# Ideas, Institutions and the Politics of Federalism and Territorial Redistribution

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## Introduction

In his seminal article, "Studying Public Policy," Richard Simeon (1976) assesses the political science literature on public policy then available, while also sketching a research agenda for the field. Key aspects of this research agenda include the need for analytical rather than normative analysis of policy processes, an emphasis on comparative rather than case study research and the need to improve explanatory policy analysis by systematically exploring the role of different factors. One of the factors Simeon discusses at length (570–73) is the potential causal impact of ideas. Simeon concludes that "Ideas seem to be essential both to the substance and to the means by which policies are made" (573). This was a prescient statement because the study of ideas was relatively marginal in the field of policy analysis at the time, as it was in social science research in general. However, much has been written about the role of ideas in politics and public policy since then and ideational explanations are increasingly considered a central element of political and policy analysis, alongside institutional, psychological and structural explanations (Parsons, 2007). Many ideational scholars have also combined the analysis of ideas with the study of institutions, claiming that one needs to look at both of these to explain policy stability and change (Campbell, 2004).

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In this article, we advance this research agenda by discussing the causal interaction of ideas and institutions as they intersect with another element of Simeon's 1976 research agenda: the "distributional impact of government programs" related to the broader political issue of "who gets what" (Simeon, 1976: 562). For Simeon, "expenditure programs" provide not only money but "symbolic and intangible benefits." For instance, "Even in a predominantly financial program like welfare, the means by which it is administrated may have a major effect on the sense of dignity and well-being of the recipient, and on either the feeling of outrage or of moral satisfaction on the part of the donors" (563). Simeon claims the politics of redistribution deserves close attention: "In Canada we need to focus especially on redistribution as it relates to the primary cleavages in the social structure —that is, the pattern of benefits and costs as they affect economic classes, regions, ethnic grounds, and industrial sectors" (565). The reference to "regions" is interesting because it points explicitly to the politics of territorial redistribution, which is particularly prominent in federal countries like Canada. Four years before publishing "Studying Public Policy," Simeon authored *Federal-Provincial Diplomacy*, one of the most influential books on federalism and public policy in Canada (1972).

Applying some of the insight of "Studying Public Policy" to the politics of federalism and territorial redistribution is particularly relevant in this symposium on the work of Richard Simeon. Our two cases, Canada and Belgium, are two federal states where the combination of territorial and language divisions have strongly shaped contemporary public policy. Although class cleavages have affected social policy development in both countries, the constituent units of the federations and the political parties linked to them (especially in Belgium), have been the key players in the politics of large programmes of territorial redistribution such as equalization and social security.[1]

Territorial redistribution, which we define in the context of this article as the transfer of resources across regions of a country, is always a potential source of conflict in multinational federal states. Nationalist and regionalist ideas, as well as the institutional environment, shape the politics of redistribution in these states (on how ideas can shape the way inequalities are considered, see Smith, 2013). However, such ideas do not always lead to intense political pressures to eliminate or decentralize programmes that operate territorial redistribution (equalization in Canada and social security in Belgium). This is the puzzle at the heart of this article. Our argument is that nationalist and regionalist ideas are necessary but not sufficient conditions for these programmes to be the subject of pressures that can lead to significant change in their territorial structuring or governance. The key institutional variable ultimately determining the potency of the pressures on such programmes is the party system.[2] A party system composed of purely regional parties such as Belgium's is much more likely to move

**Abstract.** Drawing on the work of Richard Simeon and using the cases of equalization in Canada and Belgium's social security system, this article shows how nationalist ideas combined with institutional management structures, government formation rules and the configuration of party systems to condition the territorial dynamics around these two programmes. In Canada, resentment against equalization in many provinces, often because it is perceived as accommodating Québécois nationalism, has translated only into moderate pressures on the programme because federal parties have largely stayed away from this divisive issue and federal executive discretion over the programme has meant that provinces cannot force change. In Belgium, pressures on social security have been more intense because the absence of pan-Belgian parties has given greater resonance to Flemish nationalist ideas within the political system.

**Résumé.** Cet article suit la recommandation mise de l'avant par Richard Simeon dans son article de 1976 intitulé "Studying Public Policy" en développant une explication idéationnelle et institutionnelle des pressions exercées sur les grands programmes de redistribution territoriale au Canada et en Belgique. En utilisant les cas de la péréquation au Canada et de la sécurité sociale en Belgique, l'article montre que les facteurs conditionnant les dynamiques territoriales autour de ces politiques sont les idées nationalistes, les règles concernant la formation des gouvernements et la structure des systèmes de partis. Au Canada, un ressentiment envers la péréquation existe dans certaines provinces en grande partie parce que le programme est perçu comme favorisant le Québec. Par contre, ce ressentiment ne s'est pas traduit par des pressions politiques intenses car les partis politiques fédéraux ne portent pas cette position et les provinces ne peuvent pas forcer une modification du programme. En Belgique, la pression sur la Sécurité Sociale issue du nationalisme flamand a une importance politique plus grande en raison de l'absence de partis politiques panbelges.

the idea of territorial redistribution to the federal policy agenda that one such as Canada's than rests on "pan-national" parties brokering between provincial and linguistic cleavages, among others. Overall, following Simeon (1976), this article explores how ideas and institutions interact to shape the politics of fiscal and social policy over territorial redistribution, which we understand as transfers of financial resources across constituent units.

This article is divided into four sections. In the first section, we explore the potential explanatory role of ideas and institutions in public policy, with a particular focus on how these two types of explanation might interact to produce certain policy outcomes. We then offer some considerations for understanding the politics of territorial redistribution in multinational countries through the lens of ideational and institutional analysis. In the third and fourth sections, we examine the debates over federal equalization policy in Canada and social security in Belgium, respectively. More specifically, the analysis shows how party institutions have filtered nationalist and regionalist ideas about these two programmes. The comparison generates insight about the politics of territorial redistribution in federal systems and about the relationship between ideas and institutions, two issues that Simeon (1976) rightly emphasized in "Studying Public Policy."

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## Ideas and Institutions

Since Simeon's article was published, the literature on ideas and public policy has expanded dramatically, especially since the early to mid-1990s.[3] One of the central claims of this literature is that ideas are not mere epiphenomena but can exert a direct impact on policy processes and outcomes (Campbell, 2004). Over the years, what has become clear is that ideas matter. What recent literature on ideas does is to explore *how* ideas matter (for example, Jacobs, 2009; Mehta, 2011). Based on the ideational scholarship that has emerged since Simeon's 1976 essay, we can say that ideas matter because they define problems that move on and off of the policy agenda and help define policy solutions to address these problems, and because they provide political actors with broad ideologies and policy paradigms that help them map the world in which they live (Freeden, 2011; Mehta, 2011). Such ideologies and policy paradigms also participate in the construction of the perceived interests of these actors (Campbell, 2004; Hay, 2011). Ideas can also help actors co-ordinate their actions (Schmidt, 2002, 2011), build coalitions (Béland and Cox, 2016), become framing devices used by policy entrepreneurs (Kingdon, 1995) to legitimize or oppose debated policy alternatives (Campbell, 2004), or even simply help construct the "need to reform" in the first place (Cox, 2001). This is only a partial list of how ideas, which we simply define as causal beliefs (Béland and Cox, 2011; Goldstein and Keohane, 1993), can matter in politics, but it points to the fact that ideas constitute one of the most central forms of explanation in both policy and political research (Parsons, 2007).

As Craig Parsons (2007) claims, however, it is possible and sometimes necessary to combine explanatory factors, especially when the time comes to address empirical puzzles that make simple, univocal causal arguments impossible. More generally, a number of scholars combine different types of explanatory factors as part of broader frameworks for the political analysis of public policy. A number of policy scholars have combined ideas and institutions to formulate more effective and inclusive analytical frameworks (for example, Béland and Lecours, 2013; Campbell, 2004; Lecours, 2005; Lieberman, 2002; Schmidt, 2002; Schmidt, 2011; Walsh, 2000; Weir, 1992). An early example of the type of ideational scholarship that takes institutions seriously is the work of Peter Hall (1986) on the relationship between economic ideas and state institutions in France and the United Kingdom. Other examples of this approach are the work of Vivien Schmidt (2002, 2011) on co-ordinative and communicative discourses and the research of John L. Campbell and Ove K. Pedersen (2014) on the construction of expertise and how national institutions shape the production of such expertise and the creation of what they call "knowledge regimes."

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These three examples illustrate how scholars have combined attention to both ideas and institutions into a coherent framework for the political analysis of policy development. Agency remains a significant component of this framework and of our analysis of the politics of territorial redistributive policies, in which both constituent unit governments (in Canada) and political parties (in Belgium) play crucial roles. Civil society actors, who have featured prominently in the public policy literature in Canada at least since the mid-1990s (Inwood et al., 2011: 7–9), are not overly significant in our two cases of policy change. Civil society actors in Canada seldom advocate change to the equalization programme while, in Belgium, trade unions and employers' organizations have played a role in supporting continuity in the territorial administration of social security rather than seeking its decentralization.

The public policy literature also points to the added value of comparative research for the analysis of the ideas-institutions nexus on the political study of public policy. This is consistent with Simeon's emphasis (1976) on the need for comparative analysis, which is especially clear when scholars deal with institutional processes that vary greatly from one country to the next, in terms of both policy legacies and formal political institutions (Campbell, 2004).

Comparative research is particularly important to assess how specific ideas interact with specific institutions over time (Béland and Waddan, 2015). Political parties and the territorial structuring of the state are particularly important in exploring how institutions may impact ideas in the policy process. Party systems are likely to influence what types of policy ideas politicians consider either relevant or taboo. Because these systems shape the ways political actors think about their strategies, and even their preferences, cross-national differences in party arrangements may explain why the ideas featured in the policy discourse and agenda can vary so greatly between countries. The territorial structuring of the state also affects the ideational landscape. A two-level political scene, such as that in federal states, is particularly favourable to the presence of ideas linked to a multiplicity of political communities, which condition the diffusion and framing of public policy.

In the remainder of this article, we explore the combined impact of ideas and institutions on the politics of redistribution, a central policy issue for Simeon (1976). We study federalism, a terrain familiar to Simeon, to address key analytical points he made in a fresh way, especially the role of ideas, the impact of institutions and the issue of redistribution. By adopting an analytical and comparative approach, we are also following Simeon's advice on how to move policy research forward in political science.

## Federalism and Territorial Redistribution

Simeon's extensive scholarship on federalism is useful in understanding the politics of territorial redistribution, including how it relates to the role of ideas and institutions. Sensitive to both institutional architectures and federal societies (Simeon and Robinson, 1990), Simeon's work presents broad frameworks for analyzing not so much *how* public policies are made but rather *why* they are formulated in the first place, why they are debated and challenged and why they either change or keep their original form for quite a long time.

Although Simeon recognized the existence of great diversity between federal systems (Simeon and Conway, 2001), he also saw federations as a unique form of institutional arrangement, one where self-rule and shared rule are the twin guiding ideas. Simeon was always concerned with finding and striking a proper balance between the institutional autonomy of constituent units and the power of the central government. Indeed, for Simeon, "building out," where constituent unit governments formulate and implement their own public policies, thereby acting upon their own ideational preferences and expressing their own political identity, must be accompanied by some "building in" through institutions and public policies that can support the statewide political community.

From an institutional standpoint, Canada and especially Belgium are multinational states that have relatively few common spaces where state-level redistribution and solidarity can be embedded. In Canada, equalization supports such solidarity and fleshes out an important aspect of Canadian social citizenship: the notion that all Canadians should enjoy access to public services of comparable quality at comparable levels of taxation independent of their province of residence. The 1982 *Constitution Act* committed the Canadian government to make equalization payments. In Belgium, social security is the country's largest redistributive programme and, although it is primarily about inter-personal redistribution, it is widely viewed as the embodiment of inter-community solidarity insofar as Flanders is a net contributor while French-speaking areas are net recipients. In a deeply dichotomized federation, social security is the most important pan-Belgian social policy and one of the only tangible signs of the Belgian political community.

Equalization in Canada and social security in Belgium are important components of the shared-rule aspect of their respective federations. In fact, although federations are characterized by a constitutional division of powers that results in political autonomy for the constituent units (building out), they also require some building in to foster the political community the central government oversees. The self-rule, building out dimension of federalism corresponds to the exercise of political autonomy by constituent units and, sometimes, by their desire to increase that autonomy. The territorial pressures

on redistributive programmes in Canada and Belgium stem from this self-rule dimension. Simeon (1972) showed that, for the Canadian case, the constituent units of a federation can effectively pursue their own policy ideas and perceived interests. In Canada, provinces are political communities with their own political class that can engage in the definition of provincial interests and mobilize residents to defend and promote these interests. The situation in Belgium is quite different, but the gradual empowerment of regions and communities since the beginning of the federalization process in 1970 has led to challenges to the territorial redistribution embedded in social security.

Simeon's scholarship suggests that multinational federations are especially prone to tension (Simeon and Conway, 2001) because their dynamics go beyond constituent units asserting or promoting political autonomy; they involve governments that see themselves as "national" and typically enjoy strong support from the population, who wants to see their distinctiveness reflected in policy making. Tensions over public policy making in multinational federations are also due to resistance on the part of constituent units that tend to oppose policies they view as favouring, or pandering to, their "distinct" counterpart. Strains can be particularly severe in relation to redistributive programmes. In Canada, some of the tensions around the federal equalization programme stem from the idea that Quebec is the main beneficiary of the programme and receives disproportionate benefits.[4] In Belgium, the most nationalist Flemish political parties argue that Francophones use social security disproportionately and that they abuse it.

Yet, from an ideational standpoint, there is at least one major difference between Belgium and Canada that requires explanation. Ideas against existing forms of horizontal territorial redistribution are present in specific regions of both countries, but only in Belgium does the notion of significantly reducing the scope of this type of redistribution profoundly and enduringly shape policy debates. In this context, how do we explain this major disparity in political discourse between Belgium and Canada? As we argue, the answer to this question requires taking cross-national institutional differences seriously, especially with regards to the territorial nature of party systems. In fact, purely regional parties like the ones found in Belgium are much more likely to spread ideas against territorial redistribution, at least when they hail from a wealthier region, than national parties that look to gain votes all across the country, as is generally the case in Canada. Our analysis of the Canadian and Belgian cases backs this claim while illustrating the broader impact of federalism and political parties on territorial redistribution.

## The Politics of Equalization in Canada

Canada's equalization programme, which is managed by the federal government and funded through general tax revenues, was created in 1957

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(MacNevin, 2004: 188–89). The programme dictates that the federal government will make payments to provinces whose fiscal capacity falls below an "equalization standard." For 2014–2015, the federal equalization programme made payments worth a total of $16.7 billion to six provinces: Quebec ($9.3 billion); Ontario ($2 billion); Manitoba ($1.8 billion); New Brunswick ($1.7 billion); Nova Scotia ($1.6 billion), and Prince Edward Island ($360 million).

There are episodic intergovernmental tensions around equalization (Lecours and Béland, 2010). The close to zero-sum nature of equalization payments,[5] combined with the fact that all decisions are made by the federal executive, means that there is an inherent potential for these transfers to become embroiled in the politics of the federation. Canada's multinationalism is crucial to understanding equalization, both in terms of the origins of the programme and the particular pressure on the mechanisms of horizontal fiscal redistribution resulting from Québécois nationalism (Béland and Lecours, 2014).

The connection between national unity and the federal equalization programme emerged in the context of the postwar debate about the tax rental system (Courchene, 1984: 27–35). With this tax rental system, Ottawa took over many provincial taxes in exchange for fiscal transfers to the provinces. Some provinces, especially Quebec, voiced their dissatisfaction with the tax rental system. Quebec's opposition to the tax rental system was the product of French-Canadian nationalism focused on defending the province's autonomy (Balthazar, 1986; Trudeau, 1968). In the late 1940s and 1950s, the Union Nationale (UN) took several steps to bolster provincial autonomy, including opting out of the tax rental system. These events directly impacted discussions over the future of federal fiscal policy (Milne, 1998: 190). Quebec's autonomist politics were instrumental in the 1957 creation of equalization as a horizontal fiscal redistribution programme that allowed the central government to craft territorial redistribution in a way that tied Quebec to the rest of the country. As Bryden wrote, the allocation of "equalization payments…would be a way of ending the isolation of Quebec" (2009: 81).

Equalization did not stunt the growth of Québécois nationalism. Still, there are reasons to think it may have mitigated the consequences of this nationalism for Canadian federalism, at least when it comes to the secessionist option, since equalization has provided explicit fiscal incentives for Quebeckers to remain Canadian citizens (Béland and Lecours, 2014). Financial and economic issues have always been a weak point for the Québécois secessionist movement. In the 1980 referendum, the "no" side made various financial and economic arguments suggesting that Quebeckers would be less well off after independence. In addition to references to economic isolation, this discourse emphasized the loss of fiscal transfers, especially equalization, which would come with independence.

The "no" side's arguments remained fairly similar in the 1995 referendum; Quebeckers were encouraged to vote "no" in part so that they would not lose the fiscal support federalism provided.

More generally, Quebec politicians who oppose independence have often said that Canadian federalism is a worthwhile financial proposition for the province. Long-time Quebec Premier Robert Bourassa famously spoke of *le fédéralisme rentable* (profitable federalism) as a way to highlight the concrete benefits of staying in Canada. Equalization payments are a big part of this *fédéralisme rentable.* This type of defense for Canadian federalism has only grown in importance over the years.

Sovereignist politicians typically want to avoid any discussion of equalization. When pressed to speak about Quebec's relationship with the programme, these politicians will attempt to put equalization in a broader fiscal context (interview with Bloc québécois (BQ) member of Parliament, 2011). In the overall scheme of fiscal federalism, they suggest, Quebec does not gain but probably comes out a loser, in part because the federal government has invested more heavily in other provinces than in theirs. The dominant sovereignist view on equalization is that it simply returns a part of what Quebeckers have paid the federal government in taxes and other contributions. Sometimes, sovereignists make the bolder argument that Quebec loses a lot of money as a result of equalization and would therefore be better off independent (Parti québécois, 2016). The view that Quebec is a net fiscal loser in Canada has some credibility in the province. For example, in a 2009 public opinion poll, 31 per cent of Quebeckers said that they paid more income tax to the federal government than the federal government spent in the province, compared to 23 per cent who said the opposite (the remaining 46% either felt things evened out or did not know) (L'Idée Fédérale, 2009).[6] Still, equalization payments represent tangible benefits that are difficult for sovereignist politicians to minimize. In sum, there are reasons to think that equalization has accommodated Quebeckers not only by providing fiscal incentives for the province to remain within Canada, but also by working to keep many Quebeckers feeling they are part of the Canadian political community.

Another key source of tension around equalization involves a reaction against nationalist politics and ideas in Quebec. In certain provinces, particularly but not exclusively in Alberta, equalization is often depicted by the media and some politicians as a programme that unfairly benefits Quebec[7]. This resentment is linked to five arguments about Quebec and equalization (Béland and Lecours, 2014). The first argument is that Quebec receives too much equalization money. Quebec has been receiving equalization payments since the inception of the programme in 1957. Provincial politicians outside Quebec have often highlighted that fact. Already in 1971, for example, British Columbia Premier W.A.C. Bennett stated, "The Government of Canada has paid out over $5,500,000,000 in equalization payments since their introduction in 1957, and they continue

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to increase substantially each year. One province, Quebec, received 47 per cent of this amount." (Bennett, cited in Resnick, 2000: 23)[8] Reporting on equalization outside Quebec also tends to emphasize that Quebec receives the "the lion's share" of equalization payments (Howlett and Carmichael, 2008). Yet, provinces like New Brunswick and Prince Edward Island rely more on equalization payments as shown by per capita statistics (Perry, 1997: 170). The media's tendency not to speak in per capita terms feeds resentment towards Quebec and the programme as a whole, especially in a wealthy province like Alberta, which has not received equalization payments since the early 1960s (Courchene, 1984).

The second argument is that equalization payments are a political tool to accommodate Quebec. As we have seen, there are good reasons to think this, if only because equalization provides Quebeckers with a material disincentive to leave the federation. The structural feature of the programme that leads to cynicism being generated about equalization and Quebec in the rest of the country is the management role of the federal government. Contrary to other federations, decisions on equalization payments in Canada are at the discretion of the federal executive. This allows for the politicization of equalization (on this issue, see Béland and Lecours, 2011; Lecours and Béland, 2010) or, at the very least, the perception that decisions on equalization obey some sort of political logic. Although public opinion data specifically about equalization are very limited, one could think that the notion of a programme whose primary stated objective is to help poorer provinces deliver quality public services serves the politics of nationalist accommodation could be controversial. The fact that independence remains an option in Quebec and that Quebec governments have put forward various claims for self-determination despite the perceived financial benefits of federation adds to the frustration. Former Alberta finance minister Ted Morton (2005: 3) once claimed that "Alberta's fate appears to be the opposite of Quebec's: the more it contributes financially, the less it receives politically."[9] In other words, Quebec's perceived political clout in the context of equalization payments brings resentment towards both Quebec and the programme.

The third argument is that, through equalization, wealthier provinces such as Alberta and Ontario have been financing Quebec's progressive social policies (Holle, 2012; Milke and McMahon, 2012). While there is significant policy divergence across the provinces, the cleavage between Quebec and the other provinces stands out. For example, social policy choices in Quebec have led to a publicly funded daycare system, a public drug insurance programme and the second lowest university tuition fees in the country. Perhaps even more important politically, Quebec leaders and many pundits hail these policies as better than those elsewhere in the country. They are also said to reflect a society that is more progressive than in any other province and where the values of generosity and

compassion are more present than in the rest of Canada (Béland and Lecours, 2008). These much vaunted social policies are met with some confusion in the rest of Canada. The notion that Quebec can "afford" these policies seems impossible. In this context, the workings of fiscal federalism, and more specifically the equalization programme, are used to account for why Quebec offers several costly social programme politicians in other provinces say they cannot afford. Thus, the seemingly dominant notion in English-speaking Canada is that non-recipient provinces such as Alberta and British Columbia "help fund Quebec's lavish social programs" (Milke, 2012). This notion is fed by newspaper commentaries and conservative think tanks (Eisen and Milke, 2010) and is seldom challenged. For example, in 2012, when Quebec university students began a massive mobilization to oppose a tuition hike, commentators in Alberta suggested that Quebec students needed a lesson in equalization so they understood that Albertans were paying for their modest tuition fees (Corbella, 2012).

The fourth argument is that while equalization unfairly favours Quebeckers, it is also inefficient because it promotes economic dependency in Quebec and other poorer provinces (Holle, 2012). When it comes to Quebec, arguments about inefficiency and unfairness often come back to the management of its political distinctiveness within the Canadian federation. For example:

> Initially, equalization was intended to help poorer parts of the country catch up to the wealthier parts. Now, it is simply assumed that the poor will stay poor. BC and Saskatchewan might move in or out of the "have" column, but Quebec and Atlantic Canada will remain firmly entrenched in equalization dependence, and no one expects that to change. […] But then, if Quebec were to actually free itself from federal equalization, one vital argument for staying within Confederation would be lost. (Ibbitson, 2004: A4)

Finally, as this last sentence points to, equalization payments are often viewed as a way to "buy" federalist votes. For instance, as stated in the *Toronto Star*: "Especially in his first mandate, Harper seemed intent on gaining the favour of Quebecers. For instance, he recalibrated the equalization formula, giving Quebec billions of dollars more" (Chung, 2008: A19). Sometimes, the view is that this equalization money is used to pursue the objective of independence: "Quebec uses its equalization windfall, not to improve essential services but to fund its secessionist agenda. Hence, Ontario and Alberta are being forced to subsidized [sic] Quebec's secessionist movement. Another reason to scrap the equalization program" (Sauve, 2004: A15). Canada's key programme of horizontal fiscal redistribution is subject to a particularly critical viewpoint resulting from nationalist ideas coming out of Quebec.

Yet these criticisms have not significantly permeated *electoral* politics in Canada. Whatever members of Parliament (MPs) and voters may think about equalization (and its relationship to Quebec), political parties have long believed that forming a government was not a realistic possibility without winning several seats in Quebec (something partially disproven by the last Stephen Harper Conservative government). Alienating Quebeckers by adopting a position critical of equalization and bringing up this topic during an election campaign is therefore seen as a dangerous proposition.[10] Perhaps more importantly, federal politicians making critical comments towards Quebec in relation to equalization could have been viewed as endangering national unity. The existence in Canada of national parties that not only need some electoral support in Quebec, but also seek to play a "brokerage" role with respect to the territorial and linguistic cleavage in the country, imposes restraint on the political class in their criticisms of equalization.[11] In fact, this self-imposed restraint of the traditional political parties has meant there is very little discussion about territorial redistribution, let alone equalization specifically, in federal politics.[12]

## The Politics of Social Insurance in Belgium

The Flemish political class has shown no similar restraint with respect to social security, at least not since Belgian political parties split upon linguistic lines in the late 1960s. This split has its origins in the development of the Belgian state. Belgium was created in 1830 as a centralized unitary state. Although sociologically multilingual with its French-speaking and Dutch-speaking populations, the early Belgian state was dominated by Francophones and functioned almost exclusively in French. Powerful decentralizing pressures emerged over time. These pressures originated mainly in the mobilization of Flemish nationalism (Wils, 1996). Political upheavals after the Second World War favoured a series of institutional changes, including the splitting of political parties changes. By 1993, Belgium had evolved from a centralized unitary state to a federal system.

The splitting of all political parties along linguistic lines facilitated decentralization. As a result of the disappearance of national parties, two distinct political scenes and publics developed in Belgium: the Flemish, where decentralization is viewed as positive and the idea of the nation is linked to Flanders as much, if not more, than it is to Belgium; and the French speaking, where decentralization is generally viewed with suspicion and the idea of the nation refers to Belgium. Social insurance splitting becomes a major issue in this institutional and partisan context. Most Flemish parties favour splitting at least portions of social security. They point to the unfairness of a system that transfers fiscal resources from Flanders to Wallonia, the French-speaking region that used to be the

country's economic engine. Because of higher unemployment rates in Wallonia, for instance, social insurance schemes in the region collect less in social insurance contributions on average and pay more in social benefits than in Flanders. Flemish parties, especially the nationalist Nieuw-Vlaams Alliantie (N-VA), but also the Christian Democrats and the Liberals, bring up this issue during election campaigns. The aggressive position of N-VA on splitting social insurance puts great pressure on other Flemish parties to also "stand up" for Flanders, since they all court only Flemish voters.

Although the size of transfers between Flanders and Wallonia is both contested and hard to assess, the push to decentralize elements of the country's social security system is a significant aspect of Flemish nationalism's quest for further reforms to the state or, in the case of the far-right and separatist party Vlaams Belang (formerly Vlaams Blok) and even N-VA, outright independence. Most importantly, the debate about territorial social insurance transfers in Belgium is generally grounded in nationalist ideas that shape the discourse on both sides of the language divide.

On one side of this divide, Flemish nationalist writers and politicians have made numerous statements about transfers that highlight their attempt to frame the boundaries of solidarity in purely nationalistic ways, thereby symbolically excluding Francophones from their political and social policy community. From their perspective, the problem with the social security system is not so much the existence of territorial solidarity but the fact that this solidarity transcends language and national boundaries. In other words, the problem with this territorially centralized system is that it allows money from payroll contributions to flow between different regions. This is important because Flemish nationalists do not speak about internal economic and social policy disparities *within* Flanders; redistribution *within* the region is legitimate. So the problem for Flemish nationalists is only one type of territorial redistribution—where the Flemish people allegedly subsidize Walloons in key social security areas (Béland and Lecours, 2008).

The nationalist N-VA, the strongest party in Flanders in the 2010 and 2014 federal elections, is a key player in this discussion. In the campaign before the May 2014 elections, the N-VA clearly stated its preference to decentralize social security so that the Flemish and Francophone communities could each develop its own social policy model (for example, see the interview with Ben Weyts in Coppi, 2014). Although most Flemish parties seek the decentralization of selected components of social policy, N-VA's plan involves the wholesale splitting of social insurance, including health care, pensions and unemployment insurance (Mouton, 2014). Its discourse in not unlike that of the more radical (but now more marginal) Vlaams Belang; that party's literature declares that Francophones and Flemings belong to two different nations (Vlaams Blok, 2003: 1–5). As a consequence, Flemish solidarity should not extend to Francophones;

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instead, Flemings should treat them as they treat foreigners. There is, therefore, little solidarity between the two groups and the "rivers of money" flowing from Flanders to Wallonia, as they are described, are unfair and illegitimate, especially because Wallonia is said to be an inferior region plagued with a culture of dependence and chronic government waste (Vlaams Blok, 2003: 7). This discourse about redistribution and territorial solidarity relies on strong cultural and national stereotypes: Flemings are described as autonomous and hardworking[13] while Walloons are viewed as lazy and dependent (Béland and Lecours, 2008).

Although the Vlaams Belang's discourse on social security is particularly radical, attacks on the very idea of a Belgian solidarity that could transcend the language divide are also present in the N-VA (which is now a partner in the Belgian federal government), as well as in the Flemish Liberals and Christian Democrats (Poirier and Vansteenkiste, 2000). The delegitimization of transfers inherent to Flemish nationalist discourse puts great pressure on social security's territorial structuring. Moreover, Flemish parties tend to justify the need to split social security based on the idea of a different "societal consensus" in Flanders (right of centre) and French-speaking Belgium (left of centre). Therefore, these parties are at once looking for a different type of social security, as well as a different territorial management of the system, all in the name of Flemish distinctiveness.

French-speaking writers and politicians, on the other hand, have formulated a counter-discourse centred on the idea of a pan-Belgian solidarity that transcends the linguistic divide (Poirier and Vansteenkiste, 2000). This idea is especially powerful among French speakers since most Francophones oppose further decentralization, which they associate with the disintegration of the country. Claiming that Flemish nationalists exaggerate the scope of interregional transfers, some of these actors also argue that socio-economic variables like employment levels, rather than waste and cultural dependency, explain the patterns of the transfers. Simultaneously, country-wide social partners such as labour unions and the main business organizations have long opposed social security decentralization (Bouteca et al., 2013).

In the field of social insurance but outside of social security, a meaningful policy change that occurred in Belgium in recent decades is the implementation of a care insurance scheme in Flanders (Jorens, 2006). A significant policy issue in the 1990s, care insurance was debated in federal parliament but, due to a lack of political consensus, no legislation was passed. Partly because they wanted to use the issue as a symbol for Flanders' increasing policy autonomy, Flemish politicians ended up supporting the adoption of a care insurance programme exclusively based in their region, without any equivalent in Wallonia, which could not afford to create a programme on its own (Béland and Lecours, 2008). Francophone experts and politicians viewed the decision to go ahead and implement a care insurance scheme in Flanders alone as an attack on Belgian solidarity.

From their perspective, the creation of the Flemish programme constituted a clear step towards the end of a unified welfare state in Belgium (Jorens, 2006). A clear example of policy layering (Thelen, 2004), the addition of a Flemish disability insurance programme alongside the federal social security system was viewed in French-speaking Belgium as a nationalist move against territorial, inter-regional redistribution and solidarity in Belgium.

At the federal level, despite the existence of civil society organizations opposed to the decentralization of social security, this issue has appeared on the political and policy agenda during almost every negotiation over government formation. This was most spectacularly the case in the negotiations following the 2010 elections that lasted 541 days (Reman and Feltesse, 2011; Tissot, 2011). These negotiations led to the advent of a Sixth State Reform that decentralizes family allowances, among other provisions (Dumont, 2015; Goossens and Cannoot, 2015; Popelier and Cantillon, 2013; Reuchamps, 2013). Because family allowances are formally part of social security, it means that the agreement among political parties over government formation created a window of opportunity for the first direct decentralization of social security in Belgium. Although the other components of social security remain centralized, the question of their possible decentralization is likely to return to the agenda as Flemish parties keep raising the issue.

Overall, this case study clearly backs our main claim that, in a multinational state like Belgium, the politics of redistribution comes under intense pressure from nationalist ideas and that these ideas prove particularly potent and politicized in the context of a party system where regionally based parties dominate. In other words, as is the case of equalization in Canada, the politics of redistribution in Belgium are shaped by a combination of nationalist mobilization and institutional forces in the context of enduring interregional fiscal and economic disparities. As our analysis suggests, unlike its Canadian counterpart, the Belgian party system allows territorial redistribution to remain a key issue on the federal political agenda, a reality that has recently facilitated significant changes to the social security system through the adoption of the Sixth State Reform, whose implementation is an ongoing process. Considering the purely regional nature of Belgian political parties, it is likely that the issue of social security decentralization will remain on the federal agenda for years to come.

## Conclusion

Following Simeon (1976), our analysis has explored how ideas and institutions interact to shape the politics of territorial redistribution in Canada and Belgium. This analysis has clearly shown that nationalist ideas have put

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pressure on the equalization and social security programmes of both Canada and, especially, Belgium. As our institutional analysis has suggested, however, the presence of such ideas is a necessary yet not sufficient condition for significant change in the territorial organization of redistributive policies to occur. As argued, the party system is the central variable that determines the effective policy impact of these ideological and political pressures on such programmes. For instance, Belgium's territorially fragmented party system is much more conducive to the emergence of redistribution on the federal policy agenda than Canada's more territorially integrated party system. This is why the comparison between Canada and Belgium is so insightful. What we have here is two multinational federal countries that struggle to maintain territorial integration through redistributive policies while featuring very different party systems. Like the work of Antonia Maioni (1998) on the development of health insurance in Canada and the United States, our work suggests that party systems are an essential institutional factor to take into account when studying the politics of public policy in federal systems. What our analysis adds to this general point is that party systems play a central role in mediating the impact of nationalist and regionalist ideas about territorial redistribution in federal systems. This analysis is consistent with the work of Simeon (1976), who thought that studying public policy requires that we pay systematic attention to both ideas and institutions.

Overall, this article shows how the politics of territorial redistribution in multinational federations like Canada and Belgium is conditioned by both nationalist ideas and the institutional configuration of the state and the party system. In the end, our analysis meshed Simeon's call for rigorous analysis of the politics of public policies formulated in "Studying Public Policy" (1976: 562) with the strong emphasis on federalism and territorial politics present elsewhere in his work. We hope this article convinces students of federalism and territorial redistribution to pay closer attention to the causal interaction of ideas and institutions, an approach consistent with Simeon's call to take explanation seriously in the political analysis of public policy.

## Endnotes

1 Even if social security is primarily about transfers to individuals and families, in Belgium, it is widely understood as having a clear territorial redistribution component, something that our analysis makes clear. As for equalization policy in Canada, it is related to welfare state development (Théret, 1999). In this context, it is legitimate to compare social security in Belgium with equalization policy in Canada as each of these programmes is at the forefront of the territorial politics of redistribution in their respective country.

2 For a discussion of the potential impact of party systems on policy change in federal countries, see Maioni (1998).

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3 For example, Béland and Cox (2011), Bhatia and Coleman (2003), Blyth (2002), Campbell (2004), Hall (1993), Lieberman (2002), Padamsee (2009), Schmidt (2011), Skogstad (1998, 2011), White (2002).
4 It is also sometimes said Atlantic provinces have developed a "culture of dependency" as a result of consistently receiving (with the partial exception of Newfoundland) equalization payments.
5 Historically, the equalization programme has worked primarily with a formula-driven pool but, in reality, the more money a province received, the less there tended to be for another receiving province. Constraints such as the equalization cap took the programme close to a zero-sum game. Since the introduction by the Harper government in 2009 of a ceiling on equalization, the programme is basically zero sum as the total pool is linked to GDP growth rather than the actual territorial economic disparities.
6 Polls on the question of whether or not Quebec benefits (from a fiscal point of view) from being part of the Canadian federation typically show similar data. Therefore, the BQ and PQ argument that equalization payments to Quebec is simply Quebec's money coming back or, worse, insufficient compensation from a presumed lack of spending in Quebec by the federal government might trigger disbelief elsewhere in Canada but has some support in the province.
7 For example, after he became Alberta's Finance Minister, Ted Morton "vowed to visit university campuses [in Alberta] and tell students 'You and your parents are spending a bunch of money to help Quebec, and they're paying half the tuition you are'" (Chung, 2010).
8 That BC premier also called into question the economic efficacy of the federal equalization programme (Bennett, cited in Resnick, 2000: 23).
9 In Alberta as elsewhere in Canada, it is common to misrepresent how equalization works by stating that money from richer provinces is directly sent to poorer ones, which is not the case as citizens from all provinces contribute (Beauchamp, 2004: A19).
10 In its early years, the Reform party was quite critical of Quebec in relation to equalization. At that time, it was strictly a regionalist party that claimed to speak for Western Canada, and had no real objective to form the federal government. As Reform began looking for support East of Manitoba, its criticism of Quebec in relation to the equalization system was softened.
11 Canada's uninominal majoritarian electoral system discourages the development of regionalist parties with a small territorial basis. For example, a federal party with an exclusive territorial focus on the Atlantic provinces, or on one single province (with the exception of Quebec and Ontario), would be hard-pressed to win a significant number of seats. The Reform party was able to have success because it sought to represent "Western Canada" while the Bloc québécois was also a significant force in federal politics because Quebec has had close to a quarter of the seats in the House of Commons. In Belgium, by contrast, a proportional system of list that uses the d'Hondt method for seats distribution has been in operation since 1899 and has facilitated the splitting of political parties along language lines.
12 The two parties that sought to change this situation, Reform and the BQ, were successful for a while (primarily in the 1990s) but their disappearance (in the case of Reform) or considerable weakening (in the case of the BQ) has led to a return to a federal political scene where the management of the federation is barely discussed.
13 The popular slogan "Wat We Self Doen, Doen We Beter" (What we do ourselves, we do better) exemplifies this collective self-assessment (Erk, 2003).

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