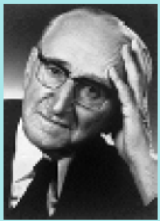




# Ordnungspolitische Diskurse

## Discourses in Social Market Economy



**Alexander Heß**

**Happiness and the Welfare State in  
Times of Globalization:**

**A Review of Empirical Findings**

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# **Happiness and the Welfare State in Times of Globalization: A Review of Empirical Findings**

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## **Abstract**

The welfare state has long been under debate. Besides various theoretical discussions, it has often been empirically investigated regarding its effects on inequality and economic growth. With the advent of the scientific field of happiness research, scholars began to discuss the welfare state's impact on well-being. Furthermore, over the last three decades, scholars have examined empirically the relationship between welfare states and 'happiness' as more and more data have become available. This article aims to review many of the empirical studies that have been conducted in this regard. Methods and findings are presented and discussed. The conclusion is that though that a larger number of studies exists which finds a positive relationship between welfare state efforts and 'happiness', the overall picture is still vague. Further research might help to add clarity by accessing more recent data and by utilizing different survey datasets on 'happiness' as well as by shifting the focus towards understanding different mechanisms how the welfare state influences the well-being of specific subgroups in the population. In addition, research on non-state welfare providers can put state-conducted efforts into perspective and thus help to gain insights into the overall impact of welfare efforts.

## **Keywords:**

welfare state, decommodification, social security expenditures, happiness, life-satisfaction, subjective well-being

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# Happiness and the Welfare State in Times of Globalization: A Review of Empirical Findings

Alexander Heß

## 1. Introduction

Scholars have studied the impact of various social, political, socio-political, cultural factors, and macroeconomic movements on subjective well-being (SWB). One of the issues many have focused on is the linkage between the welfare state (WS) and happiness in the globalized economy. At the core of this linkage lies the question whether or not the state's welfare efforts render citizens happy and if more of an effort leads to more happiness, or at least a more equal distribution of happiness. Among others, these questions have been debated theoretically and empirically for several decades. This paper aims to review a set of empirical investigations that have been conducted on this subject in the last three decades and thereby puts the hypothesis of WSs rendering people 'happier' to the test.

At the beginning, different concepts of happiness, measurement methods, their validity, and possible objections are briefly discussed. Subsequently, some arguments regarding nature and effects of the WS are presented before the studies on the empirical relationship between happiness and the WS are reviewed. Finally, conclusions are drawn and open questions for further research are outlined.

## 2. Research on Happiness

'Happiness', one could argue, is a rather vague and broad concept. There is an extensive literature about what it 'really' is and how it be achieved. Scholars of several scientific disciplines (e.g. philosophy, sociology, psychology, political science, and economics) have taken part in these investigations. Many terms are used to describe different facets and dimensions. In his book "Economics of Happiness", Frey (2018) men-

tions two extreme manifestations of 'happiness', namely momentary feelings of pleasure at one end of the spectrum and bliss or 'eudaimonia' on the other. He further names the following three (temporal) dimensions: experienced, predicted (or expected), and remembered happiness.

Diener et al. (2018a) describe the term happiness as something that can be quite confusing in a scientific setting, since its meaning differs depending on the context and the person using it.<sup>1</sup> Nonetheless, due to its popularity it might be useful for the communication of the topic with the public. Other terms such as life-satisfaction, positive affect, and positive mood seem to be more precise and therefore more appropriate in the scientific discussions. These terms are further related to the various temporal dimensions mentioned above, e.g. while positive affects are strongly associated with experienced happiness, life-satisfaction is of a more reflective nature and therefore refers to remembered happiness. They are further summarized under the concept SWB which in turn is part of the umbrella term well-being. Diener et al. (2018a) state that SWB refers "[t]o the various types of subjective evaluations of one's life, including both cognitive evaluations and affective feelings" (p. 3).

#### a. [Methods of Measurement](#)

There are different methods that are more or less well suited to measure different dimensions of 'happiness' or SWB, respectively. Measuring methods include large-scale surveys, experience sampling methods, the day reconstruction method, as well as informant reports, implicit association tests, big data analyses, and functional magnetic resonance imaging to check for brain activity in regions associated with positive and negative affects (Scollon et al., 2003; Diener & Tay, 2014; Larson & Csikszentmihalyi, 2014; Tay et al., 2014; Diener et al., 2018a; Frey, 2018; Scollon, 2018).

The studies that are reviewed in this paper draw without exception on large-scale survey results. It is the most commonly practiced way to measure SWB. Although the

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<sup>1</sup> Despite its vagueness large-scale surveys include questions on 'happiness', whose measures are utilized in the studies reviewed in this essay (see below). It is believed that questions on 'happiness' ask for a more affective response whereas questions on life-satisfaction aim for a more reflective one (Pacek & Radcliff, 2008).

questions vary slightly from survey to survey (see Table 1), they all have in common that the interviewees are asked to reflect on their mood, overall life-satisfaction or ‘happiness’. Surveys include questions on both domain-specific and global assessments of SWB. The latter assessments will be to interest in this paper as the studies that are discussed below aim at looking for the general impact that the WS on SWB. In the following table, examples from the World Value Survey, the Gallup World Poll, and the Eurobarometer are shown.

**Table 1: Survey Questions on Life-Satisfaction and Happiness**

| <b>Survey</b>            | <b>SWB – Questions on Life-Satisfaction<sup>2</sup></b>  | <b>Questions on Overall ‘Happiness’</b>   |
|--------------------------|--|---|
| World Value Survey (WVS) | “All things considered, how satisfied are you with your life as a whole these days? Using this card on which 1 means you are ‘completely dissatisfied’ and 10 means you are ‘completely satisfied’ where would you put your satisfaction with your life as a whole?”   | “Taking all things together, would you say you are (read out and code one answer): 1 Very happy 2 Rather happy 3 Not very happy 4 Not at all happy”.  |
| Gallup World Poll        | “Please imagine a ladder, with steps numbered from 0 at the bottom to 10 at the top. The top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you. Just your best guess, on which step do you think you will stand in the future, say about five years from now?”<br>“All things considered, how satisfied are you with your life as a whole these days? Use a 0 to 10 scale, where 0 is dissatisfied and 10 is satisfied.” | NONE  |
| Eurobarometer            | “On the whole, are you very satisfied, fairly satisfied, not very satisfied, or not at all satisfied with the life you lead? Would you say you are ...?” (1. Very satisfied; 2. Fairly satisfied; 3. Not very satisfied 4. Not at all satisfied; 8. Do not know, No answer; 9. Inapplicable).  | “Taking all things together, how would you say things are these days – would you say you’re very happy, fairly happy or not too happy these days?” (1. Very happy; 2. fairly happy; 3. Not too happy; 8. Do not know, No answer). |

Source: *WV6 Official Questionnaire (2012)*, *Gallup World Poll Questionnaire (n.d.)*, *Codebook of the GWP (2017)*, *Codebooks of the Eurobarometer Survey (2009)*.

<sup>2</sup> Each of these surveys also include domain-specific SWB questions which are not displayed here.

It may seem obvious that the best way to find out how happy people are with their life, is to ‘simply’ ask them about it. However, not only are there some obstacles to overcome when one embarks on such an endeavor, but also a lot of reasons to doubt the validity of this technique. In the following, these problems are addressed.

#### b. Validity, Reliability and Comparability of Self-Reported SWB Measures

It is understandable that scholars might be hesitant to believe the validity and reliability of the self-reports. After all, it may appear logical that these self-assessments are susceptible to cognitive biases. Concerns have been there from the very outset of this research agenda and have persisted ever since.

One of the issues lies in the order of questions asked, and how they matter to the interviewee. Deaton and Stone (2016) investigate these context effects for different life evaluations. They find that asking political questions upfront carries the potential to negatively impact the responses on the subsequent questions about life evaluations if the participants were expressing an unfavorable opinion to the former one. To solve this issue, one might either place context-sensitive questions at the beginning or insert a transition question<sup>3</sup> after the political ones, which in their study showed to eliminate the effect (Diener et al., 2018a).

Another problem is the potential distortion that might occur due to irrelevant factors like the weather prevailing on the day when the self-assessments take place. Although several studies find the effect to be rather small (several of those are listed in Diener et al., 2018b), such factors may nevertheless carry the potential of being unfavorable and obscuring for the possible conclusions that could be drawn from the survey results. Moreover, since the mood tends to fluctuate throughout the day and week, both the time of the day and the day of the week on which the questions are asked need to be chosen carefully (Csikszentmihalyi & Hunter, 2003).

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<sup>3</sup> For instance “Now thinking about your personal life,” (Diener et al., 2018a, p. 6).

Despite these and other doubts, researchers find these self-reported measures to be quite valid because they correlate with other external ‘happiness’ measures, such as attitudinal characteristics (e.g. smiling and laughing), assessments of one’s happiness as produced from people in the interviewees inner social circle (like family and friends), clinical trials of one’s cortisol release, and positive and negative terms used in social media (Steptoe et al., 2005; Schneider & Schimmack, 2009; Seder & Oishi, 2012; Saslow et al., 2013; Schwartz et al., 2013; Diener et al., 2018b). Furthermore, Schimmack and Oishi (2005) find some proof for their stability, as the answers from participants that were tested and retested within a month did not show a sizable discrepancy. Using country averages, like most of the studies reviewed in this paper, is expected to further improve the validity and reliability by compensating for possible reply errors, measuring faults, and imprecisions. In addition, the comparison of different countries raises other concerns regarding the comparability of the SWB data. Commonly addressed in the literature are the social desirability bias (in the upward or downward direction) as well as linguistic or semantic problems (Radcliff, 2001).

Social desirability refers to the over- or underreporting of one’s SWB due to country-specific cultural norms or social pressures. Veenhoven (1996) runs several tests, for instance by comparing the averages of life-satisfaction in countries with different value hierarchies, and finds no empirical support for the existence of social desirability.

Regarding the semantic issues, the connotations and meanings of terms like ‘happiness’ and ‘satisfaction’ do not only vary across individuals, but at least as much across different languages. This is obviously an issue to be considered. However, Inglehart (1990) and Veenhoven (1996) find no evidence for the existence of such linguistic biases. They compare the average levels of life-satisfaction across different language groups within bilingual nations and find no difference. Furthermore, the rankings of countries average levels of life-satisfaction and ‘happiness’ as well as of self-assessments on questions about the “best and worst possible lives” show a similar pattern (Veenhoven, 1996). Nonetheless, it would be hard to argue that cultural, language, and country-specific differences do not exist. Hence, the conclusions that one might draw from comparing countries that differ greatly in language and culture should be treated with caution.

In sum, several doubts and obstacles exist, and a lot of attention in this field is given to validity of the results in this research program. Despite those potential obstacles and imprecisions, Diener et al. (2018b, p. 5) see, overall, SWB “[a]s a very useful indicator of personal and societal quality of life”.

### 3. The Concept of the Welfare State

Although the concept of the WS could be less vague than ‘happiness’, and therefore defining it shall be less problematic, as Veenhoven (2000) argues, there are nonetheless several definitions out there, which differ in what constitutes the WS’s efforts in the scope of services included. The most cited (and most criticized) work of Esping-Andersen (1990) identifies that it is quite common to describe the WS as the responsibility of the state to provide citizens with a basic minimum of welfare. He as well as Veit-Wilson (2000) further explain why such a definition is not sufficient, since it could include almost any direct or indirect measures of the state that could potentially affect citizens’ ‘welfare’, and the term could then be used interchangeably “with any word referring to modern industrial states” (Veit-Wilson, 2000, p. 2).

Since it is not the aim of this paper to go deeply into discussing the various nuances of different conceptualizations, the following description of Briggs (1961) should suffice to grasp the underlying notion, and to lay the foundation. Nevertheless, it has to be noted that a method of measurement of the WS efforts could prove to be more or less accurate, depending on what is included into the scope of the WS effort:

“A ‘welfare state’ is a state in which organized power is deliberately used (through politics and administration) in an effort to modify the play of market forces in at least three directions—first, by guaranteeing individuals and families a minimum income irrespective of the market value of their work or their property ; second, by narrowing the extent of insecurity by enabling individuals and families to meet certain ‘social contingencies’ (for example, sickness, old age and unemployment) which lead otherwise to individual and family crises ; and third, by ensuring that all citizens without distinction of status or class are offered the best standards available in relation to a certain agreed range of social services.” (Briggs, 1961, p. 228)



By these measures, the WS seeks to ensure its citizens' well-being, especially those in financial or social need (Orosz, 2017). Through the utilization of SWB measures, the young field of happiness research can help to examine the WS's performance in achieving this goal.

#### 4. Welfare States and Happiness – A Positive Relationship?

The WS has been the object of debate since the very beginning of its existence (Veenhoven & Ouweneel, 1995). On the one hand, it has been accused by its opponents of hindering economic growth, of failing to promote equality, of being associated with social stigma and lower self-esteem, as well as of reducing the sense of autonomy among its beneficiaries and of displacing non-state welfare providers such as church, friends and family, thus weakening social ties, leading to social exclusion and ultimately to feelings of loneliness (Pacek & Freeman, 2017).

Its advocates, on the other hand, praise it for its apparently positive effects in terms of reducing poverty and inequality, securing living standards, contributing to the satisfaction of basic needs, and, more generally, protecting against the negative effects of the arbitrariness of market economies and thereby improving the quality of life (Veenhoven & Ouweneel, 1995).

These matters mostly refer to possible outcomes in specific areas of life, but do not address the WS's impact on a more fundamental level of SWB. Thus, the following hypothesis will be examined:

*Hypothesis: WS efforts contribute to the SWB of citizens living under these conditions, and WSs that are more generous lead, ceteris paribus, to higher SWB levels.*

The theoretical basis for this hypothesis can be found in the so-called livability theory, which predicts that people are more satisfied with their lives when their absolute living conditions improve, regardless of their relative position (Veenhoven & Ehrhardt, 1995). It is thereby closely connected to the idea in Maslow (1970) about the existence of universal human needs (Radcliff, 2001).

In contrast, the comparison, adaptation, and trait theories as well as cultural theory neglect the WS's influence or predict it to be rather insignificant. These theories are described below.

- *Comparison theory* states that people assess their life based on their perceptions or their standards of how their lives should or could be. Following that logic, improvements in the living conditions within a country will raise these standards, a process which leads to the average level of SWB within a country to remain more or less the same, since there are people living below and people living above one's standard (Veenhoven & Ehrhardt, 1995).
- The combination of *adaptation and set-point theory* suggests that the individual's SWB is adaptive to both bad and good events as well as conditions, and only temporarily fluctuates before returning to an 'innate' individual-specific set-point, which means that changes in living conditions should not cause lasting changes in SWB (Lucas, 2007).
- *Trait theory* assumes the individual's happiness (and thereby SWB) to be dependent on the personal character, acquired dispositions or even inborn temperament, and thus SWB is not sensitive to external changes of living conditions (Veenhoven, 1994). Its societal variant, *folklore or cultural theory*, predicts SWB levels to be rooted in tradition and is therefore strongly dependent on cultural or nation-specific characteristics (Veenhoven & Ehrhardt, 1995).

Over the past three decades, scholars have begun to supplement these *theoretical* debates by investigating the relationship of the WS and SWB *empirically*. The different approaches and findings are addressed below. The ones that find no correlation between SWB and WS or a negative one will be presented first, followed by the studies that find a positive correlation. Studies that could be put somewhere in-between, or focus on specific aspects of the WS, are presented last. In most of the studies, the scope of the WS is measured via the social security expenditures as a percentage of GDP or the degree of decommodification (as explained in section 4.2).

## a. Against the Correlation

The Dutch sociologist and social psychologist Ruut Veenhoven, a strong advocate of happiness research<sup>4</sup>, investigated the present topic several times with outcomes that consistently contradicted his initial expectations.

### **Veenhoven & Ouweneel (1995)**

In his study co-authored with Ouweneel (Veenhoven & Ouweneel, 1995) he compares nations with differing levels of WS efforts according to their 'livability' level. In the authors' conceptualization "[l]ivability refers to the degree to which provisions and requirements of a society fit with the needs and capacities of its members" (p. 2). They further note that "[a] society is unlivable if it fails to gratify basic human needs" but also "[i]f it demands the impossible" (p. 2). Since 'livability' cannot be measured directly, they discuss different options of measuring it indirectly, and decide to look at life-expectancy and life-satisfaction as the important markers for how livable a society is.

The scope of the welfare efforts is measured by various indicators, which they categorize into 'legal' and 'financial' ones. For the legal ones, Estes' Welfare Effort Subindex (Estes, 1984) is used as a measure of how long a state welfare effort has been in place. It is a sub-index of Estes' Weighted Index of Social Progress (Management Institute for Quality-Of-Life Studies, n.d.) and consists of five indicators for the age of different social protection laws (e.g. age first national laws – old age, invalidity & death, age first national laws – sickness & maternity; age first national laws – family allowance). In addition, the authors include the decommodification score from Esping-Andersen explained in Section 4.2 as a measure for the amount of welfare efforts. However, most of their tests are carried out using financial indicators: These are social security expenditure data provided by the Organization for Economic Development (OECD), International Labour Organization (ILO), and the International Monetary Fund, as well as various estimates for government expenditures like total expenditures per capita, the amount of disbursements, and the governments consumption as a percentage of GDP.

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<sup>4</sup> Veenhoven, one of the founding editors of the Journal of Happiness Studies is also the founding and current director of the World Database of Happiness – an archive of research findings in the SWB area.

The authors look for correlations between these variables across countries in the year 1980. They also test for a longer time period (due to limited availability of data, the time period can differ for different indicators) to see if any changes in 'livability' could be associated with changes in the welfare effort.

They first compute zero-order correlations which are then controlled for economic prosperity (income per head) and economic growth. The zero-order calculations result in higher life-satisfaction in nations that provide most welfare efforts. Controlling for economic prosperity lets this effect disappear. Furthermore, no support for the correlation of welfare efforts rendering nations more liveable over time is found and more welfare efforts do not lead to higher life-expectancy and life-satisfaction. However, the authors also find no support for the alternative hypothesis.

It is concluded that the state's welfare contributions do not generate a more livable society and that seemingly non-state welfare contributions (family, friends etc.) can do an equally good job.

### **Veenhoven 2000**

Veenhoven (2000) approaches the issue again in a similar fashion and confirms previous findings by comparing the states' welfare efforts of 40 nations to the degree to which citizens within these countries conduct a happy and healthy life. In his reproduction of the earlier study, he not only relates to another time period but also utilizes a slightly different set of variables in his models.

Like before, for the measure of well-being (dependent variables) he uses indicators from the two separate categories 'health' and 'happiness'. In the 'health' category, life-expectancy is complemented by a measure of self-reported health taken from the WVS, and in the category of 'happiness' he adds self-reported measures of mood and happiness to the degree of how satisfied people are with their life.

This time, solely social security expenditures are used as the proxy for the size of the states' welfare-efforts, and the data stems from the International Labour Organization (ILO, 1996). In addition to comparing countries average levels of health and SWB for the year 1990, Veenhoven also examines the dispersion of both within these countries,

and thereafter looks for possible changes during the period from 1980 to 1990. Similar to the 1995 study, he first calculates zero-order correlations and then controls for the nations affluency, but this time it is measured by real per capita purchasing power.

At the end he comes to the following conclusion: “There appears to be no link between the size of the welfare state budget and the average level of wellbeing” (Veenhoven, 2000, p. 24). He further finds no connection between the monetary size and the degree of how equal health and SWB are distributed throughout the citizens. Nor do changes (increases or decreases) in expenditures appear to correlate with them (health and SWB).

However, his study has later been criticized for almost exclusively focusing on raw expenditures as the indicator of the states’ welfare efforts. Veenhoven’s reliance on rather simple statistical methods, which mainly involve correlations, has also been raised as an issue (Pacek & Radcliff, 2008; Pacek & Freeman, 2017).

### **Ouweneel 2002**

Both studies mentioned above examine the impact of WS efforts on SWB of the general population. The specific subject to Ouweneel’s study (Ouweneel, 2002) are the unemployed, since they should be among the citizens likely to benefit most from extensive support. In terms of indicators of well-being, he again deals with self-reported measurements of health, overall happiness, life- satisfaction, and mood, while drawing the data from the WVS. The states’ welfare efforts, on the other hand, are again measured by social security expenditures taken from the ILO (1996) which covers nine areas of social security<sup>5</sup>. In order to differentiate between the employed and the unemployed, Ouweneel relies on the self-reported job-status, which stems from the WVS as well.

From a procedural point of view, he first verifies whether there are differences on average self-reported health and SWB between employed and unemployed persons, and then examines these differences in a cross-country comparison for 1990. Thereafter, he tests for possible changes that might occur over time by comparing 1980 levels with those of 1990.

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<sup>5</sup> It includes medical care, child allowances and allowances for illness, unemployment, aged, disablement, pregnancy, invalidity, and war victims (Ouweneel, 2002).

After controlling for national wealth in the cross-sectional analysis, he finds hardly any correlation between the level of social security expenditures and the varying levels of self-reported health and SWB of the unemployed. Overall, though some results support the hypothesis of a positive effect of the WS efforts on SWB, most of his findings suggest that less generous WSs perform equally well. In particular, reductions in social security expenditure in countries that started out with high spending levels in 1980 correlated with some decline in health and SWB by 1990. However, the picture is less clear when it comes to the impact of increases in spending. In some countries increases correlated with greater health and SWB and in other countries with less, regardless of having started out with a relatively high or low expenditure budget in 1980.

#### b. In Favor of the Correlation

Although the results of the above-mentioned studies may be quite sobering, there are also a number of studies that come to the opposite conclusion. One of the studies that first find support for the hypothesis was published by Benjamin Radcliff in 2001.

##### **Radcliff 2001**

The original purpose of Radcliff's study (2001) is to examine whether or not political factors have an influence on the citizens' self-reported life-satisfaction in industrialized countries, and to check if cross-national differences in SWB can to some extent be explained by these political factors. Radcliff thereby aims to assess the validity of the differing theories surrounding this issue that are explained in the beginning of Section 4.

In order to create a holistic picture in pinpointing 'happiness' influencing factors, he analyzes the data on life-satisfaction<sup>6</sup> on an aggregated national level, on an individual level, and on a hybrid of both. Radcliff uses operationalizations of the general WS efforts and one indicator for the dominance of left-wing parties over the right-wing parties as the major independent variables. The two former ones include three indices which indicate how many features a country of the categories socialist, conservative, and liberal has, and he further utilizes a score for the decommodification of labor.

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<sup>6</sup> The data on life-satisfaction is taken from the 1990 to 1993 wave of the WVS.

The concept of the decommodification score as described by Esping-Andersen (1990) stems from his criticism of the status quo of measuring the efforts of WSs by their expenditures (see p. 19). As the name implies, decommodification describes the extent to what citizens (or more precisely labor) is emancipated from market forces. Esping-Andersen notes that “de-commodification occurs when a service is rendered as a matter of right, and when a person can maintain a livelihood without reliance on the market” (Esping-Andersen, 1990, pp. 21-22). He goes on mentioning that “[a] minimal definition must entail that citizens can freely, and without potential loss of job, income, or general welfare, opt out of work when they themselves consider it necessary” (p. 23). It is operationalized in a summary index that includes pensions, income maintenance for the ill or disabled, and unemployment benefits. The higher the score of the summary index, the higher the degree of decommodification.

Following the same underlying logic, Radcliff (2001, p. 941) argues that SWB should further be determined by the “[e]xtent to which a program of ‘emancipation’ from the market is institutionalized within a state.” Life-satisfaction should be higher in states where the dominance of political parties in the government is committed to lifting people out of market dependence. Thus, Radcliff adds the level of dominance of left-wing over right-wing parties as an indicator for such a commitment.

The main control variables in use are the rate of the unemployment (data from Hall & Franzese, 1998), real per-capita GDP in purchasing power parity for 1990 (from the Penn World Table, version 5.6), and the degree of individualism to address differences in culture (as devised by Triandis, 1989, 1995). Depending on the model he is testing, he also adds other variables.<sup>7</sup>

Through his analysis, Radcliff finds support for the livability theory in the sense that political conditions seem to play an important role when it comes to the degree of life-satisfaction reported by the citizens. Governments with a larger share of the political left (*ceteris paribus*) result in citizens with higher life-satisfactions scores. He also finds

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<sup>7</sup> For instance, in the individual level models he adds variables like the number of children, gender, marital status, reported quality of home life, household income, church attendance etc. from the 1990 WVS (Radcliff 2001, p. 944).

support for the positive influence of the decommodification (and social democratic welfare-regimes) on life-satisfaction. Thereby disproves the comparison theory, and to some extent relativizes the cultural theory. Though culture does indeed seem to have an influence, political factors loom large. In order to avoid problems by incorporating developing or developed countries, the author focuses on nations that are industrialized democracies, which leads him to use a rather small sample size of 15 countries which, as the author himself puts it, “[i]mposes obvious econometric limitations” (Radcliff, 2001, p. 948).

A further limitation of Radcliff’s study is the lack of data on decommodification. He was limited to a cross-sectional study because Esping-Andersen’s score was available for one point in time only.<sup>8</sup> Therefore, his study lacks a longitudinal component as he does not check for possible variations over time.

### **Pacek & Radcliff 2008**

In a later study, Pacek and Radcliff (Pacek & Radcliff, 2008) address this problem when a time-series data set for decommodification, calculated in a similar way to that of Esping-Andersen (Scruggs & Allan, 2006), becomes available.<sup>9</sup> They assess the impact of WS’s efforts of 18 industrialized nations by its effect on ‘happiness’ and ‘life-satisfaction’ across time from 1981 to 2000. Controlling for a number of variables that the empirical research found to be essential for determining SWB, they find support for a positive correlation between WSs that perform well on the decommodification score and ‘happiness’ or ‘life-satisfaction’ of their citizens. Such controls include demographical indicators<sup>10</sup>, levels of trust, and a set of dummy variables for each nation’s specific and rather stable cultural, economic, and social conditions. The authors note that, “[t]he effect of the dummies is, of course, to fit separate intercepts for each country, thus accounting for the large and sustained differences in satisfaction that one might expect to result from different cultural and institutional contexts” (Pacek & Radcliff, 2008).

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<sup>8</sup> Esping-Andersen calculated the summary index for 18 countries for the year 1980. (Esping-Andersen, 1990)

<sup>9</sup> The authors draw on Scruggs time-serial data set on decommodification which to that time covered 18 advanced industrial countries from 1971 to 2002. The most recent version of the data set was last updated on September 2017 and covers at a total 33 countries and the decommodification score of 22 countries.

<sup>10</sup> Such as gender, age, marital status, number of children, employment status of the main wage owner, church attendance, household income, and real GDP per capita.



### **Pacek & Freeman 2017**

Pacek and Freeman (2017) put the WS to the test again with a similar approach to that by Pacek and Radcliff (2008). However, they make modifications to the model by changing some of the explanatory and control variables. Together with decommodification and the indicator of 'left-wing dominance' that Radcliff (2001) made use of, they utilize social wages operationalized by the "[i]ncome that a typical unemployed worker can expect to receive by status of his citizenship rather than market participation" (Pacek & Freeman, 2017, p. 12) for the independent variables. Compared to the study from 2008, they use a smaller variety of control variables, namely unemployment rate and a set of dummy variables. Again, as in Pacek's and Radcliff (2008), the dummies account for country-specific differences (e.g. culture and economic differences). Furthermore, the authors first work with data on life-satisfaction of 11 countries from the Eurobarometer for the time period from 1975 to 2002, and then try to confirm their results with data of 17 industrialized democratic countries for the years 1981 to 2000 coming from the WVS. For both tests, each coefficient of the three independent variables (decommodification, social wage, left-wing dominance) is significant and of the expected sign. Hence, they find support for the hypothesis that WSs positively impact life-satisfaction (SWB) across time.

Further support for the hypothesis is found by Di Tella et al. (2003), Kotakorpi and Laamanen (2010), and Dumbraveanu (2015).

### **Di Tella et al. 2003**

Di Tella et al. (2003) investigate the impact of macroeconomic movements on SWB in European countries. They examine, among others, the development of unemployment and its detrimental effect on life-satisfaction, and conclude that these negative effects can be mitigated by generous WSs. In other words, they found higher unemployment entitlements to correlate with higher scores of self-reported SWB at the national level of the countries considered.<sup>11</sup>

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<sup>11</sup> The authors draw on happiness (1975 to 1986) and life-satisfaction scores (1975 to 1992) of 12 European countries from the Eurobarometer and on similar kinds of information about the United States (1975 to 1994) from U.S. General Social Survey. For the indicator of generosity, they utilize the OECD index of (pre-tax) replacement rates which are computed by the unemployment benefit entitlements divided by the corresponding wage (Di Tella et al., 2003).

### **Kotakorpi & Laamanen 2010**

Kotakorpi and Laamanen (2010), for their part, find that despite varying effects between different groups in society, high health care expenditures appear to have a positive influence on the life-satisfaction of Finnish citizen in the year 2000. In Finland, primary health care is organized on the municipality level. For this reason, the authors use individual level data on life-satisfaction and the interviewees' place of residence taken from the WVS which makes it possible to match the health care effort with the life-satisfaction levels in different municipalities. Their results suggest that at the margin, middle-income individuals prefer higher public expenditure than high- or low-income individuals. However, their results must be taken with a grain of salt as they focus on only one country with its specific WS.

### **Dumbraveanu 2015**

Looking at 21 EU countries over the period 2004 to 2011, Dumbraveanu (2015) finds social expenditures and life-satisfaction to be positively correlated with each other, and countries that spend more also show higher life-satisfaction levels.

To test her hypotheses, Dumbraveanu uses a 'social utility' function with the explanatory variables being GDP per capita, social expenditures, and a measure of variation in government debt. Among other results, Dumbraveanu (2015) finds the spending levels on social welfare to lead to an increase in public debt. She notes that within the sample "[c]ountries have been increasing government debt levels over an optimal level as a result of growing expenses with social protection programs" (p. 1577).<sup>12</sup>

Dumbraveanu's study faces quite some limitations, of which the author herself mentions a couple. First, the outcomes seem to be influenced by her chosen estimation methodology. Second, the small time-span may not properly reflect the relationship between government debt and social expenditures. Finally, she mentions the lack of control variables. To add to this, one has to take into account the events that fall into the observed time period, namely the impacts of the financial crisis from 2007 that

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<sup>12</sup> For her calculations of the 'optimal government debt level' Dumbraveanu uses restrictions that "...are based on the argument that government debt has a negative impact on income"(Dumbraveanu, 2015, p. 1570).

developed into a severe recession in 2008 to 2009. In such periods of economic downturn, social expenditures tend to grow together with the amount of people in need of social protection. Changes in expenditures are therefore not necessarily accompanied by a more or less generous WS (Scruggs & Allan, 2006; Anderson & Hecht, 2015).

### c. Further Studies

#### **Rice et al. 2006**

Rice et al. (2006) directly refer to and expand on Radcliff's research from 2001 by trying to replicate his results and thereafter make incremental changes and additions to his models as well as the data in use.

They include the following steps of modifications. First, the authors mention a data coding error for 'Austria' that was present in the original version of the 1990 WVS and therefore, after replicating Radcliff's results, they run the analysis again with the data of an updated version of the 1990 WVS. Second, they go on adding social capital, in particular 'trust', as another control variable for culture. Third, by utilizing data from the General Social Survey and matching it with the 'trust' scores, they investigate to what extent culture not only influences the levels of self-reported SWB, but also the potential drivers behind it, in this case referring to the regime type (referring to the typology of Esping-Andersen). Finally, again by utilizing General Social Survey data they test for potential reverse causality, theorized by the idea that happier people might be more willing to share with others and therefore favor the types of WS efforts present in social democratic welfare regimes.

The outcomes vary greatly depending on their modifications of the models. Some of their models result in positive correlations between the state welfare expenditures and SWB, while other models lead either to no or even negative correlations. Furthermore, Rice et al. find some evidence that the causal relationship may actually be reversed.

### **Anderson & Hecht 2015**

Anderson and Hecht (2015), in contrast to the studies mentioned above, argue that it is not only about how much social protection the WS provides, but also how it is constituted. In their study, they discuss the differing findings from Veenhoven and Radcliff. Two of Veenhoven's (2000) explanations for a neutral relationship lie in the crowding out of non-state welfare providers, and the potential offsetting effect of individual freedom. After discussing the main findings from Radcliff and Veenhoven, Anderson and Hecht (2015) try to resolve the issue by arguing that to some extent both sides of the 'empirical debate' might be correct. For them, the reason for the discrepancy lies within the composition of the WS or, more specifically, in the regulation of the labor market. Thus, in their study they do not only look at decommodification, but also at labor market regulations. Furthermore, they indicate that there might exist other means in which the WS impacts SWB.

After running a multi-level regression, they find some evidence that labor market flexibility and decommodification are positively correlated with life-satisfaction, which is found to be the highest in nations that combine both flexible labor markets with a high degree of decommodification. In contrast, WSs with more strict regulations carry the potential to counterbalance the positive effects of decommodification. Additionally, the magnitude of both impacts on SWB seems to be dependent on the labor market status and on individual specific characteristics<sup>13</sup>. Their findings suggest that, due to various mechanisms, different kinds of WSs might indeed produce different outcomes regardless of the level of decommodification they provide, and that people living under liberal and social-democratic regimes are more satisfied than those living under conservative regimes.

### **Okulicz-Kozaryn et al. 2014**

Okulicz-Kozaryn et al. (2014) address the paradox that occurs if the findings from Radcliff, Pacek etc. are correct. If people living under liberal and social-democratic regimes indeed are more satisfied with their life than those living under conservative regimes, then it seems to contradict the justification theory which suggests that individuals with a more conservative political orientation report higher SWB. Okulicz-Kozaryn et al.

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<sup>13</sup> For instance, the impact on SWB varies according to the level of education, gender, age, and employment status (Anderson & Hecht, 2015).

(2014) hypothesize that the paradox occurs because of the type of measurement. The results of their analysis show that, on the one hand, 'enacted political orientation', measured by decommodification, welfare spending (measured as the total public social expenditure as a percentage of GDP), and equality (captured by the Gini Index), proves liberal and social-democratic regimes to be more SWB-inducing (in terms of life-satisfaction). On the other hand, conservative individuals showed to be more satisfied with their life, when measures of self-reported political orientation were taken as the explanatory variable.

## 5. Conclusion and Further Research

The core question of this review – whether the 'WS' renders citizen 'happy' – is of course still open to debate. Depending on one's conceptual apparatus, not only the theoretical debates, but also the empirical analyses and their outcomes as well as policy implications differ quite considerably.

Although the amount of studies that find a positive correlation between some WS efforts (e.g., measured as decommodification, left-wing dominance, or social expenditures) and SWB outnumber the ones that find no correlation or a negative one, it is still not clear through what specific mechanisms the WS fosters, hampers or even constrains SWB. Future research should try to solve this riddle about the WS in various ways. Scholars could try to replicate previous results by utilizing more recent data, includes measures on SWB as well as measures which indicate the welfare efforts of a state.

As to the former, instead of WVS one could access datasets from another large-scale survey, such as the Gallup World Poll, and compare the results with those obtained with measurements from the WVS. New insights into the causes of international differences (e.g. cultures) in SWB will further help to sharpen the tools necessary to understand cross-country or cross-cultural differences in the impact of WSs. Moreover, if more SWB data obtained through other measurement methods like the day reconstruc-

tion method become available, it would be possible to explore the influence of the welfare efforts on different dimensions of happiness (mentioned in Section 2) and thereby create a more holistic picture.

Regarding the efforts of the WS, it remains questionable whether measuring these efforts only on the basis of aggregated social security expenditures levels, will either conceptually or empirically help to bring much more insights into the debate, since it seems to be a too rough of a measure. As discussed in Section 4.2, these aggregated expenditures do not always reflect reality, since overall increases do not necessarily imply that there have been increases at the individual level. The use of decommodification scores, in turn, appears to have become the standard practice for this purpose. Although it might be the best measure available, this does not mean that it comes without doubts and limitations. Veenhoven and Ouweneel (1995, p. 6) mentioned early on that a “[p]roblem with this approach is that the package of welfare services is not identical in all welfare states. So this indicator compares only to what extent welfare states provide more or less of the same, but does not grasp unique services and package composition.”

Apart from the measuring methods and indicators in use, the focus of research could shift towards studying different mechanisms whereby the WS and its institutional design potentially impact individual’s SWB. As discussed in Section 4.3, Anderson and Hecht (2015) have made a first attempt in this direction by taking a look at labor market regulations. Additionally, one could further investigate the WS’s impact on the SWB of specific sections or subgroups of the population and fine-tune the research by looking for connections to different individual characteristics. Lastly, such a debate could benefit from data on non-state-welfare which might substitute or complement the effects of state welfare efforts and help to reveal insights in the overall impact of welfare efforts.

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