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Welfare state effects on social capital and informal solidarity in the European Union: evidence from the 1999/2000 European Values Study

Wim van Oorschot, Wil Arts and Loek Halman

English

This article tests whether state-organised solidarity substitutes social capital and informal solidarity, based on recent data from the European Values Study. At country level, we find that welfare spending has a reinforcing effect on social capital and a negative substitution effect on informal solidarity. At the individual level, there is also evidence for a substitution effect, since informal solidarity is lower among people who live in countries that spend more on social protection. In addition, there is evidence of a 'national burden' effect, since informal solidarity is lower among people who live in countries with an older population, with higher unemployment, and with a higher percentage of immigrants.

Français

Basé sur des données récentes provenant d'une Étude des valeurs européennes, cet article vérifie si la solidarité organisée par l'état remplace le capital social et la solidarité non officielle. Au niveau national, nous constatons que les dépenses sociales ont un effet de renforcement sur le capital social et un effet de substitution négatif sur la solidarité non officielle. Au niveau individuel, il y a aussi des preuves d'un effet de substitution, étant donné que la solidarité non officielle est plus basse parmi les personnes qui vivent dans les pays qui dépensent plus, au niveau de la protection sociale. De plus, il existe aussi des preuves d'un effet de 'fardeau national', étant donné que la solidarité non officielle est plus basse parmi les personnes qui vivent dans les pays à population plus âgée et où le taux de chômage et le pourcentage d'immigrés sont élevés.

Español

Este artículo pone en prueba si la solidaridad de los estados organizados substituyen el capital social y la solidaridad informal, basándose en los datos recientes del Estudio de Valores Europeos. A nivel de un país, encontramos que los gastos en la asistencia social tienen un efecto reforzado en el capital social y un efecto negativo de substitución en cuanto a la solidaridad informal. A nivel individual, también hay evidencia de un efecto de substitución, ya que la solidaridad informal es menor entre la gente que vive en países donde se gasta más en la protección social. Además, hay evidencia del efecto de una 'carga nacional', ya que la solidaridad informal es menor entre la gente que vive en países donde la población es mayor, con mayor número de desempleados y con un mayor porcentaje de inmigrantes.

Key words: welfare state • social capital • solidarity • values

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Introduction

According to some, in contemporary Western Europe social capital and informal solidarity have declined as a result of the rise of the welfare state. According to others, social capital and informal solidarity are still in good condition because of the welfare state. From the literature it seems that the dispute between welfare state pessimists and optimists produces more heat than light. Both sides have an inclination to claim the moral high ground and to preach to the converted. But can these positions be empirically tested? We intend to do this by reviewing the debate on the unintended moral consequences of the welfare state, formulating informative hypotheses both at country and individual level, and empirically testing them by analysing data from the 1999/2000 European Values Study survey. Finally, we will discuss whether the relation between welfare statism, social capital and informal solidarity is as simple as both sides in the dispute assume.

The debate on the unintended moral consequences of the welfare state

One way to proceed in order to gain insight into the empirical validity of the arguments of the warring parties in the welfare state debate is to hear first the plaintiffs and then the defendants. Boje (1996) argued that in the heyday of European welfare states during the 1960s and 1970s civil society was gradually shut out of welfare provision because of strong and comprehensive welfare state intervention. Welfare state institutions took over the obligations of support previously located in civil society and family networks. Wolfe (1989) argued that comprehensive welfare states squeezed families, communities and social networks. He claims that an historical irony may exist: when social obligations become public, intimate and distant ties will weaken, thus undermining the very moral strength the welfare state has shown earlier on. Zijderveld (1983, 1998) argued that welfare state development has hollowed out and eroded intermediate social structures. As a result, he claims, commitment and trust declined, and, like Spieker (1986), he contends that the original welfare state ethic made way for an immoralistic ethos of consumerism, selfishness and even hedonism. Fukuyama (2000) advanced a similar thesis, arguing that states can have a serious negative impact on the social capital of their population when they start to undertake activities that are better left to the private sector or to civil society. The ability to cooperate is, in his opinion, based on habit and practice. If the state gets into the business of organising everything, people will become dependent on it and lose their spontaneous ability to work with one another. According to De Swaan (1988), the modern welfare state has eroded interpersonal feelings of solidarity, and has replaced individual responsibility with state responsibility. Finally, Schuyt (1995) also acknowledges that the developed welfare state has severe unintended social and moral consequences, such as the withering away of care obligations for family members and friends, a growing misuse of welfare state benefits and services, and the genesis of a so-called 'immoralistic' welfare ethic, in which hedonism and selfishness dominate.

In contrast, others see the welfare state as enhancing civil society. Kuhnle and

Alestalo (2000) argue that in Scandinavia a positive relationship exists between welfare state development and third sector welfare provision, particularly where welfare states allocate responsibilities and resources to organisations in civil society. Kuhnle and Selle (1990) noted that in Scandinavia voluntary associations often encouraged greater state involvement and happily accepted playing a structural role in the overall set-up of the national welfare state. Rothstein (2001) found that the Swedish welfare state has not eroded people's activities in civil society and voluntary organisations. On the contrary, such activities had grown slightly in the course of the past few decades.

Others have shown that (higher) unemployment benefits do not corrupt the work ethic (Jehoel-Gijsbers et al, 1995; Bryson, 1997; Gallie and Alm, 2000), nor do they discourage unemployed people to look for a job and to accept one if offered (Atkinson, 1989; Barr, 1992). Social expenditures targeted at elderly people do not undermine intra-family and intergenerational solidaristic feelings and behaviour (Kohli, 1999; Attias-Donfut and Arber, 2000; Knijn, 2002). And, in a well-developed welfare state such as the Netherlands, repeated surveys show that from 1960 onwards no consumeristic ethic has developed (Ester and Halman, 1994), nor have citizens become more 'calculating' and selfish, nor have pro-social attitudes, trust in other people and supportive behaviour in families and neighborhoods declined (Dekker and De Hart, 2000).

A few conclusions can be drawn. First, pessimists assume that welfare state provision substitutes civil society institutions, informal networks and informal solidarity. In one interpretation this is the result of a more or less mechanical crowding-out mechanism, where informal relations and solidarity are made superfluous by formal arrangements, and therefore dwindle away. In a stronger interpretation, which is one of moral corruption, welfare results in citizens losing feelings of mutual responsibility and solidarity, and becoming selfish, hedonistic, and uncaring instead. Contrary to this substitution hypothesis, optimists are advocates of a reinforcement thesis, which assumes that welfare has advantageous moral effects. We will look for evidence for both theses. In case we find substitution effects we will see whether these can be interpreted as the result of either crowding out, or moral corruption.

Second, since optimists, as well as pessimists, fail to particularise the effects of welfare according to welfare state regime type or level of social spending, they both seem to assume that there exists something like 'the' welfare state, which would have similar effects in all modern societies. Modern theories on welfare state formation and change, however, clearly point to qualitative different welfare regime types, as well as quantitative different social spending levels (see for example Esping-Andersen, 1990; Castles, 2002). In our analysis we will look into the effects of both indicators of welfare-stateness.

Third, not all authors mentioned are explicit about the relation between social capital and informal solidarity. However, those who assume that social capital influences informal solidarity, rather than the other way round. We will heed their call and test whether the amount of social capital, which usually resides in intermediate social structures of civil society, affects people's feelings of informal solidarity.

Fourth, the theories focus on macro-micro relations, that is, they are about the effects of the welfare state on the relations, beliefs and behaviour of individuals.

Characteristics of the welfare state are, however, only one set of determining factors. We are interested in the relative importance of welfare factors and will, therefore, analyse their effects in conjunction with those of other country characteristics and a number of personal characteristics. We will also study macro–macro relations, that is, the relation between welfare state and other country characteristics.

Hypotheses

Country level

With regard to welfare effort, or social spending, our hypotheses are straightforward. The substitution hypothesis predicts a negative relationship between degree of social spending on the one hand, and social capital and informal solidarity on the other. The reinforcement hypothesis predicts positive relations. In both cases a positive influence of social capital on informal solidarity is expected.

As for regime type, we base our hypothesis on a review of alternative typologies by Arts and Gelissen (2002), who concluded that real types can be merged in six ‘new-cum-old’ ideal types. Of these six ideal types, four are present among the member states of the European Union: liberal or Anglo-Saxon welfare states, conservative–corporatist or Continental welfare states, social democratic or Scandinavian welfare states, and budding or Southern European welfare states. The substitution hypothesis predicts that where state-organised and enforced formal solidarity will be strongest, as in the Scandinavian, social democratic welfare states, social capital will be relatively low and informal solidarity relatively weak. In the Anglo-Saxon liberal and Southern European budding welfare states, organised solidarity is weakest and therefore social capital will be relatively high and informal solidarity relatively strong. The Continental conservative–corporatist welfare states will take up a position in the middle. The reinforcement hypothesis leads to predictions in the opposite direction. Again, in both cases a positive influence of social capital on informal solidarity is expected.

Individual level

With regard to the individual level analyses, we have opted for leaving out here welfare regime type as a dependent variable, and to focus on welfare effort. The reasons for this are that space is limited, and that the country-level analysis will lead us to the conclusion that welfare effort is a much better predictor of informal solidarity than regime type. At the individual level, the substitution hypothesis predicts that people living in higher-spending welfare states will show a lower degree of informal solidarity, compared to those living in countries where social spending is lower. The reinforcement hypothesis predicts the opposite. Furthermore, we assume that people with a higher level of social capital will have a higher degree of informal solidarity.

Since we are interested in the relative effects of welfare spending, we will incorporate an additional set of country and personal characteristics in our analyses.

There is no explicit and detailed theory about such other factors that determine people's degree of informal solidarity in a welfare state context, but there is wide consensus that generally two types of factors play a role (in combination): those related to people's interests, and those that relate to people's values, norms and ideologies. This consensus is apparent in theoretical work on pro-social behaviour, altruism and welfare support (Elster, 1990; Lindenberg, 1990; Mansbridge, 1990; Therborn, 1991; Taylor-Gooby, 1998; Chong et al, 2001; Kangas, 2003), and based on the results of empirical studies on attitudes and opinions regarding equality, solidarity and social justice in a welfare state context (Hasenfeld and Rafferty, 1989; Groskind, 1994; Pettersen, 2001; van Oorschot, 2002; Blekesaune and Quadagno, 2003; Rodger, 2003). Our data set enables us to retrieve a number of structural and cultural variables, indicating interests and values, which could contribute to determining people's informal solidarity: gender, age, income, whether or not one is unemployed, educational level, religiosity, political stance and degree of ethnocentrism.

As for gender, it might be expected that women show higher informal solidarity than men since there is empirical evidence that women are more motivated than men to support state welfare (Deitch, 1988; van Oorschot, 2002). Explanations for this might be found in cultural differences, in the sense that women adhere more to values of caring and of mutual responsibility (Deitch, 1988), and that they tend to agree more with need as a principle for redistributive justice, compared with men who prefer merit and reciprocity (Arts and Gelissen, 2001). But it might also be for reasons of self-interest, since usually women benefit more from state welfare (Hernes, 1987; Erie and Rein, 1988).

With regard to age, it can be expected that younger people will express feelings of informal solidarity less than older people. From the perspective of self-interest, one could argue that they identify less with welfare recipients since they run lower social risks (for example of sickness and disability), old age is further away, they will have fewer direct responsibilities towards spouses and dependants, and have less invested in welfare protection (see also Svallfors, 1989). There might also be cultural differences, based on the fact that younger people, on average, are less materialistic in Inglehart's terms (van Deth, 1984), which would make them less supportive of welfare and less solidaristic towards needy people (Pettersen, 1995; van Oorschot, 2002).

With regard to income level, expectations are rather straightforward. Since people with higher incomes generally are less supportive of welfare (Pettersen, 2001; Taylor-Gooby, 2001), one could expect them to be less solidaristic towards others who would need such support. Another straightforward expectation is that people who are unemployed will feel more solidaristic towards people who need welfare protection, since most of them will depend on a welfare scheme themselves.

With regard to educational level, expectations are contradictory. On the one hand, one could assume that people with a higher educational level would be less solidaristic, since generally they would depend on welfare less, than people with a lower educational level. They will have lower risks of sickness, disability and unemployment, and on average they will have higher incomes. However, educational level not only indicates economic risks and capital, but also cultural capital. As a result of their longer and higher level education, more highly educated people are

believed to have a stronger constructivist view on society, which makes them less authoritarian and more tolerant towards social differences (Gabannesch 1972 in Houtman, 1996). Others claim in a similar way that more highly educated people have a higher degree of 'moral enlightenment' (Ganzenboom, 1988) and are culturally more progressive and open-minded. It has been shown that on such grounds people with a higher level of education are stronger supporters of equality and social rights (Hasenfeld and Rafferty, 1989), as well as of state welfare (van Oorschot, 2002), and have a clearer eye for the structural causes of neediness (Wilson, 1996). This leads us to expect that higher cultural capital correlates with higher informal solidarity towards needy others.

With regard to religiosity, it might be expected that religious people are more solidaristic towards needy people, since they will adhere to the Christian moral of compassion. Empirically, it has been found that religious people donate more to charities than non-religious people (Hoge and Yang, 1994), and on average they show more pro-social behaviour (Wuthnow, 1991). There is a discussion about whether denominations within the Christian religion differ in these respects, notably whether Catholics and Protestants differ, but more crucial than this seems to be the power of peer group pressure, which depends strongly on the frequency of church attendance, irrespective of denomination (Regnerus et al, 1998).

As for political stance, it might be expected that leftist people feel more strongly solidaristic than rightist people, since there is ample empirical evidence that leftist people have more positive attitudes towards equality, social rights, welfare support and so on (Coughlin, 1980; Whiteley, 1981; Taylor-Gooby, 1983; Papadakis and Bean, 1993; Pettersen, 1995; van Oorschot, 2000). This may be based on ideological grounds, to the degree that social democratic and conservative/liberal values are reflected in people's welfare attitudes, but also on self-interest considerations since, on average, people with lower incomes and lower status jobs, who may expect to depend on welfare more strongly, tend to be more leftist.

Finally, ethnocentrism may increasingly play a role in European people's feelings of welfare solidarity due to the expansion of the multicultural character of European societies that results from the growing inflow of migrants. It can be expected that people who are more strongly ethnocentric are less solidaristic if the group in need regards immigrants.

As for the country characteristics, our main interest is in analysing whether there is evidence for either the substitution or the reinforcement hypothesis regarding the influence of a country's degree of welfare spending on the degree of informal solidarity among its citizens.

In addition, we are interested in the influence of a number of other country characteristics. There is no theoretical or empirical information that could guide our hypotheses here, which means that our analyses will be mainly exploratory, and our hypothesis will be based mostly on common sense. First, a country's overall degree of social capital might have a negative, substitution effect on people's informal solidarity in case a high level of social capital in a society conveys a general message, and creates a general feeling, that needy groups in society are well taken care of by the work of active citizens in institutions, organisations, clubs and networks in civil society. Such a feeling could lead to less personal concern about needy groups. However, it might also have a positive, reinforcing effect in case a high social

capital context has a socialising effect on citizens, that is, when it basically conveys norms of fellow feeling and social responsibility.

Second, analogous to our individual-level analysis, we are interested in the effects of variables indicating interests and cultural norms. Interest-related variables at country level could refer to perceptions of national burden, for instance, when the sheer size of the groups that are the object of informal solidarity (like elderly people, sick and disabled, unemployed, immigrants) gives people uneasy feelings about the costs that are or could be involved for meeting their needs. We will therefore analyse the effects that the average age of a country's population, its unemployment rate and its percentage of immigrants have on informal solidarity.

As for cultural variables, we will analyse the effects of the average degree of ethnocentrism in a country, the average political stance of its population on a left-right scale, and the average educational level of its citizens. We expect that informal solidarity will be lower among populations that are more ethnocentric, more rightist and lower educated.

To single out the cultural capital component of educational level from its economic capital component, we will control for a country's economic wealth, by including mean income. The effect of mean income could be a higher degree of informal solidarity, because in richer countries people might perceive greater financial possibilities for helping needy groups, while the informal solidarity of people in poorer countries might be strained by their perception of insufficient resources.

Data and measurements

Data

The data are from the 1999/2000 wave of the European Values Study survey (EVS). Our analyses are confined to the EU member states (Luxemburg excluded because of its small size and great wealth). We are not able to expand our analysis and compare results with other non-European welfare states, since the two main international surveys, the World Value Surveys and the International Social Survey Program, unfortunately do not contain adequate and comparable measures of social capital and informal solidarity. We are also aware that a more informative test of the competing hypotheses would sooner require longitudinal than cross-sectional analyses, but unfortunately adequate measures of social capital and informal solidarity are not available within the earlier waves (1981 and 1990) of EVS (see www.europeanvalues.nl).

Measurements

In a welfare state context informal solidarity refers to people's feelings about and concerns with the basic target groups of welfare policies, that is, the socio-economically weaker and (potentially) neediest social groups (van Oorschot, 2000; van Oorschot et al, 2001). In the 1999/2000 EVS participants were asked to tell,

on a five-point scale, to what extent they were concerned about the living conditions of four welfare target groups in their country: the elderly, the unemployed, immigrants and the sick and disabled. Answers regarding all four groups correlate positively, but especially strongly regarding the elderly and the sick and disabled (Pearson $r = 0.67$). For this reason we have taken the latter two groups together to form one group of the 'unable', next to the 'unemployed' and the 'immigrants'.

Our measure of welfare state regime is based on the typology discussion by Arts and Gelissen (2002). The United Kingdom and Ireland will be treated as Anglo-Saxon liberal welfare states, France, Germany, Austria, Belgium and the Netherlands will be grouped as Continental conservative welfare states, Denmark, Sweden and Finland will be labelled as Scandinavian social democratic welfare states, and Greece, Portugal, Spain, and Italy will be called Southern European budding welfare states¹.

Welfare effort is measured per country by the average of its public social expenditures as part of GDP over the period 1990–98 based on Eurostat Yearbook 2002 figures.

Social capital is a concept for which the literature mentions a wide variety of definitions and measurements. For our purposes, however, there is a satisfactory measurement model available that contains different indicators. This model has been developed by Paxton (1999) to map the development of social capital in the USA by using data from the General Social Surveys. Janssen (2000) has adjusted this model in such a way that it can be used to analyse EVS data. The three main components are trust in other people, trust in institutions and participation in civil society. For trust in other people, EVS has only one indicator. People were asked to tell on a two-point scale whether they would, generally speaking, say that most people can be trusted or that you cannot be too careful in dealing with people. Trust in institutions will be measured by using four indicators. People were asked how much confidence they had in a number of institutions (four-point scale). The institutions we will include in our analyses are parliament, civil service, the social security system and the healthcare system. Participation in society is measured by three indicators:

- (1) Belonging to and doing unpaid work for voluntary organisations. Janssen (2000) constructed a three-point scale using an extensive list of 14 voluntary organisations.
- (2) Time spent with friends (four-point scale).
- (3) Time spent with people in clubs or voluntary organisations (four-point scale).

The social capital variable used consists of factor scores resulting from factoring the three components.

As for personal characteristics: gender is a dummy variable with 0=male and 1=female; age is recoded from year of birth; level of education is measured by age when education completed; household income is measured by a self-rating in the deciles categories of a net household income scale; unemployment is measured by the question of whether people were unemployed or not; political stance is measured through self-placement on a 10-point left-right scale; religiosity is measured as denomination (whether or not people regard themselves as Catholics) and as frequency of church attendance (per week, month, year or even longer);

ethnocentrism is measured as the degree to which respondents do not accept other ethnic groups (immigrants, Muslims, Jews and gypsies) as their neighbours.

Country variables consist of the following composition variables at country level (all based on respondents' reports): the average age; the average household income; the average level of education; the average on the left–right scale; the average level of social capital. To this are added a country's expenditures on old age cash benefits, sickness benefits, and disability benefits as percentages of GDP (averages over 1990–98: from OECD Social Expenditure Database 2001) for the analysis of the informal solidarity with 'unable people' (the elderly, sick and disabled); expenditure on unemployment benefits (average over 1990–98) and the 1998 unemployment rate for the analysis of solidarity with the unemployed; the percentage of immigrants in a country (based on Eurostat 2000, European Social Statistics) and a country's average score on reported ethnocentrism for the analysis of solidarity with immigrants.

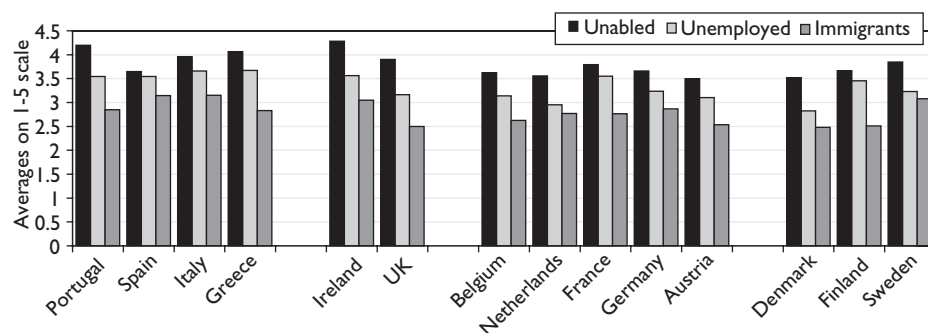
Analysis and results

Aggregate-level analysis

Figure 1 displays the countries' mean scores on informal solidarity with the three groups of unable people, unemployed people and immigrants. The countries are grouped according to type of welfare state.

The general pattern is that solidarity with the 'unable' is highest in all European countries, followed by solidarity with the 'unemployed', which in turn is higher than people's solidarity with the 'immigrants'. This rank order does not come as a surprise, since it is fully in line with earlier research findings on popular perceptions of the deservingness of different needy groups and reflects such criteria as 'control'

Figure 1: Country means on informal solidarity towards the unable, the unemployed and immigrants



Notes:

Unable: $\eta^2 = 0.270$; $F = 83.049$; $p = 0.000$

Unemployed: $\eta^2 = 0.264$; $F = 79.333$; $p = 0.000$

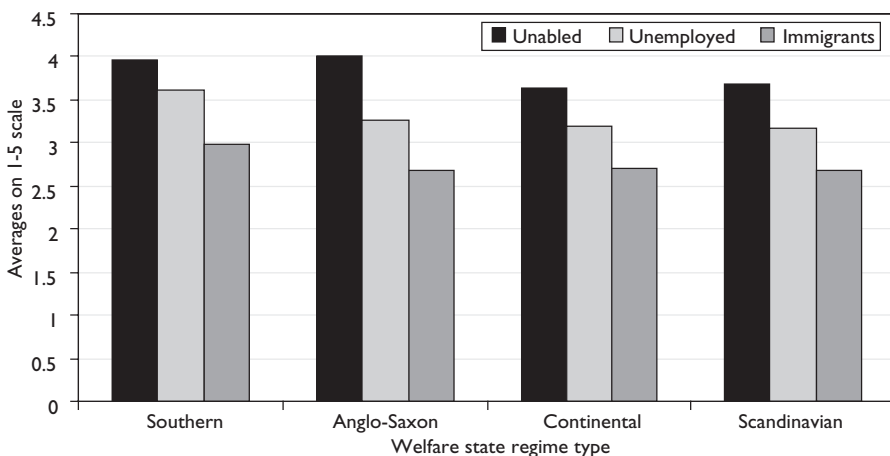
Immigrants: $\eta^2 = 0.229$; $F = 58.465$; $p = 0.000$

(the degree to which people feel that needy persons can be blamed for their neediness), 'reciprocity' (whether people have earned support on the basis of (former) contribution to society) and 'identity' (the degree to which people think of a group of needy people as belonging to the in-group of 'us') (Cook, 1979; Coughlin, 1979; van Oorschot, 2000; Appelbaum, 2001; Kangas, 2003).

Figure 2 contains some information on the validity of the substitution and the reinforcement hypotheses. Figure 2 shows little evidence in favour of either. There is some slight support for the substitution hypothesis as far as informal solidarity towards the unabled is concerned, but not concerning the unemployed and the immigrants. Strikingly, the differences between welfare state regimes are very small. Additional analysis showed even that sum-of-squares variance within the regime types is larger than it is between the four types, which effectively means that welfare state type is not an adequate variable to explain differences in informal solidarity at the country level. This was corroborated by an additional cluster analysis on the three scales of informal solidarity, which revealed that the individual countries do not cluster according to the four welfare state types.

As for welfare state effort, measured by the total of a country's social expenditure as a percentage of GDP, Table 1 shows a negative correlation with levels of informal solidarity. This relation is statistically significant in case of solidarity with the groups of unabled and unemployed people, but it is hardly so concerning the group of immigrants. Since there are clear differences in solidarity with immigrants between countries (as is shown in Figure 1), other factors than welfare statism probably play a role. Because there are only 14 countries in our analysis it is not possible to analyse the relative effect of a number of likely candidates, such as the percentage of immigrants among the population of a country, the degree of ethnocentrism in the population at large, the average level of education, etc. The basic message from

Figure 2: Means on informal solidarity towards the unabled, the unemployed and immigrants by welfare regime type



Notes:

Unabled: $\eta^2 = 0.723$; $F = 4.022$; $p = 0.037$

Immigrants: $\eta^2 = 0.550$; $F = 1.591$; $p = 0.247$

Unemployed: $\eta^2 = 0.678$; $F = 3.126$; $p = 0.070$

Table 1: Correlations (Pearson) between welfare state effort and informal solidarity with unabled, unemployed and immigrants

Welfare state effort	Unabled	Unemployed	Immigrants
Total expenditure on social protection as % of GDP, average 1990–98	–0.59	–0.60	–0.32
$p =$	0.010	0.009	0.122
$N =$	14	14	14

Table 1 is that it corroborates the substitution hypothesis: countries that spend a higher percentage of their wealth on social programmes show lower overall degrees of informal solidarity with needy groups such as the unabled (elderly, sick and disabled people) and the unemployed. Whether this is the result of moral corruption or of crowding out may be difficult to say on the basis of our data. However, it seems that the underlying mechanism might be more a matter of crowding out, because the correlation between welfare effort and informal solidarity towards immigrants is hardly statistically significant, while the correlations in case of solidarity towards the unabled and the unemployed are. Moral corruption would expectedly lead to a loss of solidaristic feelings towards all kinds of others, and maybe notably towards immigrants, while crowding out would particularly lead to less informal solidarity with those groups to which the welfare state targets most of its money.

Figure 3 shows that aggregate social capital varies between European welfare states. There is a North–South divide, which consists of a distinction between the high-level social capital Scandinavian welfare states, and the low-level social capital Southern welfare states. However, there is no significant difference between the middle-level social capital welfare countries representing the Anglo-Saxon and Continental regime types. The question that arises from this is whether the differences between regime types would maybe find their source in differences in sheer extent of welfare effort, regardless of how social provisions are actually designed and institutionalised. It seems that there is more truth in the latter than in the former, since we found that the Pearson correlation between social capital and welfare state effort in terms of a country's social expenditure as a percentage of GDP is very high ($r = 0.81$) and significant ($p = 0.000$). This relation is pictured in Figure 3.

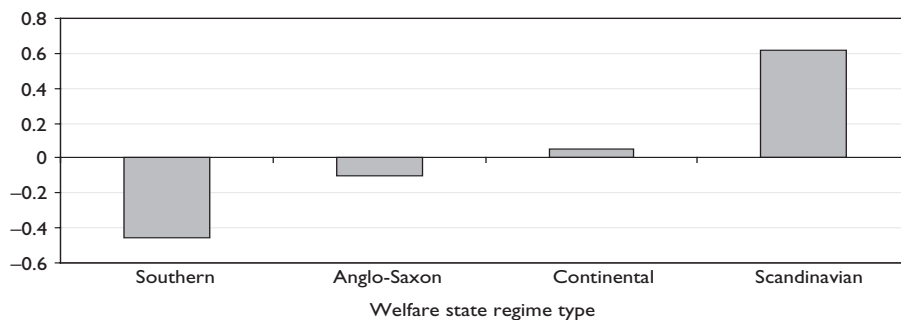
Figure 3: Mean level of social capital, by welfare state type

Table 2: (Partial) correlations (Pearson) of social capital with informal solidarity (country level)

	Unabled	Unemployed	Immigrants
Social capital	-0.488**	-0.647***	-0.162
Social capital with 'welfare effort' constant	-0.032	-0.345	0.174

Notes: * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$

As for the correlation between the average level of social capital among a country's population and its average degree of solidarity with immigrants, Table 2 shows at first sight that it is negative. However, holding constant for welfare state effort, the effects disappear. This implies that the simple correlations are spurious, that is, the result of the fact that welfare state effort has a positive effect upon a country's social capital (as we have just seen) and a negative effect upon its average solidarity towards the unabled and the unemployed (as we have also seen above).

Individual-level analyses

In Table 3 some results of the individual-level multivariate analyses are reproduced. Some personal characteristics have a consistent effect on people's informal solidarity towards all three groups of needy people. First, as expected, informal solidarity is (slightly) higher among women than among men. Second, older people as a rule tend to have stronger solidaristic feelings towards needy people than younger people do. This was expected too, and may have structural and cultural reasons. In both cases, it is not certain whether the age effect is a matter of life-cycle, or of birth cohort. A life-cycle effect would be when people become more solidaristic as they get older, for instance because their personal dependency increases, or older age brings the future risk of personal neediness more closely to mind. It is also possible that the age effect observed actually is a cohort effect, which would mean that the correlation between age and informal solidarity would change once the present birth cohorts grow older. However, this would imply that all the cohorts in all of the 14 countries in our analysis would have experienced highly similar events during their life courses. This might be too strong an assumption, which would favour the idea that the age effect found is a genuine life-cycle effect (growing older). Regrettably, on the basis of our cross-sectional data it is not possible definitely to test the specific character of the age effect.

Third, as expected, informal solidarity is related to political preference. Left-wing people have higher degrees of informal solidarity than right-wing people. It was discussed that people on the political Left are usually more supportive towards welfare issues and arrangements, and here they are also shown to be more solidaristic towards needy groups. Obviously, the Left's orientation towards social equality and social responsibility versus the Right's focus on individual interest and responsibility is to a certain degree mirrored in people's degree of solidarity. Fourth, religion has an influence. People who attend church frequently have a stronger solidaristic attitude towards needy groups. This relation is independent from being Catholic,

Table 3: Multivariate regressions of individual- and country-level characteristics on informal solidarity

	Unabled Beta	Unemployed Beta	Immigrants Beta
<i>Individual characteristics</i>			
Gender (male/female)	0.050	0.023	0.043
Age	0.136	0.134	0.053
Income	–	–	–
Educational level	–	–	0.063
Catholic	–	–	–
Church attendance	0.084	0.071	0.084
Political preference	–0.037	–0.114	–0.154
Social capital	0.054	0.081	0.135
Unemployed	x	0.064	x
Ethnocentrism	x	x	–0.166
<i>Country characteristics</i>			
Old age benefit expenditure	–0.121	x	x
Disability benefit expenditure	–0.077	x	x
Sickness benefit expenditure	–	x	x
Unemployment benefit expenditure	x	0.126	x
Unemployment rate 1998	x	–0.144	x
Percentage immigrants	x	x	–0.035
Mean ethnocentrism	x	x	–0.086
Welfare effort as % GDP	–	–0.245	–0.196
Mean age	–0.070	–0.096	–
Mean income	0.087	–0.168	–0.046
Mean educational level	0.118	0.268	0.115
Mean political stand	0.085	–	–
Mean social capital	–0.421	–0.313	–
R2	0.112	0.127	0.119
R2 change vs individual level model	0.056	0.057	0.092

*Notes:*Coefficients shown are significant at $p < 0.01$

x = variables not included in specific regression analysis

which means that it is also present among other denominations in our data set (mostly Protestants, since there are very low percentages of Eastern or Greek Orthodox, Jews, Muslims, Hindus, etc). It is also independent of age, which is significant since usually church attendance is higher among the older age cohorts. As expected, then, it might be that religious moral convictions of compassion, influenced by attending mass or service regularly, are a basis for higher informal solidarity. Finally, with regard to personal characteristics, informal solidarity towards all three groups of needy people is higher among people who have a higher level of social capital – that is, among those who have more trust in other people and in institutions, and who participate more actively in informal social networks and

voluntary organisations. As often assumed, this kind of pro-social attitude and behaviour tends to go hand in hand with stronger feelings of solidarity with needy groups, irrespective of the character of the group.

Some of the personal characteristics relate to specific informal solidarities. Not surprisingly, we find that unemployed people have a higher degree of concern towards the group of unemployed people, and people who are more ethnocentric are less solidaristic towards immigrants. Furthermore, and interestingly, educational level does not affect solidarity towards the unabled and the unemployed, but it does have a positive effect on solidarity towards immigrants. This particular pattern may be understood if one recognises that people with a higher educational level on average have more cultural capital. This means that they are more open-minded and have greater tolerance towards other people who are different, which are both factors that contribute to greater solidarity towards immigrants. It is also interesting that income has no effect on informal solidarity. It is sometimes found in opinion surveys that higher income people are less supportive of welfare state arrangements, probably because they perceive welfare as less in their personal interest (Pettersen, 2001; Taylor-Gooby, 2001). In any case, our findings suggest that a possible anti-welfare sentiment among people on higher incomes has nothing to do with their level of informal solidarity towards needy groups.

Table 3 shows that country characteristics add significantly to the explanation of informal solidarity. This means that people's solidarity with needy others is not only a matter of personal values, beliefs and interests, but that it is also shaped by the wider cultural and structural setting they live in (see also Blekesaune and Quadagno, 2003). Informal solidarity towards needy groups does not only differ between individuals, but also between national populations. Given the fact that informal solidarity with immigrants is lowest generally (Figure 1), it is interesting to note that the relative impact of country variables is lowest too in the case of immigrants. Clearly, informal solidarity towards immigrants is the least socially standardised of all three forms, which might be related to the fact that this group is a relative newcomer among the potentially vulnerable groups that inhabit European welfare states.

Among the set of country variables, only a population's average educational level has a consistent influence on informal solidarity: the higher this level is, the more individual citizens are solidaristic towards needy groups. If the basic mechanism is that education conveys a broader solidarity with generalised others than living in a context in which such solidarity is more prominently present (eg as exposed through the media), all people will be influenced by it.

All other country variables differ in their influence on informal solidarity, either by degree or direction of their influence. However, there are patterns.

First, and foremost, there is clear evidence for the substitution hypothesis. This hypothesis most generally says that feelings of informal solidarity will be lower if people live in a social context in which there is more formally organised solidarity, that is, where needs of groups that are the object of solidarity are more and better cared for by formal institutions and organisations in society. The evidence we find in Table 3 regards most importantly the fact that informal solidarity is lower among people in countries that spend higher proportions of GDP on welfare: in the case of solidarity with unabled people it is expenditure on old age and disability benefits

that negatively influences solidarity, and not welfare effort itself, which can be explained by the fact that in most welfare states the largest proportion of welfare spending consists of pensions. But there are other indications for a substitution effect too. In poorer countries informal solidarity towards the elderly is lower and informal solidarity towards the unemployed and immigrants is higher than in richer countries. This fits the substitution hypothesis if one recognises that usually in welfare states, but especially in poorer countries, benefits and provisions for the elderly and disabled are at substantially higher levels, and more universally available, than those for unemployed people and immigrants. Table 3 also shows that in countries with a high average level of social capital informal solidarity towards unabled and unemployed people is higher than in countries with a low level. This fits the substitution hypothesis under the assumption that a high level of social capital in a society, rather than socialising people into norms of fellow feeling and social responsibility, conveys a general message that needy groups in society are well taken care of by the work of active citizens in civil society networks and institutions. The high trust in institutions, which is one aspect of social capital, also means that one relies on their effective role in social care for needy groups. That average social capital has no negative effect on solidarity towards immigrants might in this line of reasoning be explained by the fact that there are no traditional and well-established civil society institutions or networks that have been directed at immigrants, since in the Western societies we analyse here this group has only recently come to the fore as a problematic and needy social group.

The substitution effects found here seem to be the result of crowding out, rather than of moral corruption. "No need to be personally concerned about others, since society (or the state) takes care of them" might be seen as a core attitude of people living in more comprehensive and generous welfare states.

In addition to a substitution effect, Table 3 shows evidence for the hypothesised 'national burden effect'. Such an effect implies that informal solidarity is on average lower, if the needy group that is the subject of solidarity is relatively larger. In such cases, recognition of, or at least an uneasy feeling about, the costs that could be involved when meeting the needs might temper informal solidarity. The findings that fit this interpretation are that the informal solidarity with unemployed people is lower in countries with a high present unemployment rate than in countries with less unemployment; informal solidarity towards immigrants is lower in countries with a higher percentage of immigrants; and informal solidarity with unabled people is lower in countries with an older population.

Regarding cultural characteristics of a country, Table 3 shows that, as expected, people who live in more ethnocentric countries on average are less solidaristic towards immigrants. Furthermore, in more rightist countries informal solidarity with unabled people is higher than in more leftist countries. However, political orientation has no effect on the informal solidarity towards unemployed people and immigrants. A possible explanation for this could be that in a rightist culture more emphasis is put on deservingness criteria (of control, reciprocity and identity), on which unabled people, notably pensioners, usually score much higher than other needy groups. This would not necessarily mean that unemployed people and immigrants in a rightist culture would be seen on average as clearly less deserving than they would in a leftist culture. Our finding here is in line with that of Huddy

et al (2001), who found that American conservatives have a stronger compassion with elderly people in need than liberals.

Finally, special discussion is needed of the positive effect of a country's unemployment benefit expenditure on the informal solidarity towards unemployed people. This is contrary to the negative effect that expenditure on old age and disability benefits have on solidarity towards the unable, and thus seems to refute the substitution hypothesis. However, there is a difference in the character of the needy groups involved. Because the proportions of older, sick and disabled people in a society are relatively constant over a certain time period, the relative degree of spending on old age and disability is for the largest part an indicator of the universality and generosity of such benefits – that is, of the level and adequacy of formally organised solidarity. The higher this is, says the substitution hypothesis, the lower the informal solidarity among the population. Unemployment, on the contrary, tends to fluctuate more strongly, which means that spending on unemployment benefits is more dependent on such fluctuations than it is on benefit universality and generosity. Since our benefit expenditure figures are averages over a period of nine years a higher unemployment benefit expenditure figure therefore indicates higher average unemployment rates over that period, rather than a higher level and a more adequate form of formal solidarity. For this reason, no clear substitution effect should be expected. However, this reasoning is at odds with the national burden thesis, because it says that informal solidarity will be lower if the needy group concerned is relatively larger. For the moment we have no clear solution for this interpretation problem, but it could be that people's uneasy feelings about the size of needy groups are based more strongly on actual situations, rather than on averages or developments over time. If this is true, then we have a second argument for explaining why the relationship at issue is not negative, and we can understand why, at the same time, the countries' unemployment rate in 1998 has a negative effect. It might be then that higher unemployment in the longer run leads to an increase in a population's informal solidarity towards the unemployed, but that the present unemployment rate, through a 'national burden effect', can detract from that, if it is high.

Conclusions and discussion

The two central hypotheses we have examined here are the substitution hypothesis, advanced by welfare state pessimists, and the reinforcement hypothesis, defended by welfare state optimists. The former predicts an erosion of social capital and of informal solidarity as a result of extended welfare provision by the state. The latter predicts that the institutional matrix of the welfare state stimulates people to invest in social capital and offers them incentives and norms for informal solidarity. We have tried to test both hypotheses, at the country and individual level, by using the 1999/2000 European Values Study data.

At country level we found strikingly little variation in average levels of informal solidarity between countries. The rank ordering of informal solidarities towards unable and unemployed people and immigrants was the same in all countries, reflecting commonly applied deservingness criteria of control, reciprocity and

identity. And there was little variation in absolute levels. The grouping together of countries in regime types did not explain this variation satisfactorily. If welfare states come in types, as many students of the welfare state assume, the hypothetical clustering predicted in the literature is not discernible from our country analyses. Between-type variation was smaller than within-type variation. Whether this is a result of the blurring of regime types and the proliferation of hybrids in the past few decades, as Goodin and Rein (2001) assume, is impossible to establish empirically because we have no satisfactory time-series data at our disposal to test this idea. However, welfare state effort, in terms of social expenditure as a percentage of GDP, showed a negative correlation with informal solidarity regarding the unabled and the unemployed, which fits the substitution hypothesis. Also a variation in social capital between countries was better explained by welfare state effort than by welfare state type. There is a high positive correlation between a country's level of expenditure on social protection and the amount of social capital, which fits the reinforcement hypothesis.

It seems that, in a Western European context, higher welfare spending goes together with lesser feelings of solidarity towards needy groups, but with stronger social capital in the form of being active in voluntary associations and clubs, spending time with friends, and trusting others and institutions. Our findings seem to suggest that welfare state development, upwards or downwards, involves a trade-off between solidaristic feelings among the population on the one hand and voluntary activity and social trust on the other. Our findings refute the claim by welfare pessimists about the negative effect of welfare on both informal solidarity and on social capital, and the optimists' claim about positive effects on both matters. It seems to be a matter of 'either/or', of having the one or the other. The fact that informal solidarity and social capital are not statistically correlated when holding constant for welfare state effort supports our trade-off interpretation.

What were the results of the individual-level analyses? The individual characteristics that have a positive influence on informal solidarity with needy groups are people's social capital (being active in networks and clubs, trusting institutions and other people), being a woman, being older, being more leftist and attending church more frequently. We also found that informal solidarity depends on the type of national society people live in. A country-level variable that increases people's informal solidarity with all groups of needy people is the average level of education. All other country variables differ in their influence on the solidarity towards the three needy groups, either by the degree of their influence, or their direction. However, specific patterns of relations suggest evidence for a substitution effect, whereby formal, state-organised solidarity crowds out informal solidarity. We found, for instance, that informal solidarity tends to be weaker among people who live in countries that spend more on social protection. We also found evidence for a 'national burden' effect. Feelings of informal solidarity towards specific groups of needy people are weaker where the groups concerned are relatively larger.

Perhaps the most intriguing finding pertains to the relations between welfare state effort, social capital and informal solidarity. At the country level there appeared to be no significant correlation between social capital and informal solidarity controlled for welfare effort. At the individual level, again controlled for welfare effort, we found, however, that individual people with more social capital feel

more informal solidarity towards all needy groups, while informal solidarity towards unabled and unemployed people tends to be lower on average among all people living in countries with higher aggregate levels of social capital. One could argue that this finding is an indication of the Janus-faced character of social capital (Szreter, 2002). At the individual level people with a high amount of social capital, who cherish norms of generalised reciprocity and social responsibility, are also high on informal solidarity. People living in a country with a high level of aggregate social capital can, however, rely on the reassuring realisation that there are others who will be concerned with needy groups. Therefore, a substitution effect is discernible in the guise of an 'after you' attitude. In order to come to grips theoretically with such a situation, Sandefur and Laumann (1998) make a distinction between the private, egocentric aspect of social capital on the one hand and the public, sociocentric aspect on the other.

Of course, one can only accept our conclusions with some reservations. One reservation is that because of the lack of time-series data there was no possibility to address the question of the direction of causality satisfactorily. Does welfare state development, for instance, stimulate the building up of social capital, as Evers (2003) would claim, or is it the other way round, as Putnam (2000) would say? Is welfare only substituting informal solidarity, or is a certain level of informal solidarity necessary to have any serious welfare policy in the first place? To our regret the questionnaires of the earlier waves of EVS (1981 and 1990) contained neither the informal solidarity items, nor a sophisticated measurement instrument for social capital. Therefore, we have been forced to do cross-sectional instead of longitudinal analyses. For an ultimate test of the substitution and reinforcement hypotheses one would need panel data or, even better, life-event histories. Likewise it could be empirically profitable to treat social capital not as a uniform, albeit multidimensional construct, but as a container concept that consists of several parts that vary widely and have to be analysed separately.

Note

¹ Unfortunately, the number of cases in our data set belonging to particular ideal types is limited. The liberal Anglo-Saxon regime type is only represented in our data by the UK and Ireland, neither of which is most typical of the type (as is the USA). Norway would be a useful addition to the social democratic Scandinavian type.

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