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# There is power in a union? Union members' preferences and the conditional effect of labour unions on left parties in different welfare state programmes

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## Abstract

This article studies the effect of labour unions on policy-making in six different parts of the welfare state (passive and active labour market policy, employment protection, old-age pensions, health care and education) in OECD countries after 1980 with a two-level strategy: At the micro-level, we investigate union members' preferences. Ordered logit regression analyses indicate that union members favour generous social policies more strongly than non-members. Moreover, this effect is stronger for programmes closely related to the labour market than for programmes without a strong labour market link. At the macro-level, we investigate the conditional effect of unions on left parties expecting the former to push the left towards more generous labour market-related (but not towards less-labour market-related) programmes. Regression analyses essentially provide evidence for such a relationship. Overall, unions have been powerful in promoting their members' social policy preferences via left parties in government but their power is recently vanishing.

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## 1 | INTRODUCTION

For a long time, labour unions and left parties have been found to be natural allies when it comes to the promotion of working-class interests (see, e.g. Korpi, 1983; Stephens, 1979). However, they do not act at the same level of representation. Unions as intermediary organizations are often understood as the major linkage between the welfare state preferences of (organized) workers at the micro-level and the social policy-making of left parties in government at the macro-level. This article aims at an empirical evaluation of this mechanism in times of tremendously declining union membership. In investigating this relationship, we answer the following research questions: What exactly are the welfare state preferences of union members and how effective are labour unions in pushing left parties<sup>1</sup> to be responsive to union members' interests in different parts of the welfare state?

What can we learn from existing literature? At the level of individual welfare state preferences, studies often include union membership but mostly only as a control variable. Quite consistently, union members favour more redistribution or higher aggregate social spending (e.g. Cusack et al., 2006; Finseraas, 2009; Häusermann et al., 2016; Iversen & Soskice, 2001; Kitschelt & Rehm, 2014; Mosimann & Pontusson, 2017; Rehm, 2009). Furthermore, they prefer more government intervention and higher spending on individual social policies (e.g. Busemeyer & Neimanns, 2017 for unemployment support and childcare; Engler & Zohlnhöfer, 2019 for industrial aid and market regulation; Gingrich & Ansell, 2012 for health care and unemployment support; Häusermann et al., 2016 for job creation). However, what this group of studies lacks is a systematical comparison of union members' preferences across various disaggregated welfare state programmes.

When it comes to the macro-level and unions' direct impact on policy-making, labour power mostly has a positive effect on unemployment benefits (e.g. Jensen, 2012a), active labour market policies and employment protection (e.g. Rueda, 2006 for both indicators). However, it has no impact on (or even negatively affects) old-age provision and health care spending (e.g. Jensen, 2012a). Regarding the conditional effect of labour unions on left parties, the literature is fairly thin: For aggregated data, some studies provide evidence for a positive conditional relationship (Hicks et al., 1989) or show that unions push left parties to globalization-induced welfare state expansion (Garrett, 1998; Kwon & Pontusson, 2010). For disaggregated data, existing empirical evidence is even thinner: Only recently, Swank (2020) shows that strong unions reinforce the left's positive effect on minimum income protection and active labour market policies, and Engler (2021) reports that labour power conditions left parties' reactions to globalization regarding unemployment benefits. Besides, Zohlnhöfer et al. (2013) provide evidence that in the 1990s, left parties have rather reduced pension generosity with increasing union density. Yet, the dependent variables being studied in the existing literature are not representative for the welfare state in general. Therefore, what the existing literature lacks is a theoretical elaboration and a simultaneous empirical test of the intermediary role of labour unions and their impact on left parties in government across several welfare state programmes.

This article aims at filling these gaps and contributes to the existing literature in a number of ways: Firstly, we study every step of the causal mechanism that runs from labour union members to social policy-making. This is, to the best of our knowledge, the first article that explicitly connects the macro-level (unions' effect on left parties' social policy-making) to its micro-foundations (union members' welfare state preferences). Secondly, we systematically compare various programmes. This allows drawing a broader picture than studying individual welfare state policies separately. To this end, leaning on Jensen's (2012a) categorization, we deduce and test theoretical expectations for both programmes that are close and programmes that are less close to the

labour market as well as both policies of income protection and policies of activation. Overall, our findings have more general implications regarding labour unions' role as intermediary organizations between workers' (and other employees') interests and left parties in government by learning whether unions are able to effectively push the left to satisfy their members' preferences.

We proceed as follows: In the next section, we discuss theoretically how the social policy preferences of union members should look like, why labour unions should care about their members' preferences and why left parties should be responsive to labour unions. Subsequently, we present a two-step empirical analysis. Firstly, we analyse the social policy preferences of union members. Secondly, we investigate the conditional effect of labour power on left parties in different welfare state programmes. The final section concludes.

## 2 | THEORY

Before outlining our theoretical arguments on union members' preferences and unions' impact on left parties' social policy-making, we discuss our choice of welfare state programmes. In order to distinguish between the wide range of programmes, we primarily lean on Jensen (2012a, b), who separates labour market-related from life course-related programmes without a strong link to the labour market. In addition, we further subdivide these categories and make use of the differentiation between income protection and activation measures (see, e.g. Häusermann, 2012). As we elaborate in the following, these dimensions allow deducing arguments on the social policy preferences of labour unions and their members. In order to paint a broad picture of welfare state policies, our study includes six programmes. With regard to labour market-related programmes, we investigate employment protection as well as passive and active labour market policies. Concerning less-labour market-related policies,<sup>2</sup> we look at old-age pensions, health care and education. This choice of programmes allows investigating a wide spectrum of welfare state areas and gives an idea of what kind of programmes union members exactly prefer and what unions should stand up for in their interaction with left parties.

While studying the relationship between labour unions, left parties and the welfare state at the macro-level is popular among scholars, connecting such cross-country analyses to their micro-foundations is largely unexplored. However, questions such as 'Which social policies do union members actually prefer?' and 'Why should left parties in government be responsive to the demands of labour unions at all?' are relevant questions that need to be addressed before investigating the interplay between labour power and left parties. To this end, we assume that unions have a certain self-interest: They are member-seeking and -maintaining and, thus, have to act in accordance with their (potential) members' preferences in order to claim credit for their implementation (see also Jensen, 2012a). Even if unions prefer more generous welfare state policies in general, they face a first trade-off where to employ their own scarce human resources as well as a second trade-off concerning the expansion of which programmes to demand from their left allies in government, who, in turn, have to deal with fiscal constraints. Hence, we expect unions to focus on those social policy fields that are of prior interest to their members, namely programmes that are related to their labour market status.

To be clear, unions are not necessarily unitary actors and union members may very well have different social policy preferences. On the one hand, for example, Arndt (2018) argues that the preferences of white-collar workers should differ from those of blue-collar workers (against vs. in favour of more redistribution and intervention) and, thus, there are different union federations representing these varying preferences resulting from differences in the composition of their

membership. Similarly, Nijhuis (2009, 2011) reports that the union structure affects its position towards social policy. On the other hand, we know that at least parts of the white-collar group (socio-cultural (semi-)professionals) tend to support redistribution (Kitschelt & Rehm, 2014) or share the same policy positions regarding cuts in public spending as blue-collar workers (Engler & Zohlnhöfer, 2019), and we know that union members – even when controlling for income or public employment – support more redistribution (e.g. Häusermann et al., 2016; Kitschelt & Rehm, 2014) and the generosity of programmes that rather target low-income groups, such as unemployment benefits or subsidies (Busemeyer & Neimanns, 2017; Gingrich & Ansell, 2012). Moreover, we argue that differences between the social policy preferences of blue- and white-collar union members may only exist for labour market-related programmes rather than for programmes that are not primarily labour market- but rather life course-related. While both groups should benefit from an expansion of the latter, the former particularly target the needs of the more vulnerable blue-collar workers (see also Svallfors, 2004). Furthermore, it is also possible that union membership comes along with the internalization of egalitarian norms – even among their white-collar, high-income members (Mosimann & Pontusson, 2017).

Turning to the question on union members' preferences, we fall back on the dimensions discussed before. This allows painting a more fine-grained picture than previous literature's finding that union members generally demand for more generous social policies (e.g. Busemeyer & Neimanns, 2017; Gingrich & Ansell, 2012): We argue that union members (compared to non-members) prefer those social policy programmes that are the closest to their organizational affiliation.<sup>3</sup> As unions particularly operate in labour market-related policy fields, we expect their members to have strong preferences regarding passive as well as active labour market policy and regarding employment protection legislation. Conversely, the impact of union membership should be rather small when it comes to not primarily labour market- but rather life course-related policies, expecting such issues to be equally relevant for both members and non-members. However, when it comes to policies without a strong link to the labour market, we expect different logics for the three programmes under investigation, as it should be additionally relevant whether a measure aims at income protection or activation. The argument being that union members are interested in securing their economic status quo. Accordingly, we expect that those policies of this category that provide social security to individuals in need most directly and that ensure future benefits in the case of need are characterized by a stronger support of union members than activation programmes. This should be particularly the case for old-age pensions but also for health care. While the former provides future benefits in general and income protection in particular, the latter provides benefits in the case of need, too, but with no element of income protection.<sup>4</sup> In contrast, activation policies, such as education, provide no or rather few future benefits for union members, as most of them have completed their training periods in the past. Thus, their self-interest in encompassing education policies should be rather low. In sum, we expect union members to favour labour market-related programmes over less-labour market-related programmes with future benefits over less-labour market-related programmes without future benefits. Correspondingly, our micro-level hypothesis reads as follows: The effect of union membership is the strongest when it comes to passive and active labour market policy as well as employment protection and it is stronger for old-age pensions and (to a smaller extent) health care than for education.

Why and by whom should these preferences be translated into policies? Our argument builds on the strong link between the micro- and macro-level, namely individuals and their organization in labour unions on the one hand and left parties on the other hand. There is a broad literature on the disintegrating link between the working-class and the left, identifying two trends: First, the number of (both organized and non-organized) workers rapidly declines due to changes in

the economy and the occupational structure (e.g. Oesch, 2006). Second, the social structure of left parties' electorate has changed with the share of workers decreasing over the last decades (e.g. Kitschelt, 1999; Oesch & Rennwald, 2018). As a consequence, and assuming that left parties are primarily office-seeking because they can influence policies more effectively when being in office, they have to mobilize more than only their (former) core constituency. Accordingly, a priori, left parties might have an electoral incentive to implement those welfare state policies that not only address the needs of workers and other employees but that appeal to broad voter segments (see also Jensen, 2012a). Still, we expect the effect of left parties on social policies to be conditioned by workers' organizational representation for several reasons: Firstly, these two organizations have been found as natural allies, with the left representing the interests of workers and other employees for decades (e.g. Garrett, 1998; Korpi, 1983; Stephens, 1979). Secondly, union members have just until recently been more supportive (voters) of left parties (e.g. Arndt & Rennwald, 2016; see also Ramiro (2016) for the support of radical left parties). Hence, from a vote- and office-seeking perspective, it is electorally rewarding for the left to be responsive to unions' social policy claims even in times of socio-structural changes within their electorate. Thirdly, the literature also shows that strong unions push left parties to adopt more leftist policy positions (Pontusson & Rueda, 2010), and it is plausible to assume that, ultimately, these more leftist positions result in more leftist policies when the left is holding office.

Therefore, in accordance with our micro-level expectations and based on the assumption that labour unions transfer their members' preferences into the political arena,<sup>5</sup> we argue that the conditional effect of unions on left parties differs between labour market-related and not primarily labour market-related policies. For the former group of policies, we hypothesize that the effect of left parties increases with labour union power. This should hold true for passive and active labour market policy as well as for employment protection legislation. While some scholars argue that labour unions mostly represent labour market insiders (Rueda, 2005, 2006) and, hence, should particularly push for employment protection of regular contracts, others expect the representation of outsider interests to increase with union density (Becher & Pontusson, 2011; Martin & Swank, 2012; Swank, 2014), which should, in turn, rather result in a conditional effect of labour power on left parties when it comes to the employment protection of temporary contracts. Yet, we expect no substantial differences between these two categories of employment protection, arguing that, first and foremost, employment protection legislation is a regulatory policy.<sup>6</sup> Thus, the trade-off regarding invested resources is smaller than when it comes to (re-)distributive policies. Accordingly, in theory, employment protection can be improved for both regular and temporary contracts simultaneously. Conversely, we hypothesize that the effect of left parties is not conditioned by labour union power when it comes to less-labour market-related policies, as we expect such programmes to be of minor concern to union members. In addition, unions facing a trade-off where to employ their own resources should rather focus on policies that are most directly related to their organizational *raison d'être* than on policies that are less targeted on their members.

### 3 | MICRO-LEVEL ANALYSIS: UNION MEMBERS' SOCIAL POLICY PREFERENCES

#### 3.1 | Method and data

We test our micro-level hypothesis for 13 OECD countries<sup>7</sup> using all waves of the International Social Survey Programme's (ISSP) Role of Government data set. We use five waves, namely 1985, 1990, 1996, 2006 and 2016 (ISSP, 1986, 1992, 1999, 2008, 2018).

TABLE 1 Results of the pooled ordered logit regressions

	Passive labour market policy	Active labour market policy	Health care	Pension	Education
Union member	0.361*** (0.067)	0.247*** (0.026)	0.248*** (0.046)	0.181*** (0.051)	0.097** (0.042)
Sex	-0.162** (0.047)	-0.267*** (0.042)	-0.285*** (0.054)	-0.198*** (0.046)	-0.086** (0.039)
Age	0.004*** (0.001)	-0.000 (0.001)	0.002** (0.001)	0.008*** (0.003)	-0.001 (0.001)
Religion	-0.204*** (0.064)	-0.084 (0.063)	-0.196*** (0.033)	0.147*** (0.043)	-0.212*** (0.055)
Income	-0.240*** (0.031)	-0.271*** (0.027)	-0.158*** (0.033)	-0.219*** (0.029)	-0.012 (0.023)
Education	-0.092*** (0.032)	-0.176*** (0.025)	-0.081*** (0.028)	-0.197*** (0.030)	0.097*** (0.021)
Observations	34,743	34,508	35,418	35,003	35,217
Pseudo R <sup>2</sup>	0.061	0.061	0.049	0.047	0.036

Note: \* =  $p < 0.1$ ; \*\* =  $p < 0.05$ ; \*\*\* =  $p < 0.01$ ; standard errors clustered by country in parentheses; cut-off points, country dummies and wave dummies not reported.

As our investigation units are individuals, our dependent variables are their social policy preferences. More precisely, we use ISSP questions with five response categories asking whether the government should spend more or less for health care, pension, education and unemployment benefits. For easier interpretation, we re-code the categories originally ranging from 1 (spend much more) to 5 (spend much less) into 1 (spend much less) to 5 (spend much more). The most accurate indicator to operationalize active labour market policy is whether it is the government's responsibility to provide a job for everyone.<sup>8</sup> We also re-code the four categories of this indicator in a more intuitive way from 1 (definitely should not be) to 4 (definitely should be). Unfortunately, there are no data available regarding employment protection legislation preferences.

Our independent variable is an individual's present labour union membership operationalized as a dummy variable (1 = member; 0 = non-member).

We include several control variables. We control for age in years. Sex is added as a dummy-variable (1 = male; 0 = female). Education is measured by an individual's degree in several categories. We test for the effect of religiosity by adding a dummy variable with the value 0 if individuals do not attend any religious services and the value 1 if individuals do so. Additionally, we included a country-specific standardized (z-transformed) income variable.<sup>9</sup>

As our dependent variables are ordinal, we run pooled ordered logit regressions.<sup>10</sup> All models include country as well as wave dummies and robust standard errors clustered by country.

### 3.2 | Empirical results

What do the social policy preferences of union members actually look like? Table 1 shows the results of the pooled ordered logit regressions. Firstly, we have a closer look at the control variables, which either show the expected sign or do not reach statistical significance: Women more

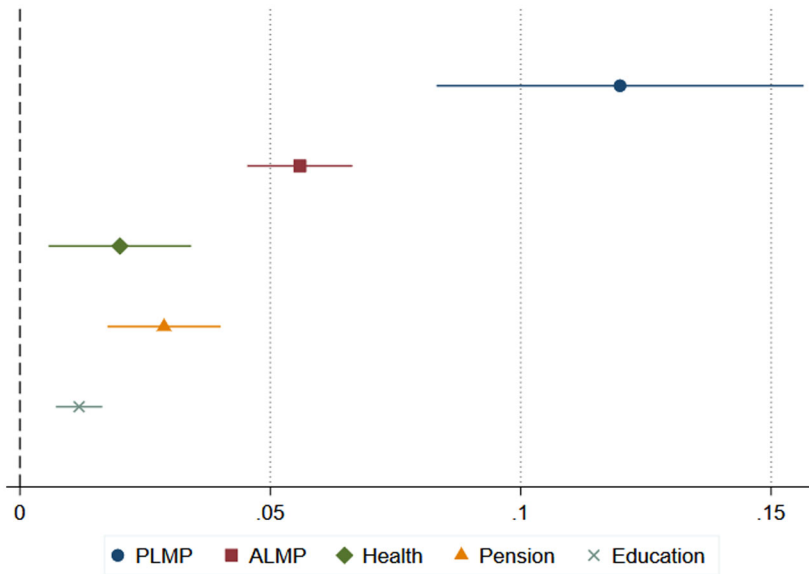
strongly support generous social policies, as they have a higher labour market vulnerability and a higher risk to become dependent on social security programmes (see also Häusermann et al., 2016). High income negatively affects preferences for more intervention as those individuals are more independent from the welfare state. The same holds true for a higher educational degree. Reversely, a higher age comes along with stronger welfare state preferences. In sum, these effects corroborate recent literature on preference formation, in which these findings are explained by self-interest as those people with lower educational degrees, lower income, higher age and women have a higher risk to become dependent on social programmes.

With regard to our main variable of interest, union membership has a statistically significant positive effect on individual preferences in all policy fields. Accordingly, union members favour generous social policies more strongly than non-members. These findings are perfectly in line with previous studies reporting that union membership affects individuals' preferences on unemployment support, job creation or health care (e.g. Busemeyer & Neimanns, 2017; Gingrich & Ansell, 2012; Häusermann et al., 2016).<sup>11</sup>

In order to investigate our micro-level hypothesis more explicitly, we check whether our expected order of preferences can be corroborated, that is the impact of union membership on programmes closely connected to the labour market is stronger than on less labour market-related programmes and that the effect on less-labour market-related programmes is stronger for those that provide future benefits than for those that do not. To this end, we estimate average marginal effects of union membership for binary logistic regression models. We dichotomize our dependent variables coding 1 for the categories 'spend more' and 'spend much more' and coding 0 for the categories 'spend less' and 'spend much less' for the indicators on passive labour market policy, health care, pensions and education. For the active labour market policy indicator, the response options 'probably should be' and 'definitely should be' are coded 1 and the options 'probably should not be' and 'definitely should not be' are coded 0. Accordingly, the number of observations drops substantially for most indicators, as we exclude the middle category ('spend the same'). We decided to exclude this category when focusing on differences between the various programmes for several reasons: Firstly, while all but one of the original dependent variables include a middle category, the original active labour market policy indicator does not. Thus, our coding decision leads to a better comparability between the programmes. Secondly, we argue theoretically that the middle category has no substantial claim for our analysis and should not shift partisan effects and unions' actions. Thirdly, we follow existing literature due to comparability (see, e.g. Häusermann et al., 2016), and fourthly, presenting average marginal effects from logistic regressions allows for an easier and more intuitive presentation.

Figure 1 shows the average marginal effects of union membership and their confidence intervals in different programmes. All coefficients are statistically significant, indicating that union membership enhances the chance to be in favour of more generous state intervention for all social programmes (for the regression results, see online appendix Table A2). However, the size of the average marginal effect differs substantially across programmes. Regarding passive labour market policy, union membership increases the chance to be in favour of more spending by about 12 percentage points, while for active labour market policy, it is increased by 6 percentage points. Conversely, the average marginal effect of union membership is much smaller for health care, pensions and education, ranging between 1 and 3 percentage points. Interestingly, the confidence intervals of active and passive labour market policy do not overlap, with the coefficient for passive labour market policy being significantly higher. This result indicates that union members focus on income replacement more than on activation, even in the field of labour market-related programmes. Furthermore, the confidence intervals of these two programmes do not overlap





**FIGURE 1** Marginal effect of union membership on individuals' social policy preferences  
[Colour figure can be viewed at [wileyonlinelibrary.com](http://wileyonlinelibrary.com)]

Note: The average marginal effects are taken from the regression results in Table A2 in the online appendix. The lines show the 95 per cent confidence intervals. Abbreviations: ALMP = active labour market policy; PLMP = passive labour market policy

with the programmes being not closely related to the labour market. This corroborates our micro-level hypothesis. Indeed, union membership has a stronger effect on active and passive labour market policies than on health care, pension and education. Moreover, results substantiate the hypothesized differences between the latter three programmes: Non-overlapping confidence intervals show that union membership has a significantly stronger effect on preferences for old-age pensions (future benefits and income protection) than on preferences for education (no future benefits and activation). In contrast, the confidence interval for health care preferences overlaps with the interval of pension and education, which perfectly reflects our line of reasoning that the income-protective element of this programme is much smaller than that of old-age pensions.

In sum, the order of preferences in Figure 1 fits perfectly with the existing literature: The median voter, indeed, has higher preferences for health care as the risk to become in need of that measure is not predictable. At the same time, health care and other life course-related programmes, such as education, for middle- and high-income earners are (almost) as popular as for low-income earners. Thus, the non-existing or less clear differentiation for life course-related programmes as well as the gap between these programmes and labour-market-related programmes reflects the theoretical arguments and the macro-level results in other studies, most notably Jensen (2012b).

As robustness checks, we specify several re-estimations (see online appendix Tables A3–A12). Firstly, we use a different measurement of religiosity (belonging to a religious group). We see that the effects remain the same and that religious respondents tend to ask for less generosity. Secondly, we additionally include partisan left-right orientation (scaled from 1 = far left to 5 = far right). Results remain almost the same but the positive effect for education misses conventional significance levels, which at least corroborates our theoretical expectations regarding the lower

importance of less-labour market-related policies without future benefits for union members. However, the partisan variable corroborates the theoretical expectation: Left voters are significantly more in favour of higher generosity than right voters. Thirdly, we focus on those individuals who are currently employed and use their belonging to a social class based on their job and educational level as indicator for the economic status (instead of income). To this end, we follow previous studies (Engler & Zohlnhöfer, 2019; Gingrich & Häusermann, 2015) that distinguish four social classes that are based on Oesch's (2006) classification of ISCO codes into several categories of work logics and skills. We find out that the effect of union membership on all five programmes can be corroborated. Fourthly, we include a dummy for those individuals who live together with children in one household ( $= 1$ ) and those who do not ( $= 0$ ), arguing that this could influence anticipated benefits for next generations. In line with this argumentation, we see that all results for union membership remain the same but the effect for education; in this case, the control variable for children is positive and statistically significant. Fifthly, we run ordered probit regressions for the main models. All results remain the same. Sixthly, we re-run our main models for the three latest ISSP waves 1996, 2006 and 2016 separately to assess the stability of our findings over time (ISSP, 1999, 2008, 2018). Across these sensitivity analyses, almost all of the main models' results remain the same and are stable over time. The only exception is that the statistical significance of union membership disappears for education in the 2006 wave. Again, this is in line with our expectation, as we do not expect labour union members to be strongly in favour of more education spending. Lastly, we study the role of union members' income status and class membership that might impact the effect of union membership on social policy preferences as well: Figure A1 in the online appendix shows the average marginal effect plots for the models that additionally include an interaction term for union membership and income. The confidence intervals do not cover '0', indicating that the positive effects of union membership do not vanish as the individual income rises. A similar picture emerges when it comes to the interaction of union membership and social classes: Middle-class membership does not significantly change the effect of union membership on all programmes under investigation here but pension (compared to working-class union members as reference group). This finding supports the argument put forward by Mosimann and Pontusson (2017), according to which socialization processes among union members result in a convergence of social policy preferences – regardless of an individual's wealth or class membership. All in all, the sensitivity analyses show that union membership has a robust statistically significant positive effect on individuals' preferences in all policy fields, which is stable over time.

## 4 | MACRO-LEVEL ANALYSIS: THE CONDITIONAL EFFECT OF UNIONS

### 4.1 | Method and data

Turning to the question, whether union members' preferences are translated into the political sphere, we test the conditional effect of labour unions on left parties' social policy-making for 21 OECD countries<sup>12</sup> between 1980/1985 and 2011/2013.<sup>13</sup> Following other studies (e.g. Garritzmann & Seng, 2016; Obinger et al., 2014; Schmitt & Zohlnhöfer, 2019), we use cabinets as unit of analysis, which has been found to be more appropriate when testing partisan effects on public policies (Schmitt, 2016). In doing so, we lean on Boix (1997: 483), who defines a cabinet as a government 'with the same party composition (even if there are new elections or the prime minister changes

but is of the same party). Yet, we count a new cabinet after an election, too, even when the party composition did not change. The first and the last year, in which a government is in office for 6 months or longer, are used as a cabinet's first and last year, respectively. We do not count cabinets that have been in office for less than 1 year.

For our dependent variables, we make use of seven indicators.<sup>14</sup> Following Esping-Andersen's (1990: 21) argument that it is 'difficult to imagine that anyone struggles for spending per se', we expect that unions are interested in more generous social benefits for their (potential) members rather than in mere spending. Accordingly, we study generosity indicators in all but one case. Regarding programmes that are less-labour market-related, we cover old-age pensions with replacement rate data. Health care, in contrast, is covered by total health care spending, which should follow different patterns than sick pay as a rather narrow generosity indicator. Education is operationalized with a standardized indicator relating public education spending to the share of population aged between 15 and 29 years. Regarding labour market-related programmes, passive labour market policy is covered by unemployment replacement rates, while spending on active labour market policies is standardized by unemployment. Lastly, we operationalize employment protection with the OECD's employment protection legislation indicators for regular and temporary contracts separately. We use changes between the last and the first year of a cabinet as dependent variables. For the purpose of easier interpretation of the regression results, we multiplied the indicators for active labour market policy, employment protection and education by 100.

Our main independent variable is measured by the cumulated cabinet seat shares of social democratic and socialist parties, while labour union power is covered by union density. In order to test our conditional argument, we construct multiplicative interaction terms between these indicators.

Regarding control variables, firstly, we test for globalization, unemployment, elderly population, economic growth and budget balance. Secondly, we consider a government's institutional constraints, and thirdly, we include EU membership. Lastly, we include a dummy for the financial crisis after 2008, the level of a dependent variable in a cabinet's first year and cabinet duration.

While the cabinet seat share of left parties is by definition constant during a cabinet, labour union strength and most of the controls are measured by their average within the first half of a cabinet's term – except for EU membership, the financial crisis dummy, the level of the dependent variable and cabinet duration. This allows avoiding endogeneity problems that would occur when using a variable's average for a cabinet's total term in office.

We employ cross-section OLS regression analyses and estimate robust standard errors clustered by country.

## 4.2 | Empirical results

Does labour union power condition left parties' effect on different parts of the welfare state? Before answering this question, we briefly present the control variables (Table 2): Firstly, globalization tends to induce retrenchment, particularly in those fields that are characterized by the strong opposition of capital owners, such as old-age provision. In addition, increased economic openness results in the dismantling of labour market regulation, with temporary contracts facing a reduction of their legal employment protection. Secondly, economic growth not only results in higher active labour market policy spending per unemployed but also in a decline of both pensions and unemployment benefits. The other socio-economic indicators have no consistent effect. Thirdly,

TABLE 2 Conditional effect of labour union power on left parties in different parts of the welfare state

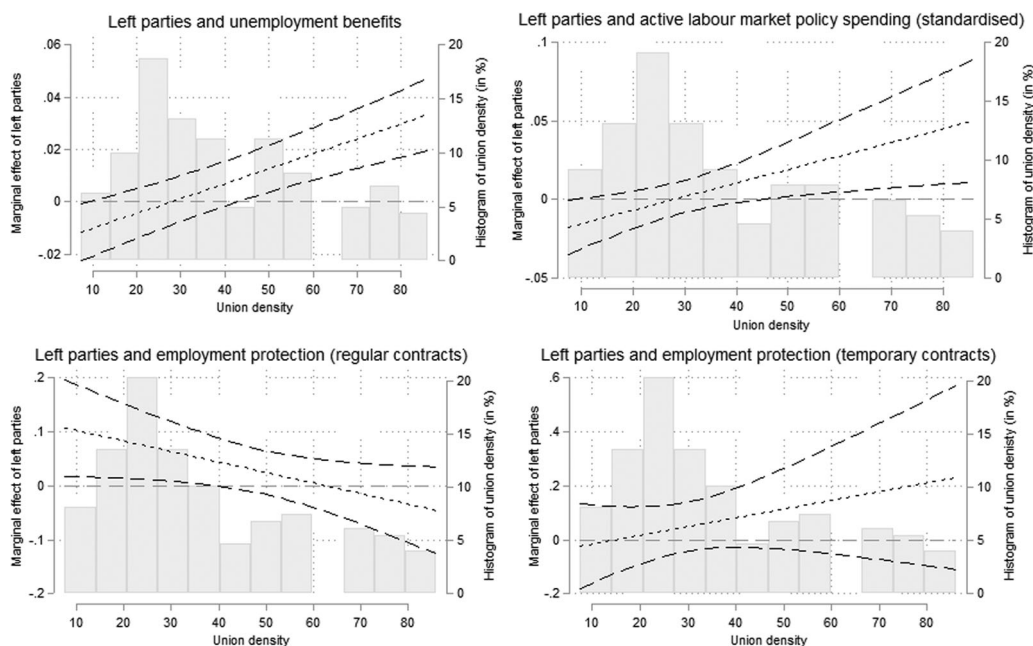
	Unemployment benefits	Active labour market policy	Employment protection (reg. contracts)	Employment protection (temp. contracts)	Pensions	Health care	Education
Left cabinet	-0.016 <sup>**</sup> (0.006)	-0.024 <sup>**</sup> (0.010)	0.122 <sup>**</sup> (0.049)	-0.048 (0.093)	0.047 <sup>**</sup> (0.017)	-0.136 (0.161)	0.703 (0.429)
Union density	-0.035 <sup>*</sup> (0.020)	-0.033 (0.020)	0.093 (0.069)	-0.321 (0.249)	0.065 <sup>**</sup> (0.023)	-0.685 <sup>**</sup> (0.187)	1.145 (0.883)
Left × union density	0.001 <sup>***</sup> (0.000)	0.001 <sup>**</sup> (0.000)	-0.002 <sup>**</sup> (0.001)	0.003 (0.003)	-0.001 <sup>***</sup> (0.000)	0.003 (0.003)	-0.004 (0.012)
Globalization	-0.027 (0.019)	-0.001 (0.022)	0.010 (0.059)	-0.263 <sup>*</sup> (0.139)	-0.033 <sup>**</sup> (0.015)	-0.006 (0.226)	0.934 (0.669)
Unemployment	-0.128 (0.086)	-0.022 (0.076)	-1.671 <sup>**</sup> (0.643)	-1.498 <sup>*</sup> (0.868)	-0.067 (0.073)	-2.974 <sup>**</sup> (0.780)	-2.884 (3.278)
Elderly	-0.101 (0.145)	-0.047 (0.145)	-0.236 (0.433)	-2.408 <sup>**</sup> (0.952)	-0.221 (0.147)	1.735 (1.974)	2.821 (4.147)
GDP growth	-0.316 <sup>**</sup> (0.151)	0.438 <sup>**</sup> (0.148)	0.426 (0.450)	0.864 (0.850)	-0.282 <sup>**</sup> (0.128)	0.267 (1.348)	-11.722 (8.849)
Budget	0.116 (0.083)	0.110 (0.073)	-0.309 <sup>*</sup> (0.161)	0.395 (0.646)	-0.034 (0.089)	0.915 (0.713)	0.199 (2.199)
Institutional constraints	-0.114 (0.166)	0.086 (0.173)	0.039 (0.653)	-2.667 <sup>**</sup> (1.214)	0.037 (0.178)	1.767 (1.907)	4.033 (5.782)
EU membership	1.452 <sup>*</sup> (0.835)	1.847 <sup>**</sup> (0.696)	4.386 (3.499)	7.541 (5.665)	0.396 (0.521)	14.344 <sup>*</sup> (7.513)	4.814 (20.892)
Financial crisis	0.332 (0.633)	0.213 (0.683)	-0.156 (2.720)	5.459 (5.483)	0.311 (0.682)	29.141 <sup>**</sup> (6.971)	-26.989 (26.095)

(Continues)

TABLE 2 (Continued)

	Unemployment benefits	Active labour market policy	Employment protection (reg. contracts)	Employment protection (temp. contracts)	Pensions	Health care	Education
Start value (depend. var.)	-0.074 <sup>***</sup>	-0.112 <sup>***</sup>	-0.039 <sup>**</sup>	-0.076 <sup>***</sup>	-0.027	-0.151 <sup>***</sup>	-0.165 <sup>***</sup>
Cabinet duration	(0.028)	(0.022)	(0.018)	(0.022)	(0.022)	(0.034)	(0.040)
	-0.091	-0.099	-0.513	-6.202	0.258	6.138	13.134
Constant	(0.340)	(0.326)	(1.391)	(4.124)	(0.317)	(3.590)	(12.218)
	10.025 <sup>***</sup>	1.231	14.468 <sup>**</sup>	99.089 <sup>***</sup>	4.288 <sup>*</sup>	87.239 <sup>***</sup>	114.058
Observations	(2.822)	(3.166)	(5.801)	(31.593)	(2.174)	(19.582)	(87.141)
	160	152	148	148	151	177	164
R <sup>2</sup>	0.168	0.209	0.194	0.239	0.231	0.300	0.160

Note: \* =  $p < 0.1$ ; \*\* =  $p < 0.05$ ; \*\*\* =  $p < 0.01$ ; robust standard errors clustered by country in parentheses.

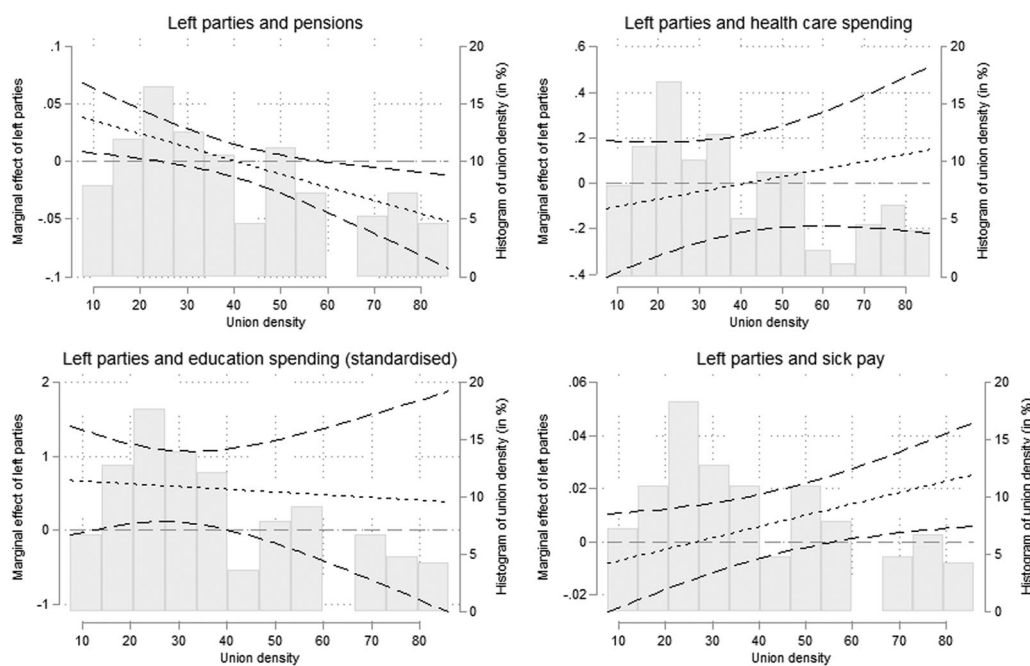


**FIGURE 2** Conditional effect of labour union power on left parties' social policy-making in labour market-related programmes

Notes: Marginal effect plots are based on respective models in Table 2. The dashed lines show the 95 per cent confidence intervals.

other factors have only limited impact. Interestingly, European Union membership unfolds no negative effect on regulatory (employment protection) or fiscally expensive (old-age provision) programmes, which is rather surprising considering that the EU is widely seen as a liberalization project (Scharpf, 1999). Lastly, our findings provide substantial evidence for beta-convergence. Cabinets with high starting levels cut significantly more (or expand less) than others.

Turning to our main variables of interest, the marginal effect plots in Figure 2 depict the results for the labour market-related programmes. These figures show the marginal effect of left parties at different levels of union density. As theoretically expected, the effect of left parties increases with the organizational power of labour unions in terms of unemployment benefits and (standardized) active labour market policy spending. For both programmes, the effect of left parties is positive and statistically significant when more than about 45 per cent of all employees are organized in unions, which is the case in about one third of the observations in the respective models. Conversely, the findings for the two employment protection indicators do not corroborate our macro-level hypothesis. Regarding temporary contracts, there is no conditional effect at all, while regarding regular contracts, left parties' positive effect even vanishes with increasing union density. This finding somewhat contradicts the claim of parts of the literature that unions primarily organize and represent the interests of labour market insiders with stable and long-term employment (e.g. Rueda, 2005, 2006) that should particularly demand employment protection for regular contracts. Conversely, the evidence provided here rather reflects the expectation that unions also promote outsider interests (such as generous unemployment benefits) as their organizational degree increases (see also Becher & Pontusson, 2011; Martin & Swank, 2012; Swank, 2014). Trying to shed some light on the negative conditional relationship between left parties and labour unions in the case of regular contracts, several arguments have already been put forward



**FIGURE 3** Conditional effect of labour union power on left parties' social policy-making in less-labour market-related programmes

Notes: Marginal effect plots are based on respective models in Table 2. The dashed lines show the 95 per cent confidence intervals.

by others: Firstly, left parties might only dare to liberalize social rights when they can share blame with strong unions (Zohlnhöfer et al., 2013). And secondly, left governments may be more likely to enforce employment protection liberalization even in the face of strong unions when promoting 'flexicurity', that is when simultaneously compensating unions and workers in general via more generous unemployment benefits (Simoni & Vlandas, 2021).

Turning to the marginal effect plots for the not primarily labour market-related policies in Figure 3, the findings largely corroborate our hypothesis as well. Health care and (standardized) education spending clearly correspond with the expectation that labour unions do not condition left parties in these programmes. However, old-age pensions play out differently, with the conditional effect being negative: Left parties reduce pension replacement rates when more than about 60 per cent of employees are unionized. While this result evidences that indeed unions do not push left parties towards more generous policies in fields other than labour market-related programmes, the negative effect may indicate that there is a fiscal trade-off, which unions (and left parties) are facing when demanding (and implementing) expansions of passive and active labour market policies. Alternatively, this finding might support the argument brought forward by Zohlnhöfer, Wolf and Wenzelburger (2013) that the left is willing to cut pension generosity but only if it is in a position to share the blame with strong unions. In addition, relating to the issue ownership literature (e.g. Ross, 2000) and a 'Nixon goes to China'-logic, it is left parties rather than other party families that should be able to cut pensions, particularly when facing strong unions.

Relating to our choice of indicator for health care policies, we re-run our main model for sick pay replacement rates as dependent variable, which provides interesting insights (see online appendix Table A27): While health care spending in general undoubtedly provides protection

against life course-related risks (Jensen, 2012a, b), sick pay follows a different pattern. Here, the conditional relationship between unions and left parties is positive with the left unfolding a positive effect on this programme at high levels of union density. This is not surprising given that sick pay protects wage earners' income and, in doing so, it is much closer to the needs of organized (and non-organized) workers. Accordingly, sick pay rather reflects the pattern of labour market-related policies.

Overall, the reported findings essentially corroborate our macro-level hypotheses: Labour unions, indeed, condition left parties' effect in particular parts of the welfare state, that is when it comes to labour market-related programmes but not when it comes to less-labour market-related programmes. To assess the sensitivity of these results, we run several robustness checks (see online appendix Tables A14–A24): Firstly, we change our labour power indicator in order to study whether unions condition left parties via mechanisms other than their organizational degree. To this end, we take Ghent systems, strike activity and the share of union members among left party voters into account. Concerning Ghent systems, it is possible to argue that unions should only be able to push left parties to provide generous labour market-related programmes when they are legally guaranteed administrative and decision-making powers in these areas. Concerning strike activity, one could argue that unions' willingness to promote their members' interests by striking affects left parties' policy-making, too. Concerning the share of union members among left party voters, we fell back on data from all ISSP waves and Eurobarometer. This indicator should relate our micro-level discussion more closely to the macro-level, expecting left parties to be the more responsive to the demands of unions and their members' preferences, the higher the share the latter make up among the left's electorate. Empirically, we can only substantiate expectations for Ghent systems and the micro-level indicator: Labour unions' access to (and responsibility for) the administration of welfare state programmes as well as the share of union members among left party voters are alternative mechanisms that allow unions and their members pushing left parties towards more generous labour market-related social policies. Secondly, we test whether our findings are robust when using a broader definition of left parties, additionally including the share of green cabinet members. Here, we expect that the conditional effect of labour unions on left parties is weaker because green parties should be less close (and, therefore, less responsive) to workers' organizations than parties of the 'old left'. Thirdly, we extend our main models by including additional controls: We take deindustrialization processes, the role of female labour force participation and Ghent systems into account. Fourthly, we control for country-specific effects by including country dummies, which is not implausible when analyzing several cabinets within each of the 21 countries. Fifthly, we re-estimate the main models for the smaller micro-level sample, which could be argued to be more appropriate when comparing the two steps of our empirical analysis. Sixthly, we re-run our main models for the more commonly used country-years as unit of observation. To this end, we specify time-series cross-country regression models with panel-corrected standard errors and both with and without country and year fixed effects. In sum, these sensitivity analyses support our main findings for both labour market-related and less-labour market-related programmes.

Finally, we split our sample in two sub-periods. Our findings show that the conditional effect of unions concerning labour market-related welfare state programmes has vanished over time: While labour unions were successful in pushing left parties to promote their members' main social policy preferences up until the mid-1990s, they seem to have lost this capacity ever since. Yet, this finding may not necessarily solely be related to the decrease in the number of union members over the past decades but could also be related to several other developments: Firstly, the tremendous changes in left parties' electorates with decreasing shares of working-class voters



(e.g. Gingrich & Häusermann, 2015; Oesch & Rennwald, 2018) might have negatively affected the left's responsiveness to workers' demands and shifted the left's attention towards other groups. Secondly, social democratic parties themselves have changed ideologically from supporting traditional social security instruments to promoting cross-class policy measures or even engaging in retrenchment reforms (e.g. Merkel et al., 2011). Lastly, recent socio-economic challenges, such as permanent austerity or globalization, limit the political actors' fiscal room for manoeuvre, which might have made it difficult for left parties to be responsive to unions' demands as well. What is more, concerning programmes that are not primarily related to the labour market, we find positive conditional effects in the post-1995 sub-period for health care and education spending. This evidence, in turn, might hint to changes in the social structure of unions' membership or to efforts of union leaderships seeking new members, especially middle- or high-income individuals that should demand these programmes rather than class-based issues, such as unemployment benefits.

## 5 | CONCLUSION

This study assessed the role of labour unions in different parts of the welfare state in advanced democracies, answering the two questions which social policies union members actually prefer and whether unions (still) effectively influence left parties in government. We did so by connecting the micro-level of individuals' preferences to the macro-level of governments' policy-making in several labour market-related programmes (passive and active labour market policy, and employment protection legislation) and less-labour market-related programmes (old-age pensions, health care and education).

Overall, our empirical analyses provide evidence for our theoretical arguments: At the micro-level, we show that union members have stronger preferences for more state interventions across all social policies under investigation than non-members. More specifically, we find that the effect of union membership is stronger for labour market-related programmes than for those that are not primarily labour market-related. Moreover, our findings provide evidence that union members prefer the increase of less-labour market-related programmes with future benefits (old-age pensions) over the increase of programmes without future benefits (education). For the macro-level, we can report that labour unions, indeed, condition left parties' social policy-making when it comes to labour market-related policies. At least regarding passive and active labour market measures, we find that strong unions push the left towards more generous policies. Yet, our analysis of sub-periods indicates that this conditional relationship has vanished in recent years. Conversely, labour power has largely no such effect when it comes to programmes that are less relevant for union members, especially health care and education.

These findings have several implications for our understanding of the political role of labour unions: Firstly, this article identifies important differences between welfare state programmes. Regarding individual-level preferences, it goes beyond previous research, which has reported in separate contributions that union membership affects some individual programmes. In contrast, our study not only corroborates that this holds true across major parts of the welfare state but that the degree of union members' social policy preferences actually varies between issues. Regarding the macro-level of governments' policy-making, we show that other studies' findings on the interplay between labour unions and left parties for aggregate social spending (e.g. Garrett, 1998; Hicks et al., 1989; Kwon & Pontusson, 2010) are essentially driven by labour market-related policy instruments and are not representative for all parts of the welfare state. Secondly, and more

generally, our results imply that labour unions have been powerful intermediary organizations and effective promoters of their members' interests by influencing their left allies in government in the past. However, our results for sub-periods indicate that their power is vanishing – even though our micro-level results show that individual preferences of union members are perfectly stable over time.

Finally, we put forward some subjects that still need to be addressed in more depth. Starting at the micro-level, further research should take a closer look at the possible reversed causality regarding social policy preferences and union membership. Analyses focusing on the temporal dimension and even in-depth interviews could shed light on the causal relationship. Second, the interplay between labour unions and left parties surely is not confined to the core of welfare state policies. At least with regard to economic policy instruments, we know that union members' support for industrial aid, market regulation or state ownership of enterprises is stronger than among non-members (Engler & Zohlnhöfer, 2019; Gingrich & Ansell, 2012). Hence, future research should go beyond the social policy-centred view that we took here by studying other policy fields. Third, recent decades were not only characterized by a substantial decline in union membership across almost all advanced democracies but also by tremendous changes in both left parties' electorates and the national and international socio-economic conditions. In addition, two changes are observed by Häusermann (2006): On the one hand, 'old' social risks are increasingly accompanied by 'new' social risks that change the policy outputs. On the other hand, this leads to changing alliances between unions and left parties regarding the expansion or retrenchment of the different policies. While it is well established that these developments affect left parties' social policy-making in general, we still know too little about their consequences for labour unions' capacity to push left parties effectively towards more generous policies.

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## DATA AVAILABILITY STATEMENT

Data that support the findings of this study are available upon request.

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## ENDNOTES

- <sup>1</sup> We conceptualize left parties as those parties that historically have strong ties to the labour movement, that is social democrats and socialists. Häusermann (2010) and others call this group of parties the 'old left' in contrast to the 'new left' that is much more libertarian and that is much less characterized by working-class voters, such as green parties.
- <sup>2</sup> Terms like 'less' or also 'not primarily' are rather simplistic and are used for convenience only. Of course, pension generosity usually depends on an individual's previous position in the labour market. Not least, programmes may

- be financed by taxes or social security contributions with the latter being relatively closer to both individuals' labour market position and labour market developments in general. Nonetheless, we argue that the social risks that pensions, health care and education address are rather life course-related (see also Jensen 2012a, b) and less closely related to the labour market than passive and active labour market policies or employment protection.
- <sup>3</sup> One could object that individuals should have certain social policy preferences before becoming union members and that these preferences are the reason for their membership in the first place (e.g. Checchi et al. 2010; Cusack et al. 2006). Yet, as others have shown (see, e.g. Ahlquist & Levi 2013; Kim & Margalit 2017; Pontusson & Rueda 2010), union membership itself transforms or at least sharpens individuals' preferences through socialization processes or the provision of information. We assess the possibility of reversed causality in more detail in the micro-level analysis.
  - <sup>4</sup> Of course, sick pay is an important but fiscally rather minor part of health care policies aiming at income protection of individuals being currently employed. Hence, this part of health care should rather follow the pattern of labour market-related programmes. We come back to this argument in our macro-level analysis.
  - <sup>5</sup> Of course, unions do not only function as 'transmission belts' (Jensen 2012a: 221) but also act in their own self-interests (see also Pontusson 2013: 799). However, our assumption is based on Jensen's argument (2012a: 221): Unions, and especially union leaders, are interested in gaining and maintaining members, as spoils are provided by a large membership, which is similar to the benefits of political parties when gaining office. To achieve this goal, unions fight effectively for their current and future members' preferences in the visible political arena. Additionally, unions failing to represent workers' interests may face decreasing membership and, in turn, lower organizational power resources. Empirically, previous studies have shown that union members not only favour redistribution (e.g. Häusermann et al. 2016; Kitschelt & Rehm 2014; Mosimann & Pontusson 2017) but that unions successfully represent these preferences in the political arena, especially up until the 1990s (Iversen & Soskice 2006; Pontusson 2013).
  - <sup>6</sup> Of course, employment protection includes (re)distributive elements, such as severance payments, too. However, relying on the OECD's (2019) Employment Protection Legislation indicators' dimensions, there are more regulatory elements included, such as notification procedures in the case of individual dismissal of a worker with a regular contract, delay involved before notice can start and a definition of unfair dismissal.
  - <sup>7</sup> Belgium, Denmark, Finland, France, Germany, Japan, New Zealand, Norway, Spain, Sweden, Switzerland, the United Kingdom and the United States. The exact sample of countries varies between the different Role of Government waves (see online appendix Tables A8, A9).
  - <sup>8</sup> Although this indicator is suboptimal, it is the most appropriate one in the Role of Government questionnaire for our research interest. We argue that the provision of a job includes offering training programmes and other active labour market policies in order to provide a job for everyone.
  - <sup>9</sup> Descriptive statistics for the independent variables are summarized in online appendix Table A25.
  - <sup>10</sup> We refrain from applying multi-level analyses because our small sample of countries could bias confidence intervals (see Stegmueller 2013 for details).
  - <sup>11</sup> We assess the possibility of reversed causality by running logistic regressions with union membership as dependent variable and social policy preferences as independent variable. Our findings suggest that we cannot rule out that causality is reversed (see online appendix Table A1), as preferences for more generous state interventions are statistically significant determinants of union membership. By far, however, this result is no unequivocal proof of reversed causality because there is no temporal dimension in our data that allows concluding that the social policy preferences antecede union membership.
  - <sup>12</sup> Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Japan, the Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, the United Kingdom and the United States. Aiming at the inclusion of the most comprehensive sample of established and advanced OECD democracies, this sample is larger than the micro-level sample. For reasons of comparability, we discuss the macro-level results for the sample of the micro-level in the robustness checks.
  - <sup>13</sup> The period of observation is limited due to data availability. The main models cover the longest possible periods for each indicator.
  - <sup>14</sup> Online appendix Table A13 provides more detailed variable descriptions and the data sources and Table A26 reports descriptive statistics.

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