27% both) in comparison to the Nordic rate (11%).

The multivariate and multilevel approach brought more light to the matter. Of the four dimensions chosen for a detailed analysis, economic hardship and societal pessimism reveal clear differences between countries: one fourth and one fifth of the variance, respectively, is of the between-countries type. Regarding economic well-being, compositional effects explain one fifth of the between-countries variance, while welfare regime classification adds sixty percent. In the case of societal pessimism, about one-fourth of the between-countries variance is due to compositional effects and a slightly larger share is explained by adding welfare regime classification to the model. Regarding the other two dimensions – sickness and recognition – the variance consists mainly of the individual level type: variation within countries is far greater than variation between countries.

Looking at how occupying vulnerable social positions exposes to ill-being opens yet another view to our main theme. In what follows, five regime-specific summaries of these associations are presented:

The Anglo-Saxon regime. Comparatively speaking, economic hardship is not common in the Anglo-Saxon welfare regime. Of the vulnerable positions unemployment and sickness are most closely tied to economic direness. Sickness is relatively rare as well, age and poverty being the major exposing factors. Societal pessimism is not widespread either and in this regard poverty is the most notable predictor. In contrast, low recognition is rather prevalent in these societies and most of the vulnerable positions are strongly exposed, especially poverty and unemployment.

The Continental regime. Economic hardship is more common in the Continental than in the Anglo-Saxon welfare regime, but it is still relatively rare. Unemployment exposes heavily to economic difficulties and also loneliness has a fairly strong linkage to it. From a comparative perspective, sickness is not a pressing problem; old age and poverty are the most prominent positions of exposure. In a clear distinction from the Anglo-Saxon regime, societal pessimism is very common and almost all vulnerable positions are associated to it, most visibly poverty, unemployment and loneliness. Rates of low recognition are rather high for all vulnerable groups, except for the aged people.

The East-European regime. Economic hardship is extremely typical in the group of transition nations. Unemployment and poor education make it even worse. Sickness is more widespread than elsewhere and the effect of age is very strong. Societal pessimism is very prevailing, especially among the poorly educated and unemployed people. Low recognition is almost of the same proportions as in the Anglo-Saxon and Continental regimes. Loneliness and unemployment are the positions that are most closely associated to misrecognition.

The Nordic regime. Overall, economic hardship is rare in the Nordic country group, but an immigration background and unemployment clearly diminish the level of economic welfare. Sickness is fairly prevalent in all vulnerable groups; poverty is a strong exposing factor and, from the comparative point of view, also an immigration background and unemployment clearly increase the levels of self-reported sickness. Societal pessimism is very rare and unemployment is the most pronounced risk factor. Misrecognition is relatively rare; unemployment, poverty and loneliness are the most severely affected positions.

The Southern regime. Economic hardship is relatively common in the Latin rim, especially among the sick and unemployed people and those with an immigrant background. Poor health is, all in all, rare, but loneliness and poverty are linked to worse health. Societal pessimism is not very common and, exceptionally, unemployment is *not* associated to it. The distribution of misrecognition is rather similar as in the Nordic group; aging has a more positive and an immigration background a more negative relationship to recognition in the Southern regime, though.

6 DISCUSSION

In this study we have tackled the multilevel and multidimensional reality of well-being and social policy by introducing a rather advanced methodological solution that is able to face the challenge – multilevel analysis. The results, summarised above, partly follow expectations, but there were some surprises as well. What is most important is that the results make sense, which indicates a fair degree of construct validity of the whole research process.

However, the results and conclusions of any scientific study are valid only conditionally, which is why limitations and weaknesses deserve special attention. Spelling them out in detail helps both the reader and the researcher realise the extension and precise location of these limits of validity. Data collection, analysis, inference – in both a statistical and a general sense – and theoretical presentation all involve points in which one may legitimately question whether the choices were clearly explicated and argued for. Some of these choices – most of them, hopefully – were made consciously and with good arguments, while others probably escaped careful deliberation. In what follows, we aim to discuss the most important observed limitations.

The choice of grouping countries in clusters generates two notable problems. The first one has to do with the loss of details concerning the differences within a group; the second is related to the explanation as it is not at all certain what the grouping variable finally reveals. Let us take these in order. As countries – or any entities, for that matter – are placed in certain categories, one no longer has a clear idea about the differences between the countries of a given category. The extent to which countries within a welfare cluster really cluster in terms of well-being depends on the dimension; economic hardship seems to be the dimension in regard to which the countries of a particular welfare regime most prominently resemble each other, perhaps with the exception of Finland, Poland, Slovenia and Portugal, all of which seem to be almost outliers within their groups. So, details are lost, but this is exactly the rationale for categorising in the first place. Too many details may prevent from seeing more general patterns. In addition, one has to recall that there is no single *a priori* superior level of analysis: country-level means hide the variation between sub-regions, cities versus rural areas, variation between genders and age groups and so forth. Statistical analyses are unavoidably doomed to partial blindness that emerges from the necessary limitations suggested by the question at hand. Admitting it openly is one of the best solutions.

The second possibly problematic grouping issue is the *catch-all* nature of a welfare regime variable. Levecque et al. (2011, 273) observe correctly that a welfare regime classification captures a lot more than just the socio-political system. As Fridberg and Kangas (2008a, 43) put it, "[t]he regime is a kind of catch-all variable that captures numbers of unobserved factors", such as "income distribution, gender equality [and] women's labour force participation". To this list we could add geographical, economic, religious, cultural and historical characteristics that the countries of welfare regimes do, to varying extent, share (cf. Newton and Montero 2007, 223–229). This can be

seen as a problem, given that one expects analytically sharp distinctions between the different aspects, components or domains of the socio-politico-cultural context in which we live our lives. On the other hand, one of the key ideas of our thesis is that a welfare regime is not isolated from the surrounding or underlying cultural context of ideas, ideals, models and values. It is not independent of political and cultural history either. The socio-political context matters with respect to the different dimensions of well-being – as we have sought to demonstrate – exactly because of this. But as quite a bit of the country level variance still remains unexplained in our models, it is perhaps more fitting to say that welfare regime is a "catch-a-lot" than catch all variable.

Cross-linguistic and cross-cultural comparison is yet another difficult issue that merits discussion in this context. To what extent is it reasonable to embark on a survey-based comparison of different cultural and linguistic sub-populations? To what extent do the differences across countries arise from differences in meanings of the concepts being used? What is the role of translation? There are no easy answers, because these questions involve not only purely technical matters, such as item design and evaluation, validity and reliability checks, organising a careful translation procedure, implementing the lessons of pilot-testing and correcting country-specific measurement errors (Harkness 2007; Saris and Gallhofer 2007), but also deep-lying philosophical problems concerning the way we understand reality, language, interpretation and social research.[17] Fortunately enough, in ESS the quality of the entire survey process, including question design and translation, is taken very seriously (see the compilations Jowell et al. 2007 and Stoop et al. 2010). But the issue of interpretation cannot be avoided, not even when studying a supposedly homogeneous population. Indeed, even the items that are formulated according to all the rules and insights of the "art of asking questions" must still be interpreted (cf. Lehtinen and Ahola 2002, 12–16). Whether to talk about measurement error or a chain of interpretations that reflects the interpretational nature of social reality depends on the methodological paradigm in which one operates. In our view survey is necessarily a hermeneutic enterprise. Measurement error is perhaps too dogmatic, arrogant and thin a concept for understanding what is at stake.

As mentioned above in the method section, unit non-response remains an acute problem of the present study, as no weights are provided in the data to counteract its effects. Intentional or unintentional undercoverage is a relevant worry as well when we are talking about vulnerable social groups: institutional dwellers, illegal immigrants and homeless people are not present in our data. Those vulnerable groups that are included are probably underrepresented.

Cross-sectional design implies certain limitations (cf. Levecque et al. 2011, 273.) Most notably, the possibilities to disentangle the causal web included in the processes of social exclusion, vulnerability, multiple deprivation and ill-being are limited when dealing with a data set that has no real temporal dimension. As an implication, the

17 See the recent collection edited by Jowell et al. 2007 for an extensive elaboration of the technical aspects of the topic.

scientific rhetoric of the present study emphasises the idea of description ("getting an overview", "snapshot picture" etc.) and the discourse of causes has been intentionally downplayed to some extent. What we have here is a complex of theoretically embedded empirical associations. As regards variables that imply an obvious logical or temporal structure – i.e. welfare regime is primary with regard to well-being scores – we can talk about cause-like relationships as well. However, the matter of causes still remains complicated at all levels, from ontology to concrete analysis.

In a multivariate setting the number of observations varies between analyses due to differential item non-response (see also Levecque et al. 2011, 273). Between the null multilevel model and the others, the rates of missingness increase from 6.5 to 10.2 percent (hardship), 1.0 to 5.5 percent (sickness), 4.1 to 8.0 percent (anomie) and 4.9 to 9.5 (recognition), i.e. with about four percentage points in each case. These rates of item non-response are fairly low and this increase was judged relatively harmless. Consequently the filtering procedures were not used to guarantee the exact same number of cases for each corresponding analysis. Nevertheless, item non-response always raises questions: to what extent do rates like these induce bias in results? After all, there is the unfortunate possibility that item non-response is not random (see Laaksonen 2010, 95). This remains an open question.

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Our study was motivated by questions concerning the way welfare policy models structure our everyday lives and, especially, their social aspects. If welfare policy reflects the cultural heritage of prevailing values, ideas and ideals, it should not come as a surprise that being, say, unemployed entails different experiences in different welfare regimes. This is evident when one limits the idea to the sphere of redistribution. Since the redistributional outcome is one of the dividing lines between welfare policy models, it is to be expected that this has palpable effects in everyday life. But as we know, money is not just money and work is not just work. Human beings, the social animals, do not flourish without recognition and respect. Therefore the everyday life of an unemployed person may well have a rather different moral flavour in different welfare regimes depending on how deserving, solidarity and worth are interpreted. Where the discourse, culture or ethos of individual achievement, freedom and responsibility prevails, unemployment may easily be stamped with the stigma of laziness, unworthiness and moral corruption – or maybe not. This is why empirical survey research, with all the difficulties and problems involved, is needed: to see to what extent theoretical conjectures and common sense conclusions are valid.

To incorporate this idea into comparative welfare research was the main theoretical contribution of our study. To see what empirical data tells about it was one of the analytical aims; the other analytical aim was to partially replicate an earlier study with a more recent data set. Putting these together resulted in a fairly comprehensive picture of life in Europe. The concept of social well-being, fortunately included in

the high-quality data set of ESS3, was finally a natural way to approach the question. Recognition, based on the work of Honneth, and societal pessimism, the pedigree of which was traced back to Durkheim, were chosen for primary perspectives to social well-being. So, what was learned?

As we remember, the Eastern, Southern and Anglo-Saxon cultures give more priority to self-interest values than the Continental and Nordic value systems (Schwartz 2007). Traces of this were visible in our empirical analyses of well-being. As we saw in tables 3 and 4, in the Nordic and Continental countries people are more active in terms of social contribution – organisational activities, helping others, attending local activities – which fits neatly with the overall priority these cultures give to other-regarding practices (cf. Norris and Davis 2007). Obviously, an extensive welfare policy model does not simply corrupt or crowd out the individual initiative for voluntary engagement.

All in all, the differences in recognition between countries were fairly small. But do the cultures that give higher priority to self-enhancement expose vulnerable social groups more strongly to the risk of misrecognition – unfair treatment, disrespect and lacking recognition? In the case of the Nordic welfare model, this idea holds: the risk distribution profile is relatively flat, as expected, and poverty is somewhat less stigmatising than in the Anglo-Saxon or the Continental regime. This is consistent with the idea that the Nordic welfare culture is less keen to attribute the causes of poverty to the individual. But in the Continental regime, the other country group characterised by other-regarding orientation, the differences of exposure are almost as pronounced as in the Anglo-Saxon regime. The latter, according to expectations, seems to stigmatise the poor and unemployed individuals with quite a conspicuous emphasis. Contrary to what one might expect on the basis of Schwartz's division, recognition does not depend on the unemployment status in the countries of the Latin rim. This supports the interpretation of Paugam and Russell (2000, 261), according to which unemployment is less stigmatising in Southern Europe where the unemployed form a fairly broad social stratum and where the family and neighbourhood levels of social integration are strong.

What about societal pessimism? Differences across countries were now clearly larger than in the case of recognition, and welfare policy model turned out to be a powerful explaining factor. The Eastern regime was found to exert the most powerful increasing impact on societal pessimism. This can be interpreted against the recent political history. Just some twenty years ago these countries faced an enormous societal change after the series of implosions of the socialist regimes. Now, to apply Durkheim's vocabulary, acute anomie can take place when sudden societal transformations generate poor regulation of behaviour (Deflem 2007). How to define acute and chronic may be debated, but there is some face validity in the idea that we can expect to still see some traces of this whole process – its background, quick collapse and the consequences – in how people assess the trajectories their societies seem to be taking. Sudden liberalisation, taken in some transition nations further than in others, may be part of the explanation that lies behind the high priority given to self-interest values. Where

the ethos of individual attainment is highly valued but the means of success are, as it were, distributed very unequally, we may see instances of the Mertonian anomie. This was, in fact, Merton's own example. The valorised goals of success are not *de facto* realistic goals for everyone even though the cultural understanding of individual merit would so imply.

Epilogue/update

The ESS3 data dates four to five years back from the time this study was undertaken. Not a long time, it may seem at first sight. However, the economic context of European welfare policy has taken dramatic turns since the time of ESS3 data collection that took place, as we remember, in 2006 and 2007. This is why a short epilogue is necessary. The Lisbon strategy for 2000–2010 had emphasised strong social policy as a resource for economic development, at least in symbolic and rhetorical terms. (Pakaslahti 2011.) However, the expert report commissioned to evaluate the realisation of the strategy, published in 2004, painted the issue already in different colours and depicted social policy mainly as an expense for the economy (Kok 2004; see Pakaslahti 2011, 111–116). But even though the rhetorical emphasis on the social dimension was vanishing already before the time the data of ESS3 were collected, the Europe of this study is still very different from the one of 2011. The financial and economic crises, starting from September 2008, have led to mounting pressures to resort to social devaluation, as the traditional emergency tool of devaluing the national currency is no longer viable. Since the dominant political discourse considers the allegedly too extensive – i.e. too expensive – social policy as one of scapegoats of the critical situations, the European worlds of welfare policy have faced a time of acutely pronounced austerity. The negative face of integration is once more at the upper hand, maybe more strongly than ever. This time welfare cuts may be legitimated with the "blame the EU, not us" strategy – blame avoidance can be a useful defense against the electoral consequences of the typically unpopular cuts. The vulnerable social strata are likely to take the heaviest hit. (Pierson 1996, 173–179; Pakaslahti 2011, 160–164, 175.) Societal pessimism is likely to aggravate. It is hard to be hopeful when jobs are lost due to reasons that have nothing to do with the characteristics, choices and decisions of the individuals in question. On the other hand, the evidently structural reasons of unemployment may soften the stigmatising impact. How the different welfare regimes are able to protect their vulnerable groups is put to a stress test. ESS will administer a rerun of the well-being module in the near future. It would be interesting to repeat the above analyses with an up-to-date data set to see the results of this test.

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