

# Public Pension Reform in Southern Europe: Government Unilateralism vs. Corporatist Social Bargaining

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## | Abstract |

Studies on welfare reform in advanced European countries have established two prominent pathways to welfare retrenchment: government unilateralism and corporatist social bargaining. While having accumulated extensive evidence to substantiate these reform dynamics, existing studies have not provided comprehensive sets of analysis to cover complex causal configurations lying behind. This article examines a series of conjunctural hypotheses that present more exhaustive specifications of relevant causal conditions. It tests these hypotheses against public pension reform cases drawn from four Southern European countries: Italy, Spain, Portugal, and Greece. A total of 24 reform cases from the 1990s to 2010s are analyzed using the fuzzy-set qualitative comparative analysis (fsQCA) method.

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**Key Words** | Welfare Reform, Public Pension, Government Unilateralism, Corporatist Social Bargaining, Southern Europe, FsQCA

## I. Introduction

Welfare reforms in recent decades brought substantial cuts to social security benefits across European countries. Scholars have identified two prominent ways that governments promoted these changes: unilateralism and corporatist social bargaining. In the former, governments took a top-down approach to press for welfare retrenchment without negotiation with beneficiary groups. In the latter, governments sought institutionalized negotiation with the stake holders to reach coordinated policy settlements.

While unilateralism was a prevalent choice in countries where welfare beneficiaries were weak, more variety was observed in other parts of Europe where welfare beneficiaries remained strong (Palier 2010; Schludi 2005, 62-3, 2008; Taylor-Gooby 2002). There, governments promoted corporatist bargaining when they were politically weak and their reform initiatives were supported by welfare beneficiaries. Governments, however, opted for unilateral cuts when they enjoyed enough political power to bypass these beneficiaries (Baccaro and Simoni 2008; Hamann and Kelly 2011; Schludi 2008) or when serious macroeconomic crises necessitated urgent policy responses for swift recovery (Angelaki and Carrera 2015; Kuipers 2006; Vis 2010).

Existing studies have accumulated extensive evidence to substantiate these reform dynamics, but their analyses have been rather limited as regards the scope of causal explanation. All empirical works cited above address only parts of the whole causal configurations at work, thereby leaving their empirical results potentially vulnerable to mis-specification errors. The present study revisits these existing accounts in more comprehensive sets of analysis. It demonstrates these causal conditions remain significant, but only as parts of

broader joint causation that involves other relevant conditions. In particular, the author finds that strong governments or economic crises promote unilateralism only in so far as welfare beneficiaries are unsupportive of the reform agenda. The combination of weak governments and consensus with welfare beneficiaries also promote corporatist bargaining only in a context where their nations do not face serious economic crises.

To substantiate these conjunctural causal claims, the present study examines public pension reform cases drawn from Southern European countries from the 1990s to 2010s. Southern cases present a solid empirical ground for testing these hypotheses, by allowing wider variations in the outcomes of interest. Unlike English-speaking countries, which were known for weak welfare beneficiaries, Southern European governments faced stronger beneficiary groups that they had created through generous pension-heavy welfare programs (Karamessini 2008; Mari-Klose and Moreno-Fuentes 2013). This prevented the governments from endorsing unilateralism as their dominant reform strategy. Southern European cases also offer wide variation in relevant causal conditions, if compared with Continental and Northern cases. While all these European cases exhibited considerable variations in the political conditions for unilateralism and corporatist bargaining, such as government power and welfare beneficiaries' responses to the reform (Baccaro and Simoni 2008; Hamann and Kelly 2011; Schludi 2008), only Southern European cases produced notable variation in the macroeconomic condition—as shown by the fact that all major European economic crises during the 2000s and 2010s occurred in the peripheral Europe (Angelaki and Carrera 2015; Carrera, Mariana, Carolo 2010). This additional feature allows Southern Europe to have a more balanced set of cross-case variations in the paths to welfare reform.

The author examines these reform cases by employing an innovative research method called fuzzy-set Qualitative Comparative Analysis (fsQCA). Being discussed in more details in the method section, fsQCA is designed for a medium-N situation where the nature of causation involves plural conditions that work together in combination (Ragin 2000, 2008). It therefore works ideally for the present study which explores multiple conjunctural paths to welfare reform.

The following sections present a brief review of existing accounts of welfare reform in Europe. It also presents a series of conjunctural hypotheses to unilateralism and corporatist bargaining, whose validity will be tested against 24 cases of public pension reforms collected from Italy, Spain, Portugal, and Greece from the 1990s to the 2010s. These data are analyzed using fsQCA techniques. The concluding section summarizes major empirical findings of this study, as well as their implications for future research.

## II. How Governments Promote Welfare Retrenchment in Europe: Existing Studies and New Accounts

A series of welfare reform in recent decades resulted in significant cuts in contributory social insurance programs across European countries. Although governments were initially hesitant to introduce these unpopular policies (Pierson 1994), they eventually made successful reforms, assisted by various political, institutional, and ideational factors that helped minimizing electoral backlashes from welfare cuts and maximizing political credits for introducing long-awaited policy changes (Armingeon and Bonoli eds. 2006; Bonoli and Natalie eds. 2012; Palier 2010).

European governments employed diverse approaches to promoting their goals. Where governments faced weak welfare beneficiaries, they mostly chose unilateral retrenchment as their dominant strategy. Because the resistance from within the welfare system was not strong enough, governments were able to enjoy broad freedom in pushing for benefit cuts that they found necessary (Anderson and Meyer 2003, 26; Natali and Rhodes 2008, 28; Schludi 2005, 62-3, 2008, 52; Taylor-gooby 2002). Meanwhile, governments faced more diverse choices when welfare beneficiaries were strong. Concerned with potential political backlashes that unilateral pension cuts could trigger, governments in general were more open for negotiation with the beneficiaries (Bonoli and Natalie eds. 2012; Palier 2010), although their final choices depended on the following interacting conditions.

First, the political strength of involved actors as well as their policy preferences were important. Corporatist bargaining occurred when governments were politically weak but their reform plans were widely supported by welfare beneficiaries. Political weakness forced governments to be seriously interested in social bargaining, and the support from welfare beneficiaries made such effort viable by aligning the policy preferences between the two sides. Governments, however, made a different choice when they were politically strong enough. Confident in their ability to deal with political backlashes that the cuts might produce, strong governments pushed hard for their reform agenda regardless of the responses from welfare beneficiaries (Avdagic 2010; Baccaro and Simoni 2008; Carrera, Mariana, and Carolo 2010; Hamann and Kelly 2011; Schludi 2005, 2008).

National economic condition also played an important part in determining governments' choices. Drawing on various examples, mostly from recent

European economic crises in the 2000s and 2010s, studies found that a national emergency along with the EMU (Economic and Monetary Union)'s tight fiscal/monetary framework promoted unilateral welfare cuts to aim at swift macroeconomic rebalancing (Angelaki and Carrera 2015). Here, governments were openly risk-taking in their endeavors to secure urgently-anticipated policy changes. Spread in crisis perception and rhetoric also helped governments legitimize their swift responses (Kuipers 2006; Vis 2010).

Existing studies have compiled extensive evidence to corroborate these diverse causal accounts. However, their analyses have rather focused on limited aspects of the whole causal configurations at work. Unsurprisingly, none of the above-cited works have presented and tested an exhaustive set of multiple, conjunctural conditions that would affect governments' choices over unilateralism and corporatist bargaining. Such a limited scope of causal analysis may also suggest that the empirical findings are potentially vulnerable to mis-specification errors, where omission of relevant causal conditions leads to biased evaluation of the conditions under investigation. The present study addresses this challenge by considering additional relevant conditions in comprehensive causal equations.

The empirical focus will be placed on the reform cases from Southern Europe. As already discussed in the introductory section, these Southern European cases provide a solid ground for hypothesis testing by facilitating wider variation in the outcomes of interest. However, such an empirical advantage comes with a cost since it limits the generalizability of analysis. Namely, among the four causal conditions thus far identified as relevant to determining the governments' choices (i.e., the strength of welfare beneficiaries, the strength of the sitting governments, consensus from welfare beneficiaries, and macroeconomic crisis),

Southern Europe provides an empirical context where only the last three are allowed to vary. The strength of welfare beneficiaries is rather controlled to be constant (i.e., strong) all across the cases (Ebbinghaus and Visser 2000; Visser 2016). Given this empirical constraint, the present study only examines how the variations in the other three conditions affect governments' choices over unilateralism and corporatist bargaining. Future studies may conduct a broader empirical analysis in the general European context to allow for full variations in all relevant causal conditions.

Table 1: Joint Causal Conditions for Government Unilateralism and Corporatist Social Bargaining

Outcomes	Causal Conditions	
	Existing Studies	New Specifications
Government Unilateralism	Strong Government	Strong Government & Absence of Consensus from Welfare Beneficiaries
	Economic Crisis	Economic Crisis & Absence of Consensus from Welfare Beneficiaries
Corporatist Social Bargaining	Weak Government & Consensus from Welfare Beneficiaries	Weak Government & Consensus from Welfare Beneficiaries & Absence of Economic Crisis

Bearing this context in mind, the author revisits existing accounts of government unilateralism, asking if strong governments and economic crisis—the two important causal conditions thus far identified—would continue to produce their own effects in comprehensive equations, or if they would remain significant but only as parts of broader joint causation. The expectation is that

the latter is true. As specified with Table1, the policy preferences held by welfare beneficiaries are particularly important here. If the beneficiaries support the pension reform, even those governments with strong political power or macroeconomic emergency would consider corporatist negotiation as a feasible pathway to strike a deal for a consensual reform. It is therefore only when welfare beneficiaries are unsupportive of the reform initiative and thereby make corporatist negotiation a difficult task, that the governments would certainly find unilateralism to be the only available pathway to pension cuts.

Turning next to the case of corporatist social bargaining, existing studies have claimed that weak governments and consensus from welfare beneficiaries constitute the core combinatory condition for such reform path (Avdagic 2010; Baccaro and Simoni 2008; Hamann and Kelly 2011). The author adds another interacting condition, the absence of economic crisis, to a broader joint hypothesis. As much as the presence of macroeconomic emergency facilitates unilateralism, its absence facilitates corporatist bargaining by allowing governments to be free of a macroeconomic pressure toward swift response to their economy. It is therefore when weak governments and consensus from welfare beneficiaries are joined by the absence of macroeconomic crisis that the incumbents would be sufficiently motivated toward corporatist bargaining for pension cuts.

### III. Cases and Research Method

The following empirical analysis examines the validity of these conjunctural hypotheses, using public pension reform cases drawn from four Southern European countries. These countries were known for their pension-heavy welfare programs.



While tax-based welfare benefits such as universal assistance and public services were still underdeveloped, generous public insurance programs indeed helped male bread-winners sustain their traditional families against the risk of retirement. Considering the large share of informal and small-sized economic sectors in the Southern European economy, most benefits were directed to labor market insiders who could pay contributions without interruption of job tenure (Carrera et al. 2010; Ferrera 1996; Karamessini 2008; Mari-Klose & Moreno-Fuentes 2013).

Table 2: Conditions for Pension Reform in Southern Europe

Years	Countries	The Aged (% of Total Population) <sup>1</sup>	Public Pension Spending (% of GDP) <sup>2</sup>	Public debt (% of GDP) <sup>3</sup>
1990-2000	Southern Europe <sup>4</sup>	15.6	9.3	79.4
	OECD <sup>5</sup>	14.0	6.8	61.9
2001-2010	Southern Europe	18.0	11.7	82.6
	OECD	15.4	7.5	62.0
2011-2015	Southern Europe	19.8	14.4	129.2
	OECD	17.2	8.5	84.8

1. Population aged 65 and over (Source: OECD Online Database <https://stats.oecd.org/>)
2. Gross Public Expenditure on Old Age and Survivors (Source: OECD Online Database <https://stats.oecd.org/>)
3. General Government Gross Debt (Source: IMF Online Database. [https://www.imf.org/external/datamapper/GGXWDG\\_NGDP@WEO/OEMDC/ADVEC/WEOWORLD](https://www.imf.org/external/datamapper/GGXWDG_NGDP@WEO/OEMDC/ADVEC/WEOWORLD))
4. Four Countries: Greece, Italy, Portugal, Spain
5. 24 Countries: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, the UK, the US.

Entering the 1990s, the public pension programs in Southern Europe began facing serious pressures for change. Ageing population in combination of high public debt added further fiscal loads to the already mature pension programs. As Table 2 shows, the sizes of aged population, pension spending, and public

debt were all higher than the OECD averages throughout the past decades. These figures were also growing consistently across the time periods. Even in the 2011-2015 period, when the Southern European countries faced extraordinary macroeconomic contraction and a burst of huge public debt due to the Euro zone crisis, demographic ageing and pension spending continued to hold their trends.

Under these circumstances, governments found it very challenging to continue their generous pension commitment. True, the timing of major pension overhaul differed across the countries. Italy and Spain started earlier in the 1990s, whereas Greece and Portugal did later in the 2000s and 2010s. The speed of the reform was also different, where Greece presented more rapid, abrupt changes than the other three countries which promoted rather gradual, multi-phased alternatives (Angelaki and Carrera 2015; ASISP 2009b; Chulia 2009; Chulia and Asensio 2009; Ferrera and Gualmini 2004). Beyond these differences, however, all governments have introduced a series of efforts to improve fiscal substantiality of their pension programs over the last past decades.

Table 3 presents a full list of these cases. A total of 24 cases were collected from the early 1990s, when pension cuts emerged as a serious reform issue in these countries, until the early 2010s when well-established data were publicly available for investigating recent pension reforms. More detailed descriptions of the cases and data sources are provided with the Appendix.

Table 3: Recent Cases of Public Pension Retrenchment in Southern Europe

Italy		Spain		Portugal		Greece	
ID	Cases	ID	Cases	ID	Cases	ID	Cases
1	Amato reform in 1992	7,8	Gonzales reform and Aznar reform in 1995-1997	13	Cavaco Silva reform in 1993	18	Mitsotakis reform in 1990
2	Dini reform in 1995	9	Aznar reform in 2001	14	Gueterres reform in 2000-2001	19	Mitsotakis reform in 1992
3	Prodi reform in 1997	10	Zapatero reform in 2006-2007	15	Socrates reform in 2007	20	Simitis reform in 1997-1999
4	Berlusconi reform in 2001-2004	11	Zapatero reform in 2008-2011	16	Socrates reform in 2010	21	Simitis reform in 2001-2002
5	Berlusconi reform in 2009-2010	12	Rajoy reform in 2012-2013	17	Passos Coelho reform in 2012-2013	22	Karamanlis reform in 2008
6	Monti reform in 2011-2012					23	Papandreuou reform in 2010
						24	Papademos reform in 2012

The author utilizes fsQCA to assess these reform cases. FsQCA is designed for a cross-case analysis where the number of cases is greater than a small-N but smaller than a large-N (Ragin 2000, 2008). Unlike quantitative regression analysis, QCA understands the nature of causality to be fundamentally configurational, providing causal accounts in terms of necessary and sufficient conditions (Ragin 2008, 17-23). FsQCA also allows researchers to examine conjunctural causation, where a group of causes-rather than their individual absence or presence-produces jointly sufficient conditions for an outcome (Ragin 2008). Small-N analysis is generally less an efficient way to address this type of causality due to the limited number of observations. Quantitative regression analysis may provide a better tool by introducing multiple interaction terms in a regression model; however, it is less effective than QCA for a study with a medium-N sample.

FsQCA runs with the following procedure. It first presents calibration for all causal conditions and outcomes. Compared with the conventional crisp QCA, which depends on binary coding (0 or 1), fsQCA allows ‘fuzzy’ membership scores between these categorical scores. Fuzzy sets thus provide a bridge in between quantitative and qualitative approaches to measurement of social phenomena, whereby full membership (coded 1) and full non-membership (coded 0) represent qualitative states (Ragin, 2000). Between these two states are varying degrees of fuzzy membership, ranging from ‘more out than in but not fully out’ (coded 0.25 in this study) to ‘more in than out but not fully in’ (coded 0.75). Cases with uncertain membership are given a score of 0.5 to represent maximum uncertainty. The author assigns all these membership scores resting on subjective judgment with reference to available case studies and other qualitative or quantitative data, as reported in the Appendix.

With these fine-grained fuzzy data at hand, FsQCA proceeds to individual necessity and sufficiency tests for the causal conditions under examination (Schneider and Wagemann 2010 pp.404-405). The analysis relies on certain quantified measures, called consistency and coverage scores (Ragin 2006). A consistency score introduces a probabilistic approach to fsQCA by assessing the degree to which an outcome actually falls within the fuzzy membership scores as expected by the causal conditions, thereby showing relative significance of given logical relationships. Following the lead of established studies, the author sets 0.9 as the threshold for logical necessity (Schneider and Wagemann 2012, 139-144) and 0.8 as the threshold for sufficiency (Ragin 2008, 48-49). Meanwhile, a coverage score evaluates goodness of fit for the relationships under investigation, focusing on the degree to which the causal conditions account for real cases in the sample. Unlike the case of the consistency score discussed above, no statistical thresholds are associated with the coverage score. It is rather a descriptive measure of empirical relevance, similar to the coefficient of determination ( $R^2$ ) in regression analysis. Therefore, in order to assess the coverage of a given condition or combination of conditions, it must first be consistent.

Following this preliminary analysis, fsQCA examines joint sufficiency of causal conditions whose combinations may explain occurrence (or non-occurrence) of the outcome. The analysis starts with the 'truth table' which displays actual patterns where certain causal combinations are linked to the outcome. It then eliminates any causal combinations that do not have real empirical references or, even if so, fail to satisfy the relevant consistency threshold for probabilistic relevance. In this study, the threshold is set at 0.85 (higher than the normal 0.8) following the lead of existing studies that recommend a stricter threshold for macro-level

data (Ragin 2008, 136). FsQCA then moves to the final procedure where it produces more parsimonious expressions of relevant causal relationships. Boolean algebra plays a crucial role in eliminating any redundant logical combinations (Ragin 2000, 2008). Upon the condition that the finalized combinations (called solutions) satisfy the consistency threshold (set at 0.85), relevant descriptive information-such as coverage scores and the lists of actual cases that exhibit such associations-are reported.

At this stage, standard fsQCA presents three different models for assessing the effects of the causal combinations on the outcome (Ragin 2008, 160-172). A complex model produces results based on empirical data as they exist. Because real cases may not exhaust all possible combinations of the causal conditions, this model tends to produce more complex solutions than otherwise would do in a more comprehensive sample. To fill in missing empirical configurations, Ragin proposes two alternative models that employ varying degrees of counterfactual analysis. Depending on whether the reasoning process is readily acceptable or needs more demanding justification, he presents an intermediate model that is linked to moderately succinct solutions, or a parsimonious model linked to the most succinct solutions. Among these three models, Ragin recommends researchers to adopt the intermediate model to strike a balance between the complexity and the parsimony. Accumulation of more knowledge and theory will lead us to more succinct solutions.

## IV. Empirical Analysis and Findings

### 1. Calibration

This study examines two outcomes of interest: Government Unilateralism (GU) and Corporatist Social Bargaining (CSB). Since GU and CSB present the opposite concepts, actual calibration will be conducted only for GU. Converse calibration scores will be used for CSB. A full membership score for GU indicates that governments promote reforms unilaterally with little effort toward social negotiation. A full non-membership score indicates that governments engage in a fully institutionalized process of negotiation, where they interact with welfare beneficiaries on a regular basis in a formal setting of concertation, without imposing unilateral reform agenda during the negotiation. An uncertain membership score (0.5) indicates that governments actively seek to combine negotiation and unilateralism, thereby placing the case in a conceptually grey category. In between these anchors, two partial scores (0.25, 0.75) are assigned depending on governments' reliance on negotiation or unilateralism. Table 4 summarizes the calibration criteria for GU discussed so far.

Table 4: Fuzzy-set Calibration Rules for the Outcome

Names	Scores	Descriptions
Government Unilateralism (GU)	1	Fully government-driven process with little effort towards negotiation with welfare beneficiaries
	0.75	Mostly government-driven process with minor efforts toward negotiation with welfare beneficiaries
	0.5	Combination of negotiation and unilateral government intervention; not clear whether the process was driven by negotiation, unilateralism, or both
	0.25	Mostly institutionalized negotiation with welfare beneficiaries, with minor effort towards unilateral intervention
	0	Fully institutionalized negotiation with welfare beneficiaries, with little effort towards unilateral intervention



Table 5: Fuzzy-set Calibration Rules for the Causal Conditions

Names	Scores	Descriptions
Economic Crisis (ECONCRISIS)	1	Occurrence of nationwide macroeconomic emergency, such as the Eurozone crisis in recent years
	0	No occurrence of such a massive shock
Strong Government (STRONGGOV)	1	Majority position without internal cleavage, either facing little objection or receiving divided responses from parliamentary opposition.
	0.75	Majority position without internal cleavage, facing full objection from parliamentary opposition.
	0.5	Minority position, or majority position with internal cleavage, facing little objection from parliamentary opposition
	0.25	Minority position, or majority position with internal cleavage, receiving divided responses from parliamentary opposition
	0	Minority position, or majority position with internal cleavage, facing full objection from parliamentary opposition.
Consensus from Welfare beneficiaries (CONSENSUS)	1	Major trade unions fully support the reform
	0.75	Major trade unions support main parts of the reform while opposing minor parts
	0.5	Trade unions fail to exhibit clear preferences over the reform
	0.25	Major trade unions oppose main parts of the reform; major trade unions present divided preferences over the reform
	0	Major trade unions fully oppose the reform
Right Government (RIGHTGOV)	1	Far right government
	0.75	Center-right government
	0.5	Centrist, grand coalition, or caretaker government
	0.25	Center-left government
	0	Far left government

This section also presents calibration for four causal conditions-three main conditions and one alternative condition-that are hypothesized to affect governments' choices over the reform paths. Economic Crisis (ECONCRISIS) evaluates whether governments face an emergency in their macroeconomic management. A full membership score means that this is indeed true. For all other cases, the score is 0. This simple binary calibration is justified because relevant studies (Angelaki and Carrera 2015; Kuipers 2006; Vis 2010) have presented this hypothesis in a context of deep rather than moderate national crises, highlighting an extraordinary nature of the macroeconomic pressure that governments face under EU (European Union) and EMU frameworks. To appreciate this theoretical interest, the calibration for ECONCRISIS will focus on the occurrence of nationwide macro-cyclic shock whose scale would be equivalent to the Eurozone crisis during recent years.

The annual growth of GDP, which includes all aggregate values produced for a given domestic economy, provides a good reference for assessing the overall macroeconomic condition under examination. According to the OECD online database(<https://stats.oecd.org/>, accessed on 2020.01.10), during the years of 2009–2013 when the Eurozone crisis was at its peak, the average GDP growth rates for the four Southern European countries were all below -1.5%: -5.9% for Greece, -1.6% for Italy and Portugal, and -1.8% for Spain. No comparable scale of macro-cyclic disruption was reported during the previous periods dating back to the 1990s. On this ground, any cases in which pension reforms occurred during those years of the crisis will be given a full membership score of 1. All other cases will receive a zero score.

One exception is the Italian pension reform in 1992 (Case 1). Although the quantitative scale of macroeconomic disruption was not as great as that of the

recent crisis (the GDP growth during the 1992–3 period was still around -0.5%), its coincidence with the Lira crisis further dampened the Italian economy by threatening the country's membership in the European Monetary System (EMS) and the emerging EMU. Because the participation in the European monetary project was widely perceived as the only feasible way to save the Italian economy that had been troubled for decades with inflations, unemployment, and the lack of international competitiveness, the economic crisis produced massive shock waves enough to alarm politicians and citizens for national fallout. Several rebalancing measures were introduced for wages, inflation, deficit, and welfare spending. The 1992 pension reform was one of these emergency measures (Perez 2002).

Strong Government (STRONGGOV), the second causal condition, deals with the political power that sitting governments possess when they promote welfare retrenchment. Here the cabinets' parliamentary position provides a general clue, which can be assessed with the seat share of the governing parties (or coalitions) in the parliament. Alternatively, governments can draw the power by relying on indirect support from the parliament. As shown by technocratic governments in Italy (Ferrera and Jessoula 2009), cabinets with no direct seats in the parliament can still enjoy a broad advantage as long as major parties stand by policy agreements that they have made to produce the caretaker governments.

Since STRONGGOV refers to the degree of governments' control over the reform agenda, one should also carefully consider a possibility that any governments who enjoy a majority position (either directly or indirectly) can face particular weakness with the policy issue that they wish to promote. Important here is if there are internal divisions among the incumbents as to the policy and how the parliamentary opposition responds to it. Intra-government

divisions are evaluated by looking at any incidence of major public disputes that are displayed among governing factions or parties. The shape of parliamentary opposition can be evaluated from full objection (i.e., united challenge from the parliamentary opposition) to little objection (i.e., little mobilized challenge or full support from the opposition). In between, partial cases may exist wherein governments receive diverse, divided responses from the opposition. For instance, certain segments of the opposition may raise explicit voices against the reform, while others remain relatively silent. Alternatively, opposition parties may express all different ideas along with varying combinations of support and objection.

Bearing all these calibration issues in mind, a full membership for STRONGGOV is assigned when governments have support from a parliamentary majority without internal cleavages. They also face little objection or receive divided responses from the parliamentary opposition. Full non-membership indicates that governments have completely lost their control over the reform issue. This happens when governments with a minority position (or a majority position with internal cleavages) face full objection from the parliamentary opposition. Uncertain membership indicates that governments maintain a minority position (or a majority with internal cleavages) but face only little objection from the parliament-which makes it unclear whether or not the governments maintain control over their reform agenda. Other partial scores are assigned depending on varying configurations of the cabinets' parliamentary position, internal divisions, and the shape of the opposition.

Again, the Italian reform case in 1992 (Case 1) warrants particular attention due to its unique story with the government's political power. On top of the Lira crisis that placed the Italian economy into a chaos, the centrist coalition

led by PM Amato was suffering from multiple claims on political corruption and clientelism. While his cabinet maintained a majority position in the parliament, the ensuing investigation led by “clean hands” turned the cabinet into political weakness by damaging its core public reputation (Ferrera and Jessoula 2009, 431-4; Jessoula and Alti 2010, 166-7). Reflective of this political situation, the author assigns the case a partial membership score of 0.25-which is one level higher than the state of total loss of control.

The third causal condition, Consensus from Welfare Beneficiaries (CONSENSUS), addresses the level of consensus among welfare beneficiaries towards welfare reform. Considering that pension beneficiaries in mature welfare states are represented mostly by trade unions, the author focuses on policy preferences exhibited by major trade union organizations. These organizations are identified by referring to experts’ qualitative assessments, on a condition that the unions are official participants to cross-sectoral collective bargaining and policy pacts (Ebbinghaus and Visser 2000; Visser 2016). A full membership score is given when they fully support governments’ reform plans. A full non-membership score is given when they are all opposed to the plans. An uncertain membership score indicates that the unions fail to exhibit clear preferences, thereby making it difficult to evaluate their approach toward the reform plans. Finally, partial (non)membership scores are assigned depending on the unions’ preferences over major vs. minor elements in the proposed reform plans.

The author also considers a potential omitted variable called Right Government (RIGHTGOV) that may affect governments’ choices over the reform paths. Although it is widely accepted that welfare retrenchment has cut across the traditional left-right cleavage in Europe (Huber and Stephens 2001; Ross 2000), it still remains plausible that right governments may promote

pension cuts by taking a more unilateral approach because of their tensions with trade unions, whereas left governments may take a more corporatist approach due to their affinity to them. To address this claim by using fsQCA, the causal condition first needs to be subject to fuzzy-set calibration. Depending on how much governments are skewed toward the right end of the ideological spectrum, the membership scores are assigned from 1 for far-right governments to 0 for far-left governments. Table 5 summarizes the calibration criteria for all four causal conditions discussed so far. Table 6 presents the numerical results covering all the causal conditions and outcomes (see the Appendix for qualitative justification for each of the 24 cases, as well as their data sources).

Table 6: Summary of the Fuzzy-set Calibration for the Causal Conditions and Outcomes

Case	Causal Conditions				Outcomes	
	ECONCRISIS	STRONGGOV	CONSENSUS	RIGHTGOV	GU	CSB
Italy1	1	0.25	0.25	0.5	0.5	0.5
Italy2	0	0.25	1	0.5	0	1
Italy3	0	0.25	1	0.25	0	1
Italy4	0	0.25	0	0.75	0.5	0.5
Italy5	1	1	0.25	0.75	0.75	0.25
Italy6	1	1	0.25	0.5	1	0
Spain7	0	0.5	1	0.25	0	1
Spain8	0	0.5	1	0.75	0	1
Spain9	0	0.75	0.25	0.75	0.5	0.5
Spain10	0	0.25	1	0.25	0	1
Spain11	1	0.25	0.25	0.25	0.5	0.5
Spain12	1	0.75	0	0.75	1	0
Portugal13	0	1	0	0.25	1	0
Portugal14	0	0.25	0.75	0.25	0	1
Portugal15	0	0.75	0.25	0.25	0.75	0.25
Portugal16	1	0.25	0	0.25	1	0

Portugal17	1	1	0	0.75	1	0
Greece18	0	0.75	0.25	0.75	0.75	0.25
Greece19	0	0.25	0.25	0.75	0.5	0.5
Greece20	0	0.25	0	0.25	0.5	0.5
Greece21	0	0.25	0	0.25	0.5	0.5
Greece22	0	0.75	0	0.75	0.75	0.25
Greece23	1	0.75	0	0.25	1	0
Greece24	1	0.5	0	0.5	1	0



## 2. The fsQCA Results

This section presents the results of fsQCA, beginning with the individual tests of necessity and sufficiency for the main causal conditions. The names of causal conditions in upper-case letters indicate that their presence is associated with the outcomes, whereas the names in lower-case letters mean that their absence is associated with the outcomes. As Table 7 reports, Economic Crisis and Strong Government are associated with GU as sufficient conditions, along with the consistency scores being greater than or equal to 0.8. These results seem to concur with the existing wisdom that the two causal conditions promote government unilateralism, although it is not yet clear if these conditions maintain truly independent effects or affect the final outcome as parts of broader joint causation. Also notice that the absence of Consensus from Welfare Beneficiaries is associated with GU as both necessary and sufficient conditions-which raises a possibility that another unspecified route to GU may exist. Meanwhile, the result with CSB is far less impressive. Of the twelve cases of individual association tested, only the presence of Consensus from Welfare Beneficiaries was associated with CSB as a sufficient condition. It is again unclear at this stage if this condition carries an independent effect by itself.

Table 7: Results of Individual Tests for Necessity and Sufficiency

Outcomes	Causal Conditions*	Necessity		Sufficiency	
		Consistency Scores**	Coverage Scores	Consistency Scores**	Coverage Scores
GU	ECONCRISIS	0.57	0.86	<b>0.86</b>	0.57
	econcrisis	0.43	0.38	0.38	0.43
	STRONGGOV	0.76	0.80	0.80	0.76
	stronggov	0.43	0.51	0.51	0.43
	CONSENSUS	0.15	0.26	0.26	0.15
	consensus	<b>0.98</b>	0.82	0.82	0.98
CSB	ECONCRISIS	0.12	0.14	0.14	0.12
	econcrisis	0.88	0.62	0.62	0.88
	STRONGGOV	0.48	0.39	0.39	0.48
	stronggov	0.76	0.71	0.71	0.76
	CONSENSUS	0.71	0.97	0.97	0.71
	consensus	0.45	0.29	0.29	0.45

\* The names in UPPER CASE mean the presence of the conditions, and the names in lower case mean the absence of the conditions.

\*\* The scores with bold fonts indicate that they satisfy consistency thresholds.

Turning to joint sufficiency tests, Table 8 presents the fuzzy-set truth tables for the two outcomes under examination. With GU, five of the eight logically possible associations present relevant empirical references, although only three of them have consistency scores higher than 0.85. For CSB, the same screening procedure lead to only one empirical association with probabilistic significance: 'econcrisis\* stronggov\* CONSENSUS.'

Table 8: The Fuzzy-set Truth Tables for the Causal Conditions and Outcomes

Outcome	Combinatory Causal Conditions			Number of Cases	Consistency Score	Relevance
	ECONCRISIS	STRONGGOV	CONSENSUS			
GU	1	1	0	5	1.00	Yes
	0	1	0	5	0.90	Yes
	1	0	0	3	0.85	Yes
	0	0	0	4	0.71	No
	0	0	1	4	0.20	No
	1	1	1	0		
	1	0	1	0		
	0	1	1	0		
CSB	0	0	1	4	1	Yes
	0	0	0	4	0.76	No
	0	1	0	5	0.48	No
	1	0	0	3	0.31	No
	1	1	0	5	0.14	No
	1	1	1	0		
	1	0	1	0		
	0	1	1	0		

Table 9: Results of Fuzzy-set QCA for the Causal Conditions and Outcomes

Model 1: GU			
Solutions	Consistency Score	Coverage Score	Cases in Solution
ECONCRISIS*consensus	0.94	0.56	Italy1, Italy5, Italy6, Spain11, Spain12, Portugal16, Portugal17, Greece23, Greece24
STRONGGOV*consensus	0.95	0.74	Italy5, Italy6, Spain9, Spain12, Portugal13, Portugal15, Portugal17, Greece18, Greece22, Greece23
	Solution Consistency: 0.92		
	Solution Coverage: 0.91		
Model 2: CSB			
Solutions	Consistency Score	Coverage Score	Cases in Solution
econcrisis*stronggov*CONSENSUS	1.00	0.48	Italy2, Italy3, Spain10, Portugal14
	Solution Consistency: 1.00		
	Solution Coverage: 0.48		

Table 9 carries these results to the Boolean analysis where the final set of solutions is identified for each outcome. While the analysis is drawn from the intermediate model, the complex and parsimonious models also produce the identical results (not reported here). First, Model 1 produces two Boolean solutions for GU-‘ECONCRISIS\*consensus’ and ‘STRONGGOV\*consensus’-out of the three significant empirical associations provided by the truth table. Each solution features the absence of Consensus from Welfare Beneficiaries as a joint condition, supporting our conjunctural hypothesis that strong governments or economic crisis would produce a sufficient condition for unilateralism as parts of broad causation joined by welfare beneficiaries who are unsupportive of the reform agenda. Both solutions have consistency scores higher than 0.85 along with the coverage scores of 0.56 and 0.74, respectively. They also cover 9 to 10 actual cases out of 24. Overall, the model presents a composite consistency score as high as 0.92 along with a coverage score of 0.91.

Models 2 presents a more straightforward result with one unique solution for CSB. Because the truth table has identified one empirical association, it is not surprising that the Boolean algebra produces the same association as the final solution. As Model 2 confirms, it is when the absence of Economic Crisis and Strong Government and the presence of Consensus are put all together that these conditions produce a sufficient effect for CSB. This suggests that the existing hypothesis on the combinatory effect of weak governments and consensus with welfare beneficiaries needs to be further contextualized to appreciate the interacting role by national economic condition.

### 3. Robustness Checks for the fsQCA Findings

Table 10 performs additional QCAs to enhance the robustness of the findings so far. First, it addresses potential calibration errors that fsQCA may involve, especially when it comes to assigning non-categorical membership scores (Skaaning 2011). The upper section of Table 10 checks with the robustness of the original outcomes by retesting the same hypotheses against an alternative dataset. Here all cases with partial scores are either reassigned to full (non)membership scores or dropped out from the sample in order to produce a crisp binary dataset. The score of 0.75 is replaced with 1.00, the score of 0.25 is replaced with 0, and the cases with uncertain membership (0.5) are simply dropped. The result confirms that the tests with this alternative dataset produce similarly significant results as the original ones. In addition, following the lead of Skaaning (2011), the author also conducts an additional robustness test by lowering the consistency threshold for logical sufficiency for joint sufficiency tests. With an alternative threshold set at 0.8 rather than 0.85, fsQCA still produces the identical outcomes as reported in Tables 8 and 9. All these results suggest that the hypothesized combinatory causation remains resilient against potential calibration errors.

Table 10: Additional Robustness Tests

Tests with Alternative Measurement Scores	Outcome	The Causal Conditions Tested	With the Original Fuzzy-Set Scores		With Crisp-Set Scores		
			Consistency Score	Coverage Score	Consistency Score	Coverage Score	
	GU	ECONCRISIS* consensus	0.94	0.56	1.00	0.59	
		STRONGGOV* consensus	0.95	0.74	0.97	0.73	
CSB	econcrisis*stronggov* CONSENSUS	1.00	0.48	0.89	0.67		
Tests with Alternative Causal Conditions	Outcome	The Original Specifications			Alternative Specifications		
		The Causal Conditions Tested	Consistency Score	Coverage Score	The Causal Conditions Tested	Consistency Score	Coverage Score
	GU	ECONCRISIS* consensus	0.94	0.56	ECONCRISIS*consensus*RIGHTGOV	1.00	0.33
					ECONCRISIS*consensus*rightgov	0.94	0.31
		STRONGGOV* consensus	0.95	0.74	STRONGGOV*consensus*RIGHTGOV	0.94	0.57
					STRONGGOV*consensus*rightgov	0.96	0.48
	CSB	econcrisis*stronggov* CONSENSUS	1.00	0.48	econcrisis*stronggov*CONSENSUS*RIG HTGOV	1.00	0.29
					econcrisis*stronggov*CONSENSUS* rightgov	1.00	0.43



The author also conducts additional fsQCA with alternative causal specifications, which involve a potential omitted condition, Right Government. First, the analysis tests if this new condition produces any significant effects at the individual level. The answer is negative. The presence of Right Government produces only insignificant consistency scores for GU and CSB: 0.74 and 0.52 for the sufficient condition and 0.63 and 0.57 for the necessary condition. The absence of this condition also produces similar results: 0.64 and 0.60 for the sufficient condition and 0.59 and 0.71 for the necessary condition. The lower section of Table 10 also presents the results of joint sufficiency tests involving this partisan condition with other original conditions. It confirms that none of the newly specified models that include either ‘RIGHTGOV’ or ‘rightgov’ produce better results than the original ones. The consistency scores exhibit only little fluctuations, whereas the coverage scores are all worse. This suggests that newly-specified models involving the potentially omitted variable do not improve the explanatory power of the original models.

## V. Conclusion

This study presents systematic evidence to multiple, conjunctural hypotheses that account for governments’ choices over diverse paths to welfare reform. Examining 24 pension reform cases drawn from Greece, Italy, Portugal, and Spain from the 1990s to the 2010s, it demonstrates that existing hypotheses need to be further contextualized to represent broader joint causation at work. It finds that, rather than the individual presence of strong governments and economic crisis, their interaction with another relevant condition—the absence of consensus

from welfare beneficiaries-produces sufficient conditions for government unilateralism. Similarly, the combination of weak governments and consensus with welfare beneficiaries is not yet sufficient for corporatist bargaining, unless joined by the absence of economic crisis. The author confirms the validity of these hypotheses, using an innovative research method-called fsQCA-that presents an analytic bridge between large-N quantitative analysis and small-N qualitative analysis. Additional robustness tests make the results even more credible by addressing a series of potential measurement and mis-specification errors.

The findings of this study highlight differential effects that causal conditions carry in the courses of welfare reform. As much as government power produces differential effects on the outcome of unilateralism vs. corporatist bargaining (as existing studies have already found), so do welfare beneficiaries' policy preferences and economic crises. Namely, while the support from welfare beneficiaries facilitates corporatist bargaining as a part of broad joint causation, the lack of such support will contribute to unilateralism as a part of another joint causation. While economic crises jointly facilitate unilateralism, their absence will do so for corporatist bargaining.

This study has identified these comprehensive sets of interacting conditions that affect governments' choices over the diverse reform paths. One may further advance the research agenda by exploring what make differences in the shapes of the causal conditions. For instance, there will be a multiplicity of economic, social, political, and institutional factors that affect the political strength of sitting governments over the reform agenda, as well as welfare beneficiaries' responses to it. Broad studies of European political economy have already hinted a potential list of such causes, including electoral realignment of party politics,

the structure and strength of labor movement, political and institutional veto points, the structure of existing welfare policy, the legacy of corporatist concertation, to name a few (Baccaro and Simoni 2008; Bonoli and Natali 2012; Carrera et al. 2010; Hamann and Kelly 2011; Huber and Stephens 2001). Future studies may build on these existing knowledge to pursue a more advanced research question.

Lastly, the fuzzy-set approach that the author endorses may also initiate another research agenda, by indicating a rather complicated path to welfare retrenchment in Europe. While most studies have examined governments' efforts to welfare cuts through the dichotomous framework of unilateralism vs. corporatist bargaining (cf. Natali and Rhodes (2004a, 2008)), our data suggest that the real world of welfare reform may present more nuanced and multi-faceted cases than conventionally expected. For instance, Italy<sup>1</sup>, Italy<sup>4</sup>, Spain<sup>9</sup>, Spain<sup>11</sup>, Greece<sup>19</sup>, Greece<sup>20</sup>, and Greece<sup>21</sup> from the sample indicate distinctively complex reform cases, where governments actively combine negotiation with unilateralism in order to promote their reform agenda. Similar occasions of complexity have also been documented in other pension reforms of Europe, albeit implicitly, including Austria in 1997 (Schludi 2005), Germany in 2001 (Schludi 2005), and France in 1993 and 2003 (Natali and Rhodes 2004a). Rather than disregarding as marginal uncertain cases, one may explore these understudied cases as representing a qualitatively distinctive path to hybrid reform. Pursuing this line of research will help expanding our knowledge to embrace more varieties of welfare reform.

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## Appendix: Descriptions and data sources for 24 pension reform cases in Southern Europe

Case	Year	Main Outcomes	Economic Crisis	Government Partisanship and Political Strength	Consensus from Trade Unions	References
Italy1	1992	A series of unstable negotiation with trade unions, interrupted with government unilateral measures and also followed by united long-lasting social mobilization.	Yes	Amato's centrist government. Majority position in the parliament, but facing major political challenge in public reputation due to corruption scandals and the ensuing investigation led by 'clean hands.'	Three major unions (CGIL, CISL, and UIL) opposed main parts of cost-saving measures, including increasing contribution periods and retirement ages, extending the reference period for pension payments, and introducing a supplementary defined-contribution tier in the pension system.	Ferrera and Gualmini pp. 109-10; Ferrera and Jessoula 2009 pp.431-4; Jessoula and Alti 2010 pp.166-7
Italy2	1995	Corporatist social bargaining. An institutionalized process of negotiation between the government and trade unions.	No	Dini's technocratic caretaker government. Minority position based on the support from social democratic PDS, Greens, centrist PPI, and center-right LN. It faced divided responses from the parliamentary opposition: while Forza Italia provided conditional support, communist RC and ex-fascist AN expressed their opposition.	All three unions supported the government's reform plan.	Ferrera and Gualmini 2004, pp.111-3; Jessoula and Alti 2010 pp.167-9; Ignazi 1996 pp. 393-8; Schludi 2005 116-8.
Italy3	1997	Corporatist social bargaining. An institutionalized process	No	Prodi's center-left government. Minority government which nonetheless	All three unions supported the government's reform plan.	Ferrera and Gualmini 2004 pp.114-7; Schludi

		of negotiation between the government and trade unions.		established a political majority by drawing support from communist RC outside the cabinet. On the pension issue, however, the government held only a minority position. It also faced divided opposition, where RC was conditionally supportive but Forza Italia, LN, and AN were explicitly critical.		2005 pp.118-20
Italy4	2001-2004	A combination of government unilateral measures and negotiation with trade unions, followed by united long-lasting social mobilization.	No	Berlusconi's center-right government. Majority position, although being internally divided on the reform issue among Forza Italia, LN, AN, and Christian democratic CCD-CDU.' The government also faced divided opposition where the centrist, center-left, and far-left parties raised all different voices.	All three unions fully opposed the government's reform plan.	Ferrera and Jessoula 2009, pp.443-5; Ignazi 2002 pp.992-3, Jessoula and Alti 2010 pp.174-5; Natali and Rhodes 2004b pp.175-8
Italy5	2009-2010	Unilateralism. Government-sponsored unilateral legislation with minor efforts toward negotiation with trade unions.	Yes	Berlusconi's center-right government. Majority position, facing divided opposition where the centrist, center-left, and far-left parties raised different voices.	All three unions opposed the main parts of the government's reform plan, which aimed at extending the retirement age.	ASISP 2009a pp.14-5; EuroWork 2010a; Ignazi 2009 pp.998-102.



Italy	6	2011-2012	Unilateralism. Government-sponsored legislation, with little effort toward negotiation with trade unions.	Yes	Monti's technocratic government with full parliamentary support for the reform, except for small leftist IdV and rightest LN.	All three unions opposed the main parts of the government's reform plan, which included increasing retirement ages, tightening pension payments, and speeding up the transition to the NDC system.	ASISP 2012 pp. 10-1; Culpepper 2014 pp.1272-3; EuroWork 2012a; Ignazi 2012 pp.165-6; Schoyen and Stamati 2013 pp. 93-5
Spain	7, 8	1995-1997	Corporatist social bargaining. An institutionalized process of negotiation between the government and trade unions, from the Toledo Pact (case 7) to the final legislation of the Pact (case 8).	No	From Gonzales' center-left (case 7) to Aznar's center-right government (case 8). Minority position, relying on conditional support from small nationalist parties, including CiU. Both governments faced little objection from the parliamentary opposition.	Two major unions, CCOO and UGT, supported the government's reform plan.	Chulia 2009 pp.534-41; Delgado and Nieto 1995 pp. 473-6, 1997 pp.489-94.
Spain	9	2001	An unstable process of negotiation with trade unions, interrupted by government unilateral measures and also followed by divided or intermittent social mobilization.	No	Aznar's center-right government. Majority position in the parliament, facing full objection from the parliamentary opposition against the reform.	Trade unions were divided over the government reform plan to incentivize people to work longer, increase some benefits, and separate financial resources between contribution-based benefits and tax-based benefits. CCOO supported the reform, while UGT opposed it.	Chulia 2009 pp.541-2; Delgado and Nieto 2001 pp.413-20; EurWork 2000a, 2001a, 2001b, 2001c
Spain	10	2006-2007	Corporatist social bargaining. An institutionalized process	No	Zapatero's center-left government. Minority position, facing divided	Both unions supported the government's reform plan.	Delgado and Nieto 2005 pp.1188-91, 2008

	of negotiation between the government and trade unions.		opposition on the reform where only the conservative PP raised a clear voice of objection.		p.1140; EurWork 2008a; Natali and Stamati 2014, p.321
Spain11011	An unstable process of negotiation with trade unions, interrupted by government unilateral measures and followed by united long-lasting social mobilization led by trade unions.	Yes	Zapatero's center-left government. Minority position, facing divided opposition on the reform. While nationalist parties (including CiU) all abstained, the conservative PP and other small left-wing parties opposed the reform bill for different reasons.	Both unions opposed the main parts of the government's reform plan, which aimed at longer work, longer contribution periods, and payment cuts.	Delgado and Nieto 2009 pp.1114-7; EurWork 2009, 2010b, 2010c, 2011a; Natali and Stamati 2014 p.322
Spain12013	Unilateralism A series of royal decrees, with little effort toward negotiation with trade unions.	Yes	Rajoy's center-right government. Majority position, facing full parliamentary opposition against the reform.	Both unions fully opposed the government's reform plan.	ASISP 2013 pp.7-8; Delgado and Nieto 2012 pp.297-302, 2014 pp. 288-90; EurWork 2013a, 2013b; Natali and Stamati 2014 pp.322-3
Portuga113	Unilateralism. A government decree, with little effort toward negotiation with trade unions.	No	Cavaco Silva's center-right government. Majority position, facing little parliamentary opposition.	Two major unions, CGTP and UGT, fully opposed the government's reform plan.	Barreto and Naumann 1998 pp.409-11; Chulia and Asensio 2009 pp. 619, 641-2; Magone 2000 p.531
Portuga2000-2	Corporatist social bargaining.	No	Gueterres's center-left government.	Overall, both unions supported the main	Chulia and Asensio 2009

114	001	An institutionalized process of negotiation between the government and trade unions.	Minority position in the parliament, facing divided opposition on the reform. Center-right CDS-PP, liberal PDS, left-wing PCP and BE presented all different reform bills.	parts of the government's reform bill, including a new calculation formula for pension payments, although they were critical of other parts of the reform including a plan to facilitate private pension plans.	p.645-7; EurWork 2000, 2001d; 2001e; Magone 2001 pp.396-7
Portuga 115	2007	Unilateralism. A series of government-sponsored legislation with minor effortsNo for negotiation with trade unions.	Socrates' center-left government. Majority position, facing full objection to the reform bill from the parliamentary opposition.	Trade unions were divided over the government's reform plan, with CGTP supporting and UGT opposing it.	ASISP 2009b pp.6-7; EurWork 2007a, 2007b, 2007c; Magone 2006 pp.1247-51, 2007 p.1079, 2008 pp.1108-9.
Portuga 116	2010	Unilateralism. Pension cuts announced with a government budget plan, which was approved by the Yes parliament with little effort toward negotiation with trade unions.	Socrates' center-left government. Minority position, facing divided opposition. While PSD supported the reform plan, PCP, BE, CDS-PP opposed it.	Both unions fully opposed the government's reform plan.	EurWork 2010d, 2010e; Magone 2011, pp.1104-5; Zartaloudis 2014 p.441
Portuga 117	2012-2 013	Unilateralism. Pension cuts announced with a government budget plan, Yes which was approved by the parliament with little effort	Passos Coelho's center-right government. Majority position, facing divided opposition. While PCP and BE objected the reform plan, social democratic PS abstained or took an	Both unions fully opposed the government's reform plan.	EurWork 2011b, 2012b, 2013c; Magone 2012 pp.264-7, 2013 pp.189-92, 2014 pp.259-63.

		toward negotiation with trade unions.	ambivalent stance.	
Greece 18	1990	Unilateralism. Government-sponsored legislation with minor efforts toward negotiation with trade unions.	Mitsotakis' center-right government. Majority position, facing full parliamentary opposition.	Trade unions were divided over the government's reform plan. GSEE supported the main parts of the reform, such as cutbacks on public-sector pension benefits, after they launched a series of mass mobilization. ADEDY, however, remained relatively silent. EIRR 1990a p.25, 1990b p.7-8; Kritsantonis 1998 p.519; Triantafillou 2009 pp. 123-30.
Greece 19	1992	The government's position alternating between negotiation and unilateralism, followed by divided or intermittent social mobilization by trade unions. No	Mitsotakis' center-right government. Majority position, but with internal division on the reform issue. Namely, a group of MPs – under the leadership of Foreign minister A. Samaras – publicly threatened to leave the ruling ND over the pension reform. The government also faced full objection from the parliamentary opposition.	Trade unions were divided over the government's reform plan. While ADEDY was fully opposed, GSEE took an ambivalent stance. Namely, GSEE initially joined ADEDY in mass mobilization, but later its leadership stroke a deal with the government, which was later rejected by its members. EIRR 1991 pp.5-6, 1992a pp. 8-9, 1992b pp.8, 1992c p.7; Kritsantonis 1998 p.519; Triantafillou 2009 pp. 131-35.
Greece 20	1997-1999	An unstable process of negotiation with trade unions, interrupted with government unilateral measures and also followed No	Simitis' center-left government. Majority position but with an internal division regarding the reform among high-ranking government officials, such as ministers, under-secretary, and	Both unions fully opposed the government's reform plan. EurWork 1997, 1999; Triantafillou 2009 pp. 135-7.

		by major long-lasting social mobilization.	government spokesman. The government faced divided opposition: namely, far left parties made clear voices against the reform, while the center-right ND remained silent.	
Greece 21	2001-2002	The government's position alternating between negotiation and unilateralism, followed by united long-lasting social mobilization.	No	<p>Simitis' center-left government. Majority position but with an internal division regarding the reform among high-ranking government officials including ministers and other party leaderships. Meanwhile, the government faced divided opposition: radical left parties raised clear voices against the reform, while the ND took an ambivalent approach.</p> <p>Both unions fully opposed the government's reform plan.</p> <p>EurWork 2001f; Matsaganis 2007 pp.548-9; Mavrogordatos 2002 p.966; Triantafyllou 2009 pp. 137-40</p>
Greece 22	2008	Unilateralism. Government-sponsored legislation with minor efforts toward negotiation with trade unions.	No	<p>Karamanlis' center-right government. Majority position, but facing full objection from the parliamentary opposition.</p> <p>Both unions fully opposed the government's reform plan.</p> <p>EurWork 2007d, 2008b, 2008c, 2008d; Mavrogordatos 2008 p.993-997, 2009 p.969; Natali and Stamati 2014 p.316</p>
Greece 23	2010	Unilateralism. Government-sponsored	Yes	<p>Papandreou's center-left government. Majority position, but facing full</p> <p>Both unions fully opposed the government's reform plan.</p> <p>Angelaki and Carrera 2015 pp.389-90;</p>

		legislation with little effort for negotiation with trade unions.	objection from the parliamentary opposition.	EurWork 2010f, 2010g, 2010h; Mavrogordatos 2011 pp.985-6
Greece 24	2012	Unilateralism. Government-sponsored legislation with little effort for negotiation with trade unions. Yes	Papademos' grand coalition government, supported by social democratic PASOK, ND, and populist right-wing LAOS. Majority position in the parliament, but with internal divisions on the reform. Namely, LAOS Both unions fully opposed the government's 2012c, 2012d; Mavrogordatos and Mylonas 2012 pp.126-8; Mylonas 2013 pp.87-88	
			voted against the reform bill, along with reform plan. 43 MPs from ND and PASOK. Meanwhile, the parliamentary opposition was little or no meaningful because only small radical left parties were outside the grand coalition.	

## 남유럽의 공적연금 개혁: 정부일방주의와 조합주의 사회교섭의 경로 연구

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유럽의 복지개혁에 관한 기존 연구들은 복지축소의 주요 경로를 정부일방주의와 조합주의 사회교섭의 관점에서 이해해왔다. 하지만 이 연구들은 해당 경로들을 둘러싼 복잡한 인과관계를 포괄적으로 설명하는 데에는 한계를 보여 왔다. 본 연구는 이러한 인과관계를 보다 체계적으로 규명하기 위해 일련의 복합가설을 제시하고, 이를 남유럽 4개국 (이탈리아, 스페인, 포르투갈, 그리스)의 공적연금개혁의 사례를 통해 검증하고자 한다. 1990년대부터 2010년대까지 발생한 총 24건의 개혁 사례를 퍼지셋 정성비교연구(fsQCA) 방법론을 이용하여 분석한다.

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주제어 | 복지개혁, 공적연금, 정부일방주의, 조합주의 사회교섭, 남유럽, 퍼지셋 정성비교연구 (fsQCA)