

# **Ideational legacies and the politics of migration in European minority regions**

A book manuscript by Christina Isabel Zuber

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[mail@christinazuber.com](mailto:mail@christinazuber.com)

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*Interessen (materielle und ideelle), nicht: Ideen, beherrschen unmittelbar das Handeln der Menschen. Aber: die 'Weltbilder', welche durch 'Ideen' geschaffen wurden, haben sehr oft als Weichensteller die Bahnen bestimmt, in denen die Dynamik der Interessen das Handeln fortbewegte.<sup>2</sup>*

Max Weber (1988 [1916]: 252)

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2 Not ideas, but material and ideal interests, directly govern men's conduct. Yet very frequently the 'world images' that have been created by 'ideas' have, like switchmen, determined the tracks along which action has been pushed by the dynamic of interest.

# **Ideational legacies and the politics of migration: an introduction**

When a law regulating the reception of immigrants was discussed in the Catalan parliament on 14 October 2009 and 28 April 2010, the atmosphere was consensual. All parliamentarians—irrespective of their partisan affiliation—embraced the fact that immigration was making a positive contribution to Catalan society. The only controversial issue was whether immigrants should be addressed predominantly in Catalan, or whether the Spanish and Catalan languages should play an equal role. Proposed by a coalition of Catalan nationalist and left-wing parties, the law that promoted a vision of integration based on social equality also received support from centre-right parties in the opposition. Its preamble reiterated parliamentarians’ positive view of immigration, quoting from the Catalan statute of autonomy: ‘Over the course of time, Catalonia has been shaped by the energy of many generations, traditions, and cultures, which found in Catalonia a land of welcome.’

By contrast, when a law regulating the integration of foreign citizens was discussed in the parliament of the northern Italian province of South Tyrol on 15 and 16 September 2011, and on 6 and 21 October 2011, the sittings were all but consensual. On the fourth and final day, debate ran from 10.00 am until 6.30 am the next day. Presentation of the law was followed by a heated debate on whether immigration was good or bad for South Tyrol. The main opposition party, the anti-immigrant *Freedom Party*, vociferously advocated for ‘solving’ immigration through a guest-worker scheme, allowing only limited stays, and prohibiting family

reunification, thus rendering any integration measures obsolete. On the other side of the spectrum, the Greens criticized the law for not being inclusive enough. The law took a partly exclusive stance and specified, *inter alia*, that immigrants could not access social benefits during their first five years of residence.

Why are Catalan political parties united in portraying immigration as an opportunity, while in South Tyrol—as in many European democracies—immigration represents a hotly contested political issue? And why does Catalonia opt for a model of immigrant integration based on social equality, while South Tyrol chooses a more exclusionary approach?

*Economic theories* would search for variation in regional economies. Political responses are expected to be more inclusive if there are high demands for immigration due to economic growth, low unemployment and low fertility rates (Janoski 2010: 16, Timmer & Williamson 1998). Conversely, declining macroeconomic conditions are related to increasing hostility towards immigrants (Isaksen et al. 2016: 252–254). However, both regions are richer than their countries' average, have low birth rates, and have witnessed rising immigration rates from poorer countries of origin since the late 1990s. Especially since the 2008 financial crisis, Catalonia, but not South Tyrol, has been struggling with high unemployment.

*Institutional theories* would argue that what matters are the incentives of the institutional framework. Whether immigration-related competencies are decentralized is considered to be a crucial factor in explaining minority regions' responses to immigration. Having their own elites set the terms of migration is expected to reduce fears that immigration will undermine cultural distinctiveness.

This would allow minority regions to adopt an inclusive approach (Kymlicka 2001). Yet Italian and Spanish decentralization processes granted both regions almost identical competencies. In fact, the only major institutional difference would predict South Tyrol to be the more inclusive region: In South Tyrol, public sector jobs and social housing are allocated based on language quotas, granting a fixed share to German, Italian, and the small minority of Ladin speakers. The quotas are calculated based on the relative size of each group according to the most recent population census, which asks naturalized immigrants to declare their affiliation with either of the three linguistic groups. Political elites representing German speakers should therefore have an incentive to propose inclusive policies that can convince immigrants to affiliate with the German-language group in order to increase the German quota. Conversely, there is no linguistic quota system within Catalonia, so Catalans do not gain such benefits from turning immigrants into Catalan, rather than Spanish, speakers.

Why do political elites in the two contexts act so differently? Conventional explanations based on economic interests and political institutions still leave us with the puzzle that two similar political communities define their relationship with immigrants in different ways.

This book argues that these differences are rooted in *historical legacies*. It builds a theory that explicates how past experiences with migration-based diversity lead to political choices of the present—choices that seem irrational, given the economic and institutional incentives of contemporary migration in both regions. Specifically, differences in the two regions' political responses to *international* migration in the 2000s are explained by the political economy of *internal* migration between the

1920s and the 1970s. During that time, Catalans were in the driver's seat of industrialization, receiving migrant workers from the rest of Spain. South Tyroleans, by contrast, were in the passenger's seat of industrialization, perceiving Italians who migrated to their region as colonizers. Over time, socioeconomic conditions in both regions changed, and internal was replaced with international migration. Yet officials continued to understand the challenge of migration within the framework of a long-gone situation—a situation that had been characterized by economic opportunity in Catalonia and ethnic competition and threat in South Tyrol (cf. Medda-Windischer & Carlà 2015). I argue that the key to understanding this behaviour lies in a mechanism of ideational stabilization that connects incentives of the past to political choices of the present. In addition to solving the empirical puzzle of why European minority regions respond differently to immigration, this argument explicates popular, yet under-theorized, legacy explanations in migration research and contributes a novel account of ideas as transmitters of policy stability (rather than change) to the repertoire of ideational theories in the comparative public policy and political economy literatures.

## **Intellectual context and contribution**

The broad label 'politics of migration' is used here to capture two aspects that together characterize how a political community responds to immigration: (1) the positions and frames political parties adopt when addressing immigration in political discourse, and (2) the concrete policies they propose to regulate how immigrants find their place in the host society (Czaika & De Haas 2011; Green-Pedersen & Otjes 2019). Three types of migration-related policies can be

differentiated: *Immigration policies* define the conditions under which immigrants can cross territorial boundaries; *integration policies* define the permeability of social boundaries and accompany immigrants in their process of settling into their new environment; *citizenship policies* define political boundaries by setting the criteria for becoming a citizen—fully equal member of the political community (Hammar 1990; Helbling 2016). When it comes to policies, my focus in this book lies on integration and citizenship policies because they define the conditions under which migrants can become an accepted, permanent part of the host society. By contrast, immigration policies are often treated separately in the literature, and for good reason, since states can well promote immigration—for example to increase the temporary availability of labour—while at the same time being unwilling to socially integrate and naturalize those immigrants (Janoski 2010: 4–5).

Historical legacies are frequently invoked in both popular and academic accounts of integration and citizenship policies. Inspired by the striking stability of policies regulating the inclusion of migrants into the social and political community (e.g. Howard 2009; Koopmans, Michalowski, & Waibel 2012), legacy explanations tend to single out a transformative historical event (also referred to as the ‘antecedent’ in legacy research, see Wittenberg 2015), in which a society was originally confronted with diversity and learned to integrate ethnocultural ‘others’ into the political community. This transformative event is then thought to influence the subsequent political trajectory, sometimes over the course of centuries—and despite significant changes in the socioeconomic and institutional environment. Accordingly, the past necessity of having as many eager hands as possible to work the land is seen as a reason why settler societies like Canada or the US have less restrictive migration and citizenship policies than European nation states, which

lack the experience of colonizing new lands in a communion of immigrants (Janoski 2010). Legacy arguments are similarly applied to policy differences among European nation states. Europe's leading colonial powers often maintained control over their colonies by granting citizenship rights to colonial subjects in exchange for loyal service to the colonial bureaucracy and military, rather than resorting to the more expensive use of force. This practice is believed to have accustomed their societies to ethnic and racial diversity, which could explain why European countries like the UK and France have less restrictive citizenship policies than European countries without a long-standing colonial history (Janoski 2010; Koopmans & Michalowski 2017). Similarly, the absence of colonizer histories is invoked to make sense of the migration-anxiety in many Central and Eastern European countries (Krastev 2017: 48). Among the long-standing colonizers, contemporary integration philosophies are traced back to different styles of colonial rule. Britain's indirect rule that drew on pre-existing traditional forms of governance in the colonies is associated with their multiculturalist immigrant integration policies, while France's direct rule replaced native with French institutions and is associated with their assimilationist model (Favell 1998).

Perhaps most famously, the original historical sequence of nation- and state-building is believed to have demarcated whether political communities define themselves in ethnic terms, on the one hand, or in civic terms, on the other. These dominant conceptions of identity are then assumed to persist for centuries; the consequence for immigrants is that, while it is possible to opt into a civic nation, membership of an ethnic nation is reserved to those with particular ancestry. According to this argument, nations like Germany and Italy, where the idea of the culturally homogenous nation was constructed before the modern state, and

provided the basis for national unification, were set on a more exclusive, ethnic trajectory. Conversely, the modern states of France and the UK developed first, with the nation being defined later by the state's territory, shared principles and constitutional norms (Brubaker 1992; Kohn 1944; Tilly 1994). Finally, the popularity of legacy explanations is not restricted to nation states, but extends to political communities at the regional and local level. The field of migration studies has recently turned from 'methodological nationalism' (Wimmer & Glick Schiller 2006) toward a more open view of how the subnational level adapts to migration-based diversity. Regional traditions of citizenship and sub-state nationalism have been invoked to explain differences in the integration policies of Belgian federal units (Adam 2013), Swiss cantons (Manatschal 2012) and Italian regions (Piccoli 2020); regional histories of (e)migration are thought to shape Catalonia's and Scotland's push for a devolved admissions policy (Arrighi de Casanova 2014) while local histories are believed to influence the governance of migration and diversity in German and British cities (Hackett 2019).

All these explanations find a striking continuity in the ways in which political communities set the terms for the inclusion and exclusion of newcomers. But they also share a serious shortcoming: they fail to delineate the mechanisms that could explicate *how* past experiences with diversity can come to influence contemporary political dynamics and policies. While Brubaker (1992) argued that the historical construction of nationhood led to different citizenship and integration policies in France and Germany, Janoski (2010: 7) rightfully points out that 'searching for the genetic code of citizenship policies lacks force as an argument because it looks at unique events that must have a continuous effect over centuries. Where are the developmental mechanisms, and who are the agents acting them out?'. Without an

answer to these questions, legacy accounts encounter two problems: one methodological and one theoretical.

First, without proper theorizing and empirical analysis of their mechanisms, the causal claims of legacy explanations remain susceptible to credibility challenges (Simpser et al. 2018: 421). For example, Bleich (2005) shows that, upon closer investigation, there simply is no causal connection between the legacy of direct versus indirect colonial rule and contemporary integration policy models in the UK and France. There is neither a material connection between the colonial past and the present, as colonial institutions have not been adapted to new immigrants, nor is there an ideational connection, as actors do not invoke colonial traditions when deciding on contemporary integration policies.

Second, legacy explanations lack a consistent behavioural theory at the micro level of actors' choices. The argument that historical decisions were triggered by the instrumental necessities of settlement or colonial rule, takes for granted that material incentives influenced the political choices of the past. However, this conflicts with how the same legacy explanations account for contemporary political decisions—as following the logic of an historical event rather than from a rational assessment of the costs and benefits of immigration. But which micro-level theory can reconcile rational choices of the past with seemingly irrational choices of the present?

This book argues that the missing link between past incentives and present choices is *ideational*: policy ideas are caused by the rational incentives inherent in an original historical constellation. But over time, the ideas themselves come to function as causes of political choices in the present. Inspired by the experience of two

minority regions, caught in the legacy of their first large-scale encounter with migration, I identify two constitutive elements of this mechanism of ideational policy stabilization: discursive consensus-building among political elites (*ideas as frames in communication*), and the formation of day-to-day routines among bureaucrats (*ideas as policy practices*). As explained in more detail in Chapter 1, if this mechanism is at work, ideas can outlast their original causes and effectively connect incentives of the past to choices of the present.<sup>3</sup>

At the micro level, the theory of ideational stabilization is grounded in Chong's (2000) theory of rational lives that, unlike classical rational choice theory, sees behaviour as a consequence not only of *incentives* but also of *dispositions*. Dispositions are a product of the social values and identities an individual acquires through socialization. This micro-foundation bridges the theoretical gap between past incentives and present choices: whereas ideas emerged from the more dynamic *incentives* in the past, over time, and through stabilization in policy discourse and policy practice, they come to form part of the repertoire of societal values and identities, and thus of the more stable *dispositional* part of the behavioural equation. Importantly, following Chong (2000), dispositions are compatible with a rational account of behaviour because they reflect past investments in the acquisition of values and identities during socialization. Stabilized into dispositions, ideas can then effectively override the incentives of a new choice situation, leading to a political response that reflects an historical situation, rather than a current challenge.

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3 Janoski clearly has ideational mechanisms in mind when he states that 'once social institutions and political ideologies support open immigration and naturalization policies, they become nearly unstoppable' (Janoski 2010: 13), yet neither he, nor others invoking legacy explanations, link their arguments explicitly to scholarship on ideas.

In addition to solving this theoretical problem, which has bedevilled popular legacy explanations in migration research, the theory of ideational stabilization takes the literature on comparative public policy and political economy a step further by using ideas to explain stable choices despite changing economic and institutional incentives. Emphasizing the causal power of ideas for political outcomes has a long-standing tradition, defined by authors like Berman (1998), Bleich (2003), Blyth (2002), Hall (1989), Jacobs (2009), McNamara (1998), or Schmidt (2010). So far, these scholars have predominantly used ideas to explain change, in cases where the mere configuration of interests and institutions would predict stability (Hay 2006: 57, Schmidt 2008: 304). Shifting the focus from change to stability answers recent calls to use ideational theories to also account for the cognitive micro-foundations of stability (Blyth et al. 2016).

Stability in political choices is often associated with historical institutionalism and its core concept of path dependency. A few words about the relationship between ideational stabilization and institutional path dependency are thus in order. In the *Oxford Handbook of Historical Institutionalism*, Blyth et al. (2016: 142) argue in favour of ‘a “conscious re-coupling” of ideational and institutional research agendas’. According to these authors, the function of ideas is to elucidate path dependency and gradual, endogenous change at the cognitive level, rather than to substitute ideas for institutional path dependencies. I agree that ideational and institutional processes of stabilization often go hand in hand. Yet from the perspective of legacies, ideas take on their explanatory function precisely in situations where there is an interruption to institutions established in response to an historical event, and which therefore could have formed the grounds for path dependency. This is the first key difference between path dependency and the theory of ideational

stabilization: under the latter perspective, ideas can transport incentives of past events to the present as discursive frames and policy practices *even as* the institutional path is abandoned. Ideational stabilization is thus complementary to institutional path dependency; it can account for instances of stability that are *not* driven by the increasing returns of a set of institutional rules (Pierson 2000).

A second key difference is that ideational stabilization theory deliberately seeks to account for historical legacy explanations that locate the antecedent of a legacy in the material incentives of an historical situation, whereas ideational scholars have sought to enrich historical institutionalist explanations of path-dependent policymaking while disputing such a material anchoring of ideas. Path dependency describes a relationship between past and present policies, where institutions and past policy explain present policy. As a hypothetical example, if we start off with 'blue' policy, we will later end up with blue policy, though it might come in a lighter or darker shade of blue. Unlike legacy explanations, this model is not interested in explaining why political actors chose blue in the first place. Ideational scholars have therefore argued that historical institutionalists need ideas to explain the content of policy change (Béland 2005). However, if we truly want to understand why politicians originally opted for blue (and keep opting for blue) in one case, but opt for yellow in another, even an ideationally enriched model remains unsatisfying. Having originally wondered why a blue policy was chosen over yellow, we are now left wondering why *blue ideas* won over *yellow ideas*. Ideas might thus elucidate mechanisms of change and persistence better than path-dependent arguments, but they cannot enlighten us about the original cause of policy differences. By contrast, legacy explanations point to institutions and interests of the past to account for why an original trajectory was chosen; the theory introduced here adds an

ideational mechanism of transmission to explicate how that trajectory stabilized, *despite* changes in institutions and interests over time.<sup>4</sup>

Ontologically then, the theory proposed here acknowledges that ideas can both ‘[be] power resources used by self-interested actors’ and ‘give content to preferences and thus make action explicable’ (Blyth 2003: 702, see also Bleich 2003: 30–31). What matters is the sequence: Whereas ideas can be endogenous to the environment and to actors’ choices in the past, they can change from ideas to dispositions and thus become exogenous to strategic choices in the present. Sequencing our explanations, we can therefore be reductionist about ideas (turning to their origins to explain why ideas differed in the first place), while showing their explanatory power in the present.

## **Minority regions and immigration**

Two minority regions are at the centre of the analysis: the Spanish autonomous community of Catalonia and the Italian autonomous province of South Tyrol. Catalans are one of Spain’s historically recognized nationalities, whereas South Tyroleans are a legacy of the province’s Austro-Hungarian past, which ended when Italy took over the region after World War I.<sup>5</sup> The literature expects immigration to be a particular challenge for minority regions. They cannot control their own borders and immigrants have incentives to integrate into the mainstream, state-

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4 I am adopting Wittenberg’s (2015) conceptualization of legacy explanations as consisting of an historical antecedent, a contemporary outcome, and a mechanism of transmission connecting the antecedent to the outcome.

5 Chapters 2 and 5 will analyze in detail who is meant by ‘Catalans’ and ‘South Tyroleans’ and how the definition of these social identity categories has been influenced by the experience of internal migration in the first half of the 20<sup>th</sup> century. Nowadays, Catalan elites predominantly define Catalan identity on the basis of shared territory and the willingness to self-define as Catalan, while South Tyrolean identity is still predominantly constructed on the basis of shared descent from Imperial Austrian ancestors.

wide culture, rather than the minority culture and language (Hussain & Miller 2006; Kymlicka 2001; Zapata-Barrero 2007). If ideas can stabilize political responses to migration even under conditions where a political community lacks full state authority to define and maintain its own model of integration, we can expect to find even stronger evidence for the proposed mechanism of stabilization at the national level where the full repertoire of state power and institutions can perpetuate historical ideas of inclusion and exclusion. Aside from this methodological consideration, regions are also the relevant unit for studying many of the policies relevant to immigrant integration processes (Adam 2018: 262). As with many of the world's federal and regionalized democracies (Singh 2015: 17; Kleider 2018), Italian and Spanish regional authorities are responsible for social welfare, including education, health, and labour market policies. Decentralization of the Italian and Spanish welfare states allow for significant variation in regional welfare systems, and Catalonia and South Tyrol figure among the regions with the most developed welfare systems (Vampa 2016: 41, 100), giving them considerable—and comparable—scope to adapt these systems to the needs of immigrants.

At the same time, minority regions' concerns about identity and community make them politically similar to nation states. As Hooghe and Marks (2016) have argued, governance in minority regions is an expression of community, whereas in ordinary regions, it is a response to functional needs. From the perspective of legacy arguments, minority regions can be seen as 'very late late-comer nations'—social groups who make claims to self-government on the basis of their territory and exercise their authority thanks to decentralization, but do not (yet) constitute a state of their own. A general theory of the politics of migration, integration and

citizenship should be able to account for the policies decided by the political elites of any group with a shared, historically grounded 'national' identity—be it a nation state or an autonomous minority region.

Nonetheless, scholars have advanced arguments that account for specific attributes of minority regions in explaining their responses to immigration. Kymlicka (2001) argued that the crucial factor is whether immigration-related competencies are decentralized. Having the terms of migration set by their own elites is expected to reduce national minorities' fear that immigration will undermine their cultural distinctiveness, and lead them to adopt a 'post-ethnic nationalism' and multicultural policies. Conversely, Hepburn (2011) argues that devolving immigration-related competencies to the regional level polarizes the issue in regional party competition, setting incentives for more restrictive stances. A similar argument had already been made in older accounts of immigration and party competition in multilevel systems, independent of whether they are home to minority regions. Perlmutter (1996) argued that in federal systems, immigration is likely to affect regions unevenly, leading to diverse reactions of regional branches of national parties (Perlmutter 1996: 379, 382). On this account, decentralization does not necessarily lead to more restrictive positions, but may well motivate inclusive regional politics, depending on the distribution of costs and benefits between centre and region. In other words, the literature expects decentralization to influence how inclusive or exclusive minority regions will be towards immigrants, whether one sides with Kymlicka (2001), expecting an inclusive effect of decentralization on integration policies, with Hepburn (2011) in expecting an exclusive effect, or with Perlmutter (1996) in

expecting an interaction between decentralization and the spatial distribution of costs and benefits of immigration.<sup>6</sup>

## Empirical approach

The empirical approach of this book is designed to enable a precise differentiation between the historical conditions that constituted the original programmatic ideas related to immigration, and new material conditions that *fail* to produce change in policy choices, due to ideational stability. The research design therefore combines the inferential strengths of a comparison following Mill's method of difference to test the historical explanation against theoretically plausible alternatives, with process tracing at the within-case level to capture how ideas stabilize in the discursive frames and policy practices constitutive of ideational legacies. Given that ideas are at the centre of the analysis and that the contribution of this book lies in carefully delineating the mechanisms connecting historical causes to present outcomes, an in-depth qualitative comparative case study is the optimal methodological choice. In combining the strengths of cross-case analysis for the identification of causal effects and within-case analysis for the tracing of causal mechanisms, the research design follows Rohlfing's (2012) integrative framework for case studies and causal inference. Chapter 1 lays out the causal mechanism at the theoretical level (i.e. at the level of *types* of events). In concluding Chapter 7,

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6 Another argument is that minority nations have particular incentives to adopt an inclusive approach towards immigrants because this helps them to legitimize their nation-building project in the eyes of both international and internal audiences concerned about the exclusionary potential of nationalism (Arrighi de Casanova 2012). However, this argument predicts inclusive stances of minority nationalists across the board. It cannot explain variance in the migration stances of minority nationalist parties and in the policies adopted by governments of minority regions (for an overview on this variance, see Adam 2018). I will compare my empirical results to more recent findings from the literature on sub-state nationalism and migration in Chapter 7.

the theoretical mechanism is then complemented by event-history maps that represent causal relations at the level of the empirical units studied in time and space (i.e. at the *token* level). Combining theoretical causal models with event-history maps ensures that the process analysis is in line with Waldner's (2015) completeness standard. Tracing processes comparatively in both cases ensures the validity of causal inferences based on a counterfactual understanding of causation (Lyll 2015; Rohlfing & Zuber 2019).

Catalonia has been described as immigrant-friendly and inclusive in its regional conception of citizenship (Hepburn 2011) whereas South Tyrol's approach 'can rather be characterized by the acronym NIMBY (Not-In-My-Back-Yard)' (Medda-Windischer 2011: 28). This is most clearly seen in the differing fates of the two regions' anti-immigrant challenger parties. In South Tyrol, the radical right Freedom Party has successfully used anti-immigrant rhetoric to woo voters since the 1990s. In the 2013 election it gained 18% of votes and became the leader of the opposition and most important challenger to the governing South Tyrolean People's Party. In Catalonia, a small anti-immigrant party, the Platform for Catalonia (PxC), was founded in 2001 (Ros & Morales 2015: 135). However, it never reached a position from which it could have posed a real challenge to dominant Catalan parties. It first ran in the local elections of 2003 and obtained a total of five city councillors. By 2011, the party had 67 local councillors (Ros & Morales 2015: 135). In 2012, PxC contested its first regional election gaining a mere 1.7% of regional votes and no seat in the Catalan parliament. These differences raise the question why immigration can be politically exploited by the radical right in South Tyrol, whereas Catalan party competition proves rather immune to similar attempts.

The choice of cases locates this study within the broader context of immigration in Europe, thereby holding many contextual factors constant that might otherwise be responsible for these different politics of migration. Both Italy and Spain are member-states of the European Union, and therefore find themselves under the same supranational influence.<sup>7</sup> Within Europe, they are commonly grouped together with Portugal and Greece under a ‘Mediterranean model of immigration’ that is ‘characterized by a predominance of labour and family migration, a scarcity of asylum seekers, illegality as an endemic feature, and the combination of restrictive admission and citizenship policies with frequent amnesties’ (Doomernik & Bruquetas-Callejo 2016: 61). Italy and Spain used to be source countries of guest workers to northern Europe during the 1950s and 1960s. As of the mid-1980s, economic growth raised their own demand for immigrants who ‘were incorporated in low-status, low-paid jobs that natives tended to reject’ (Doomernik & Bruquetas-Callejo 2016: 62), often in the large informal economy. Both states are classified as having rather restrictive citizenship policies (Howard 2009: 28) and comparable immigrant integration policies according to the Migrant Integration Policy Index (MIPEX, Results 2010, Huddleston et al. 2015).<sup>8</sup>

In both countries, the adoption of national integration policies (Italy as of 1998, Spain as of 2000) lagged behind regional policymaking and thereby left considerable room for variance in the latter (Doomernik & Bruquetas-Callejo 2016:

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7 In the European Union, integration policies are coordinated through ‘soft’ law and through the conditions for accessing European integration funds to finance integration projects. Member states further cannot restrict the rights of third country nationals below the minimum guaranteed by European law (Doomernik & Bruquetas-Callejo 2016: 58).

8 Slight differences exist in integration outcomes. Differences in PISA scores between children of foreign-born parents and children of native-born parents are larger than the European average in Spain, but close to the European average in Italy; differences in the risk of unemployment are slightly larger than the European average in Spain, but lower than the European average in Italy (Cebolla-Boado & Finotelli 2015).

69; Zuber 2020; Chapter 3 of this book). The Italian constitution lists citizenship, immigration, the legal status of non-EU citizens, and the right to asylum as exclusive competencies of the Italian state, while defining education, social assistance, and health as concurrent (which implies that the regions legislate, but remain constrained by fundamental principles defined by the Italian state). Even before the 2001 reform of Title V of the constitution explicitly laid out the distribution of competencies in this area, regions had already been dealing with the social and economic integration of immigrants on a daily basis and in a bottom-up manner (Wilhelmi 2013: 14). The Italian state defined its own model of integration in the *Turco Napolitano Law* of March 1998 (Legge 40/1998). Italian commentators agree that the *Testo Unico* (Decreto 286/1998), which implemented the *Turco Napolitano Law* in July 1998, established a minimum level of civil and social rights for immigrants which regions could not restrict, but only improve upon (Wilhelmi 2013: 17). The *Testo Unico* also explicitly tasked regions with designing their own integration policies (Attanasio 2009). Regions were expected to develop legislation on health, education, housing, reception centres, participation in public life, and anti-discrimination.

The distribution of competencies in Spain closely mirrors the Italian case. The Spanish constitution assigns exclusive legislative and executive competency over citizenship, immigration, emigration, alien affairs, and asylum to the Spanish state. Since the mid-1990s, the Spanish autonomous communities have been dealing with immigrant integration in a bottom-up manner and on a day-to-day basis, given that the incorporation of migrants into the host society naturally touched upon areas such as social policy that already lay within their jurisdiction. When the most recent Catalan (2006) and Andalusian (2007) autonomy statutes listed integration policy

as a prerogative of regional authorities, observers of constitutional law deemed that this merely made explicit an already ‘existing and accepted practice’, thereby ‘adapting the model of territorial decentralization to actual reality’ (Wilhelmi 2013: 12). Both South Tyrol and Catalonia can thus define their own policy priorities in the area of immigrant integration.<sup>9</sup>

The *lower temporal bound* of the case studies is given by the early experience with internal migration dating back to the 1920s. Theoretically, there could be older historical antecedents—migration processes have happened throughout human history. But the secondary literature on processes of internal migration makes clear that these events were unprecedented in scale and in the transformative impact they had on the two minority communities—never before had history brought such a sudden and massive arrival of cultural ‘others’ who did not speak the minority (or a closely related) language. Furthermore, none of my interview partners referred to earlier historical events, nor were they reactivated in political discourse about immigration.

The *upper temporal bound* is set by the adoption of a regional integration law in South Tyrol in October 2011 and in Catalonia in May 2010. The adoption of binding legislation following political debate in regional parliaments can be seen as the clearest observation we can make about each region’s political response to contemporary immigration. However, I will also give a brief overview of developments between 2010/11 and 2020 in Chapter 3.

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<sup>9</sup> Chapter 4 includes a detailed discussion of further similarities and differences between the regions when testing the ideational argument against alternative demographic, economic and institutional explanations.

Ideas have to be carefully reconstructed from political discourse and policy practice. To collect data, field research was therefore conducted in both regions (in South Tyrol: 6 January–8 March 2014, and 7–14 March 2015, and in Catalonia: 1 May–2 July 2014).<sup>10</sup> Data collection included the following steps: 1) secondary material search on immigration and integration policies, and on the regional and national political and administrative context; 2) primary source collection including regional policy documents, protocols of parliamentary debates, regional party manifestos, and immigration– and integration-related publications of regional governments; 3) background interviews with immigration experts from academia, research institutions, and policy think-tanks; 4) semi-structured interviews with officials at the administrative level, chosen for their previous or current experience in working in the areas of immigration and integration; 5) semi-structured interviews with officials at the political level (including both members of government and members of opposition parties, past and present); 6) semi-structured interviews with members of immigrant representative bodies. All interviews were conducted face-to-face by me in German, Italian, or Spanish and lasted between 30 minutes and 1 hour.<sup>11</sup> A full list of interviews conducted and interview guidelines can be found in Appendix A.1 and A.2.

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10 An important difference is that I lived and worked in Barcelona for the whole 2013/2014 academic year. This could have led to a more profound understanding of the Catalan over the South Tyrolean case, and introduces the risk of ‘insider’ biases. To counteract this tendency, I specifically sought out interview partners from opposition parties and tried to remain particularly open to evidence that disconfirmed Catalonia’s inclusive tendencies and South Tyrol’s exclusive tendencies. I present such pieces of evidence throughout the analysis.

11 German interviews were then transcribed by me, while Italian and Spanish native speakers transcribed the interviews in those languages. All interview partners gave their written consent to use the interview in academic publications, including direct quotes. Interview partners cited with their real names gave written consent to have their names published. In case interview partners wished to be anonymized, their organizational function is provided instead.

## Structure of the book

**Chapter 1** develops the theory of ideational policy stabilization. It explicates how historical events can come to influence contemporary political choices. Ideational stabilization is ensured on the one hand through discursive consensus at the political level, and on the other hand through policy practices within the bureaucracy.

**Chapters 2 to 6** constitute the empirical part of the book. **Chapter 2** characterizes the nature of political conflict over immigration through detailed analysis of the patterns of party competition and the discursive frames used in the parliamentary debates about immigration in the two contexts. This reveals which frames are dominantly used to talk about immigration, whether cooperation or contest dominate the interaction among political parties, and to what extent actors resort to historical ideas when they frame immigration as a political issue. I show that the framing contest on immigration is still open in South Tyrol, but closed in Catalonia, where discursive consensus ensures the stability of inclusive ideas.

**Chapter 3** turns from party politics to binding legislation and adds an analysis of the content of integration laws in both regions. This highlights the extent to which ideas are reflected in substantive policy choices. Applying fine-grained categories that allow for the systematic classification of integration policies in a socioeconomic, a political–legal, and a cultural–religious domain, this analysis follows Adam’s (2018: 264–265) call to move the analysis of sub-state policies beyond overly simplistic categories. The chapter includes the integration policies of other Spanish and Italian regions to identify the specific political concerns pertinent to minority regions, but not to ordinary regions.

**Chapter 4** assesses the causes of the regions' varying responses to immigration. The comparison identifies the political economy of internal migration from the south of the respective countries as the cause of difference in contemporary political responses to international migration; it also shows that alternative theories seeking causes in contemporary economic and institutional incentives have no explanatory power.

**Chapters 5 and 6** trace the discursive (Chapter 5) and the practical (Chapter 6) stabilization of ideas, from early migration experiences to contemporary policy choices, in detail. In this comparative process tracing, I show how Catalan elites originally forged consensus around the idea of immigration as an opportunity. As significant numbers of immigrants began to arrive from abroad during the early 2000s, circumstances differed considerably from those during the first half of the 20<sup>th</sup> century when the host–stranger relation was first experienced. Yet, the chapters show that elite discourse and administrative practices of integration were simply reactivated when international immigrants began to arrive. I contrast the complete stabilization in Catalonia, where an inclusive idea of *integration* became closely connected to the very definition of Catalan national identity, with the case of South Tyrol, where discursive consensus did not include the opposition, and where, as a consequence, ideational stabilization of an original idea of *ethnic separation* remained incomplete.

**Chapter 7** concludes the book with a discussion of the generalizability of its arguments and the practical implications of its findings. First, the legacy explanation is probed in relation to other minority regions in Europe. Second, the chapter discusses broader insights for comparative public policy and migration

studies, inter alia by calling for closer examination of the connection between internal migration, nation building, and citizenship at a time when the most significant migration processes are occurring within countries like China and India, rather than across international borders (Bell et al. 2015).

# Chapter 1. A theory of ideational policy

## stabilization

*One could even say that ideas can make history, but not just as they please, and only under circumstances found, given, and transmitted.*

Sheri Berman (2001: 236)

In the democratic marketplace of ideas, politicians compete for support by putting forward policy answers to societal challenges (Robertson 1976). In so doing, they define which problems are at stake, set goals to be achieved and justify which concrete courses of action are most appropriate for achieving the goals. Peter Hall (1989) famously labelled this *triad* of problem definition, policy goals, and policy instruments a ‘policy paradigm’. Policy paradigms can be defined as programmatic beliefs around a particular policy area—such as immigration, education, or economic policy (Berman 1998: 21; Hansen & King 2001: 238). In the world of ideas, policy paradigms occupy an intermediate level of complexity between atomistic policy positions (e.g. the belief that refugees should receive insurance cards so they can access health care) and the large systems of interconnected ideas that constitute political ideologies (*ibid.*). Since ideas are located in the minds of actors, they need to be communicated in order to mobilize support and help build coalitions around a suggested course of action. This is the role played by discourse. In discourse, political elites transmit ideas to each other, and to the public (Schmidt 2010).

So far, this description of politics as a discursive contest of programmatic ideas is rather uncontroversial. Controversy arises in explaining eventual choices in favour of one policy over another. Are these choices ultimately reducible to material features of the choice situation? Or do ideas themselves cause such choices, and have explanatory relevance in their own right?

A number of scholars have shown that actors' ideas have explanatory power for *policy change* (e.g. Béland 2005; Blyth 2002; Hay 2006; Schmidt 2010), but the role of ideas in maintaining *policy stability* is less explored (cf. Blyth et al. 2016). This chapter develops a theory of ideational policy stabilization to reveal one of the possible mechanisms behind such stability. The theory applies to the particular subset of policy choices that cannot be explained using present institutional and economic incentives, but that appear to match the incentives of an historical event or period instead. This specification is important. Many instances of policy stability can be readily explained with reference to stable structural conditions, or institutional path dependency (i.e. by pointing to the increasing returns that a once-chosen solution yields over time, Pierson 2000). The theory of ideational stabilization instead applies to those instances of stability in which a policy paradigm survives even in the face of economic and institutional change. In this new account, ideas *are* reducible to the features of an earlier choice situation in which a policy problem first arose, but nonetheless *cause* later choices in the same policy area—later choices that do not correspond to incentives supported by that later situation. The theory thereby explicates the mechanism behind so-called 'historical legacy explanations': explanations that link a contemporary outcome that cannot be explained by contemporary factors to an historical cause (the antecedent) that has ceased to exert a direct effect on the outcome, and that specify a

mechanism of transmission (in order to make sense of the legacy's persistence) (Wittenberg 2015).

I first build the micro-foundation for the theory by drawing on Chong's (2000) model of choice as a result of incentives and dispositions. Incentives are inherent to the choice situation and define the costs and benefits associated with each possible outcome. They interact with our dispositions—more general orientations shaped by values, norms, and social identities. Unlike incentives, dispositions are not inherent to the choice situation. They can incline us to choose one alternative over another independent of its costs and benefits. Building on this foundation, I argue that, from the snap-shot perspective of a single choice situation, discursive ideas can only influence choice by heightening the salience of some incentives over others, or by heightening the salience of some dispositions over others. In the long run, however, ideas can change the very repertoire of *societal* dispositions (*collective* identities and *shared* values) that can be activated in relation to a policy problem. I model the mechanism through which ideas change the repertoire of societal dispositions as consisting of two mutually reinforcing parts: discursive consensus that political elites build and maintain around a dominant policy idea, and stable organizational routines that reinforce that idea at the practical level of policy implementation. Through discursive consensus and policy practice, policy ideas of the past can come to be inscribed into the dispositional repertoire of values and identities associated with the policy problem. Integrated into the repertoire of dispositions, ideas that resonated with incentives of the past can then influence policy choice in analogous future situations. Having laid out the theory at a general level, I then explore the conditions under which it is likely to apply or not apply to

various policy areas. The chapter closes with a discussion of how such ideational legacies can be empirically analysed.

## **Incentives, dispositions, and ideas**

Dissatisfied with the inability of standard rational models to account for the influence of values and group identities on political choice, Chong (2000) develops a model in which choice is the result of a combination of incentives and dispositions. ‘Partly pushed by internal predispositions and partly pulled by the costs and benefits of the options they face’ (2000: 7), actors in this model are still rational in that they ‘choose the best available means to achieve what they understand to be in their interest’ (2000: 12). However, their understanding of what is in their interest is not only informed by the incentives characterizing the current situation, but also by more long-standing dispositions. He understands incentives broadly, arguing that they can be both material and social. Social incentives are the status rewards we hope to gain if we conform to social norms. Dispositions consist of values, norms, and social identities acquired during socialization—for example, one’s partisan or ideological orientation. The important advantage of using this account to explicate legacies is that it combines a dynamic element (the specific incentives inherent to a given choice situation) with the more stable dispositional component of general orientations.<sup>12</sup> The relative stability of dispositions

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12 A further advantage is that Chong’s model aligns well with one of the most prominent general psychological accounts of human behaviour: the reasoned action approach (Fishbein & Ajzen 2010). Berman’s earlier work (1998) suggested the reasoned action approach as a possible micro-foundation for ideational causation. At a general psychological level, the two models are equivalent in that they both see choice as a result of beliefs about costs and benefits on the one hand, and beliefs about values and norms on the other hand. However, I prefer to use Chong’s model because it better accounts for the specific characteristics of political choices that concern social groups characterized by context-bound values and identities.

compared to incentives does not imply that they are static. Chong also makes clear that dispositions do not remain salient by themselves, but need to be periodically enforced (2000: 58). This point is important because it shows that ideas communicated in discourse can enforce, but also silence, dispositions.

Politics is not about individuals contemplating policy alternatives in isolation. Politics is about contestation, persuasion, and public choice. If mobilization in favour of a policy option is to be successful, it has to unite a group of actors that is large enough to effect (or block) policy change. In politics, different actors defend different ideas, and the ideas of some need to affect the choices of others. This is particularly relevant for legacy explanations since the decision-makers who were exposed to the incentives of the past are never identical to those making choices in the present. The micro-model therefore needs to be rescaled to the societal level where the relationship between ideas communicated in discourse, incentives supported by a given policy problem, and the repertoire of dispositions shared among societal groups, or, in the most stable case, even among society as a whole is at stake. In principle, imagination allows political elites to come up with any possible problem definition, policy goal, and suggested course of action. But the extent to which such policy ideas can resonate and gather support is ultimately limited by the repertoire of incentives (economic and institutional) and the repertoire of dispositions. So, while ideas are not causally dependent on either incentives or dispositions (nor a combination thereof), their success in mobilizing support for policy change is.<sup>13</sup>

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<sup>13</sup> For arguments that ideas that align with interests, institutions, and their ideological (here dispositional) environment are more likely to dominate political debates and policy choices, see Berman (2001: 235–236) and Hansen & King (2001). Further, Cruz (2000) argues that cultural repertoires limit the degree of flexibility enjoyed by political entrepreneurs when re-

For example, liberalizing European migration policy could hypothetically be defended with reference to the norms and values of China's Ming dynasty, but this is unlikely to be very persuasive—in Cruz' (2000: 281) terminology, we might say that such a discursive strategy has ventured outside the 'collective field of imaginable possibilities'. In order to become dominant, ideas need to either tap into the repertoire of incentives or tap into the repertoire of norms, values, and group identities. Discursively powerful ideas often tap into both, or rhetorically connect incentives to identities, for example by arguing that 'as a nation of immigrants (disposition), we have always benefited from the skills and innovative ideas immigrants bring to our economy (incentives) and therefore need to liberalize access to citizenship (policy)'. At a given point in time, in a particular choice situation, the situational repertoire of incentives and the societal repertoire of dispositions thus restricts the possible set of ideas that have the potential to resonate and lead to policy choice. The basic model can incorporate both materially reductionist classical rational choice explanations as well as classical norm-based sociological explanations as special cases. The former would simply set the influence of dispositions to zero, the latter the influence of incentives.

But even at a single point in time, there is an important way in which ideas communicated in discourse can influence the conditions of their own resonance: they can selectively emphasize some incentives and dispositions over others, thereby shaping their relative salience. The literature on framing in the field of political communication has extensively theorized and tested how the selective

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defining the meaning of collective identity, and Culpepper (2008) shows that once institutional crises open up space for ideational contestation over wage bargaining, ideas that tap into the interests of employers and workers are likely to prevail and stabilize.

emphasis of particular considerations influences political attitudes and behaviour (Chong & Druckman 2007; Druckman 2011). When defined as dimensions of consideration (Druckman 2011), frames can be seen as components, but not the entirety, of a policy idea.<sup>14</sup> Frames are only concerned with the first element, namely the way in which a policy problem is defined. The framing approach is also agnostic as to whether dimensions of evaluation are related to material incentives, or whether they are related to values, norms, or identities. Nonetheless, framing effects can very well explicate how ideas communicated in discourse influence how other elites and the public perceive a given problem, and how certain incentives or dispositions come to dominate policy decisions.

The literature on policy ideas differentiates ideas as beliefs from ideas in discourse. Analogously, the literature on framing differentiates frames in thought from frames in communication. A *frame in thought* is made up of the dimensions that matter for how an individual evaluates an object (such as immigration). It is a subset of all the possible considerations that could, in principle, be brought to bear when evaluating the object. A frame in thought can consist of just one dimension, or several dimensions of consideration. A *frame in communication* is ‘a statement that places clear emphasis on particular considerations’ (Druckman 2011: 283). For example, Paul might evaluate immigration solely in terms of whether it is good for the economy, whereas Nina thinks that immigration is good for the economy, but also considers that it might pose a security threat and undermine the cultural identity of the host society. Both Paul and Nina evaluate immigration on attributes they

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<sup>14</sup> There are many different definitions of frames in the literature on political communication, some of which are broader than that used by Druckman and co-authors (e.g. Entman 1993). I draw on Druckman’s definition because he proposes a very clear micro-level model of framing effects that can inform arguments about ideational influence.

ascribe to it; Paul evaluates immigration on only one dimension ('being good for the economy') while Nina ascribes attributes along three dimensions ('being good for the economy', 'posing a security threat', 'undermining cultural norms'). Each of these attributes carries a certain weight. The sum of the weighted evaluations explains Paul's and Nina's attitudes towards immigration.<sup>15</sup> We speak of framing effects when frames in communication influence frames in thought. To stick to the example, if we expose Nina to security framing, the salience weight of the security dimension (where she ascribes a negative attribute to immigration) rises relative to the economic dimension (where she ascribes a positive attribute to immigration). This might lead her to have a more negative attitude. This insight into the framing literature shows that political elites can make others more receptive to certain ideas simply by changing the frames of reference, even though the underlying set of incentives and the repertoire of dispositions remains unchanged. Even at a single point in time, ideas can thus influence choice as they can increase or decrease the relative salience of specific incentives and dispositions at the expense of others.

## **Ideational stabilization: discursive consensus and policy practice**

We now move from a single instance of policy choice to a dynamic perspective, looking at a sequence of choices in a given policy area. For each of these decisions, the set of incentives arises anew from the exogenous, material features of each choice situation—as the environment changes, the repertoire of incentives changes as well. The more interesting part of a sequential perspective is that ideas that

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<sup>15</sup> Chong and Druckman (2007) draw here on the expectancy value model of attitudes, which also constitutes part of the theory of reasoned action (Fishbein & Ajzen 2010).

tapped into the repertoire of incentives and dispositions in the first-choice situation can, themselves, circumscribe the repertoire of societal dispositions in future-choice situations. The mechanism of ideational stabilization has two constitutive parts that, once in place, reinforce each other. First, ideas stabilize as political elites build and maintain discursive consensus around them. Second, once discursive consensus has initially been achieved, ideas stabilize further as they become integrated into bureaucrats' routines and practices of policy implementation.

Both the literature on ideas and the literature on framing agree that discursive consensus helps some ideas to dominate others in relation to a policy problem (see Table 1.1). The literature on ideas has focused more on the capacities of *actors* that put forward ideas, arguing that ideas become dominant over time if powerful, politically long-standing 'carriers', in a good institutional position to make their voices heard, can build consensus around them (Berman 2001: 235–236; Hansen & King 2001). An exception is Culpepper (2008), who shows, in the context of collective wage bargaining, that consensus will most easily be formed around those economic ideas that are analytically sound and offer potential distributive benefits to both employers and workers. The framing literature has largely ignored the actors' characteristics, but has equally emphasized the importance of discursive consensus for the stabilization of dominant frames. This is because the less the public is exposed to competing policy paradigms, the more a particular subject begins to elicit routine considerations (Chong & Druckman 2007: 108). Once there is agreement on how to construe a problem, consensus takes on a self-reinforcing dynamic because past use and frequent use are both known to strengthen frames (Baumgartner, de Boef & Boydston 2008).

Table 1.1 Attributes conducive to strength and stabilization of ideas

		Ideas literature	Framing literature
Attributes of carrier	Conducive to strength	powerful, politically long-standing, good institutional position	<i>not theorized</i>
	Conducive to stabilization	manages to build consensus	<i>not theorized</i>
Attributes of ideas	Conducive to strength	aligned with interests, fits ideological and institutional environment, offers distributive benefits to all sides of a conflict	evokes cultural values, is used frequently, was used in the past
	Conducive to stabilization	<i>not theorized</i>	self-reinforcement (as frequency and past use cumulate over time)

Source: Own compilation, drawing on Baumgartner et al. (2008); Berman (2001); Culpepper (2008); Hansen and King (2001); Chong and Druckman (2007); Druckman (2011).

This implies that the more encompassing the discursive consensus is among political elites, the more likely a policy idea will be to become dominant and stabilize into a disposition. Political actors can actively work towards making consensus encompassing in two ways: First, they can argue that the solution works to the benefit of society as a whole, or the major contending societal groups affected by the policy in question (Culpepper 2008), thereby promoting consensus on the basis of incentives. However, this argument only works to maintain discursive consensus as long as all involved maintain a hope of reaping these benefits, failing in the face of economic and institutional change. A second strategy is to actively connect a policy idea to an overarching definition of collective identity

and shared values, thereby promoting consensus on the basis of dispositions widely shared across society. The latter strategy has so far been largely overlooked by the ideas and framing literatures (although the latter has shown that frames that evoke long-standing cultural values tend to be particularly persuasive, see Druckman 2011). I argue that forging rhetorical links between a policy idea and an encompassing conception of identity is necessary to inscribe an idea fully into the repertoire of societal dispositions. In order to survive in the face of economic and institutional change, ideas need to transition from being mutually agreeable based on incentives to being mutually agreeable based on inter-subjectively-shared values and identities.

Once consensus has been established and rhetorical connections have been forged between an original policy idea and definitions of an overarching collective (ideally national) identity and its core values, political elites at a later point in time thus have difficulty in treating it as a new issue. On the one hand, they are constrained by the self-reinforcing technical effects of the past and frequent use of frames (where these effects accumulate over time). On the other hand, they are constrained by the substantive consensus built by original carriers around the particular content of their ideas (that a particular approach is part and parcel of a national identity and collective values). This makes it difficult to argue against the dominant paradigm without presenting oneself as standing against the very nature of collective national identity itself. Achieving consensus at the level of political discourse for a certain period of time exposes the public to a dominant vision of what immigration, education, or social welfare means for society, thereby connecting ideas about how to deal with a given policy problem effectively to more long-standing dispositions.

Discursive stability is not, of course, deterministic. Political actors will contest discursive consensus as economic or institutional incentives change and new potential payoffs come to be associated with policy change. New political elites or those disadvantaged by previous policies will seek to strategically employ new ideas to gain or sway public support for new policies. Potential access points for contesting discursive policy consensus are twofold: First, elites can emphasize the *new incentives* supported by a change in the environment, which puts prior policy solutions under strain. For example, an economic crisis might open up a space for ideational contests to take place over the adequate mode of collective wage bargaining (Culpepper 2008) or how to best manage the economy as a whole (Blyth 2002). Dominant policy paradigms can then be contested by highlighting that the dominant ideas and practices no longer correspond to the objective characteristics of the problem at hand. Second, elites can exploit *cross-pressures* that often exist in the repertoire of *dispositions* at the societal level (cf. Cruz 2000: 280). For example, in the US, the self-image as a ‘nation of immigrants’ conflicts with a disposition for racist and ethnocentric exclusion. President Donald Trump, during his electoral campaign, connected the latter disposition to appeals to the incentive-based logic of status concerns among white voters (Bobo 2017), thereby challenging the former disposition of ‘a nation of immigrants’.

Political elites and their dominant programmatic ideas do not only shape political discourse; they also shape processes of policy implementation. As particular courses of action are decided, they need to be implemented at the level of public administration. The second part of the mechanism through which ideas stabilize over time is thus via the routines of bureaucrats. At this level, ideas are neither beliefs nor discursive frames. They are organizational identities and practices. The

literature on institutional isomorphism can help explain how institutional identities and practices stabilize ideas (DiMaggio & Powell 1983; Meyer & Rowan 1977). According to this literature, institutions reflect the social realities (including dominant norms and values) that surround them, rather than representing the most rational and efficient response to societal challenges.<sup>16</sup> In this literature, institutions are understood in the broad sociological sense, and include not only formal rules but also policy routines and practices (Meyer & Rowan 1977: 341). Importantly, institutional isomorphism is an adaptive process (not a consciously engineered one) that helps the institution to resist short-term changes. Resting on societal values makes an organization adaptive to larger societal value change, but resistant to short-term reforms informed solely by the principle of efficient design.

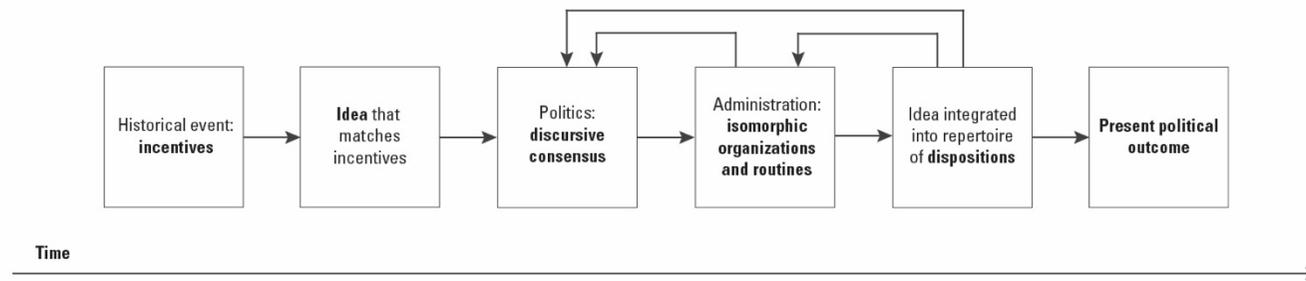
Although institutional isomorphism theory explains the emergence and change of organizations per se, it can be writ smaller to understand the institutionalization of policy routines in a given policy area. As a particular idea becomes discursively institutionalized, agencies are set up as part of the public administration to deal with the issue. Most importantly, they are set up in a way that reflects the dominant values that surround them. This allows ideas to persist in policy practice, despite changes in the rational incentives that might call for adaptation. In Chong's (2000) terminology, we could say that bureaucratic organizations set up under a dominant, consensual policy paradigm will themselves end up having a disposition.

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16 This picks up a classic distinction by Selznick ([1957] 1966: 5) who argued that at the point where an organization adapts to social pressures, it ceases to be a mere organization ('an expendable tool, a rational instrument engineered to do a job') and becomes an institution ('a natural product of social needs and pressures—a responsive adaptive mechanism').

Based on these foundations, a complete ideational legacy explanation connecting past incentives to present choices reads as follows: the material incentives of an original, transformative event that brought a particular policy problem to the table lead political elites to privilege certain ideas over others when talking about the issue in question and suggesting courses of action in the present. It is of course possible that dispositions also play a role in this initial situation. But if this policy problem is truly unprecedented, incentives are likely to prevail in the contest of ideas, simply because there is no previous history suggesting how to interpret this event in terms of societal values and identities. Whether this idea stabilizes then depends on whether elites succeed in building encompassing discursive political consensus around it in which they connect the idea to shared identity and values. Political consensus in turn fosters institutional isomorphism as administrative routines and practices begin to reflect dominant policy ideas. Although ideas may have originally been flexibly held beliefs, reinforcement in discourse and practice helps them to acquire the status of stable societal dispositions. This contributes to defining the identity of the political community and its values regarding the particular policy problem at hand (e.g. as a ‘nation of settlers, capable of integrating newcomers’, or as a ‘secular nation, proud of having banned the church from influencing politics’). At a later time, when the same problem is confronted again, it is no longer perceived as a new issue. Former ideas enter political choice as part of the societal dispositions associated with this policy area; previous ideas are either still in place or can be easily reactivated in political discourse and policy practice. Figure 1.1 represents this theoretical mechanism.

Figure 1.1 Theoretical mechanism connecting past incentives to present outcomes



The causal arrows in figure 1.1 emphasize that discursive consensus, institutional isomorphism, and the integration of ideas into the repertoire of dispositions are not one-off events, but constitutive parts of a mutual reinforcement mechanism through which material conditions of the past are perpetuated, influencing political choices of the present. Initially, discursive consensus is a cause for the development of stable administrative routines, since it shields the administration from politicization and enables the initial development of stable practices and routines. Once discursive consensus and administrative routines are in place, however, they mutually reinforce each other. The complete theory of ideational stabilization then shows how ideas, that were originally caused by the material incentives of an historical event, turn into dispositions over time, and thus come to influence contemporary political dynamics and policy choice. This successfully delineates the theoretical mechanism behind historical legacy arguments, which are popularly invoked in research on integration and citizenship policy.

The theory also provides a unified framework for several of the most recent advances in ideational theory—covering topics as diverse as pensions, hate speech, or economic adjustment—that have so far remained unconnected: Jacobs’ (2009) suggestion to treat ideas as mental models, Bleich’s (2018) model of ideational salience amplification, and Vail’s (2018) account of the long-term influence of ideational traditions. Jacobs (2009) links the concept of an idea to the concept of the *mental model* used in psychological research. A mental model is ‘a simplified representation of a domain or situation with moving parts that allow reasoning about cause and effect, sometimes by analogy’ (Jacobs 2009: 257). Jacobs’ insight is that pre-existing mental models narrow the spectrum of possible options an actor will consider, guiding attention toward some, and away from other, lines of

reasoning and evidence. This contradicts a purely rational model, in which all alternatives would be considered on an equal basis in terms of their probability and utility. This is precisely the role that disposition plays at the micro level of a single individual confronted with a particular situation.

Bleich (2018) is concerned with how elites employ ideas in societal discourse to affect change, arguing that elites can trigger change by amplifying the salience of some ideas from among ‘a latent distribution of ideas’, instead of entirely replacing old with new ideas. His empirical analysis shows actors to persuade others by amplifying the salience of some *norms* over others. In the framework presented here, Bleich’s account of ideational salience amplification thus shows how ideas affect policy change by emphasizing some dispositions (specifically norms) over others at the level of discursive contestation.

Vail (2018) argues that nationally and historically situated ideational traditions inform how contemporary elites interpret new policy problems, and make some policy responses seem more appropriate than others. While eschewing the question of where these ideational traditions came from in the first place, this account fits well with the view that as traditions, ideas can stabilize into forming part of the repertoire of dispositions.

## **Ideational stabilization across policy areas**

It follows from this exposition of the theoretical mechanism that two conditions should affect the likelihood of ideational stabilization across different policy areas: first, the importance of dispositions relative to incentives, and second, the tightness of the link between policy ideas and conceptions of collective, in particular

national, identity. With regard to the first condition, Table 1.2. differentiates three hypothetical scenarios. In the first scenario, a policy area has, by virtue of the matters it addresses, more immediate connections to norms, values, and identities than it does to cost-benefit calculations. In the second scenario, both dispositions and material incentives are relevant to a policy problem. In the third scenario, the issues addressed have more direct connections to considerations of costs and benefits than to dispositions.

Table 1.2 Relative importance of dispositions and incentives

	<b>Scenario 1</b>	<b>Scenario 2</b>	<b>Scenario 3</b>
Importance of dispositions and incentives	D > I	D = I	D < I
Likelihood of ideational stabilization	High	Intermediate	Low

The second condition concerns the connection between a policy problem and collective identity. I have argued above that discursive consensus is crucial in order for policy ideas to become dispositions, and that stabilization works by building consensus and connecting a policy idea to a collective identity and set of values. It follows, then, that the greater the scope of a particular identity group (i.e. the more people identify with it), the higher the political cost of defecting from the consensus will be, and the less likely the ideational legacy is to be overturned. Once a policy idea has become connected to an overarching identity category, defectors can be portrayed as arguing against the identity group itself—and in the case of the national political community as a whole, those who argue against the consensus may be seen as arguing against the very self-conception of the nation. In other

words, the more overarching the identity category to which the policy idea is connected, and the more broadly shared the values invoked to justify a given policy idea, the better the chances for discursive consensus and, hence, ideational stabilization. Connecting policy ideas to the very conception of national identity should thus make stabilization comparatively more likely than connections to the identities of sub-groups in the society. Conversely, even long-standing legacies begin to crumble if there are changes to the dominant conception of national identity and the nation's core values, along with changes in incentives.

Given that political elites can selectively emphasize some incentives and dispositions over others, and can also deliberately forge discursive links between policy ideas and images of national identity, the chances of a policy idea stabilizing into a disposition is ultimately context-dependent, and cannot be predicted with certainty.

Having said that, some policy areas seem intrinsically more sensitive to incentives, dispositions, or both. For example, economic policy has a connection to budgets and taxes which makes it easy to connect policy options to cost-benefit considerations (though ideas and dispositions also play a crucial role in this policy area, cf. Blythe 2002; Hall 1989; Vail 2018). On the other hand, morality policies related to abortion or same-sex unions, for example, are, by definition, about values (Knill 2013). The policy area of integration and citizenship, which lies at the core of this book, can tend to be connected to both dispositions and incentives. On the disposition side, connections to national identity are obvious because these policies regulate who can become a member of the political community and under which conditions: 'The question of integration, i.e. who needs to be integrated into

what and how, refers to the core of self-perception and self-identification of societies that are at the destination of persisting migration movements towards Europe' (Borkert & Caponio 2010: 10). Ideational stabilization via dispositions can thus, *prima facie*, be expected to play a more important role for integration and citizenship policies, than for policy areas less obviously concerned with the boundaries of the social and political community. This expectation is confirmed by the particular popularity of legacy explanations in migration research, as outlined in the introductory chapter of this book. On the other hand, migration, integration and citizenship are *also* traditionally discussed in terms of the expected costs and benefits that newcomers bring to the society. This policy area is therefore a particularly interesting case for the theory of ideational stabilization. Migration, integration and citizenship policies are directly concerned with definitions of national identity while subjected to more dynamically changing incentives. This tension allows us to investigate the entire mechanism by which ideas stabilize historical incentives into long-standing dispositions.

## **Empirical implications and methodological considerations**

The most interesting constellation for empirically testing ideational explanations arises when ideas lead to behaviour that is at odds with the expected utilities and probabilities assigned to possible outcomes. This is why Berman (2001) and Jacobs (2015) recommend testing ideational theories by focusing either on stable choices, given changing rational incentives (we should then find ideational stability to be the key explanation), or on different choices, given stable rational incentives (we should then find ideational variance). Even if we come across a case where ideas are

needed to account for actors' choices, this does not of course imply that the idea itself is irreducible to actors' original rational calculations (Jacobs 2015: 44, note 2). Ideas can start as mere channels for interests, but subsequently become explanatory factors in their own right, if they can account for policy stability in light of changing incentive structures, or policy change in light of stable incentive structures. An empirical analysis of ideational legacies then has to show both that ideas matching the incentives of the past can indeed account for policy choices of the present, and that the present choice cannot be explained by the (economic or institutional) incentives of the present situation alone.

To achieve these goals, the causal analysis of ideational legacies has to proceed in two steps, further explicated in this book's chapters on causal identification (Chapters 4–6). First, one has to show that contemporary choice corresponds with the parameters characterizing the historical antecedent, but not with those characterizing the contemporary situation. A classical paired comparison following the logic of Mill's method of difference can serve this purpose well (Tarrow 2010). It allows for the control of contemporary factors and focuses on the divergent past experiences. It also satisfies Berman's requirement to choose a 'set of cases in which the outcomes to be explained vary and the relevant political actors are matched in everything except the ideas or cultural beliefs they hold' (Berman 2001: 243). In the empirical analysis in this book, the comparison is designed to rule out conventional explanations for political responses to immigration based on economic interests or institutional incentives. Explicitly taking into account interests and institutions as alternative explanations has a further advantage: it avoids problems affecting studies that focus only on ideas, or interests of

institutions. The latter cannot assess the causal contribution that interests, ideas and institutions are making *compared* to each other (compare Walsh 2000: 288).

Second, whereas the cross-case comparison allows for the causal inference that the past matters, process tracing still needs to show *how* it occurs, making a plausible case for how temporally distant causes have come to influence present choices. The goal is to reveal how original ideas stabilize through discursive consensus and isomorphic policy practice. Process tracing is also particularly powerful at probing ideational explanations because it can show that the entire decision-making trajectory is consistent and connected to particular ideas, despite changes in the socioeconomic parameters over time, thereby allowing one to distinguish ideational and material effects (Berman 1998: 34, 36; Jacobs 2015: 41).

In the present analysis, the two process-tracing chapters focus first on the Catalan case, where we find the full mechanism of ideational stabilization in place. The analysis then provides the contrasting South Tyrolean case, where stabilization has remained incomplete: elites preserved the memory of migration as a threat in their discourse. But discursive consensus around a programmatic policy idea of separation failed to include the opposition. Answering to internal migration with a paradigm of ethnic separation was always contested by some political parties and was never consistently applied to international immigration. Drawing on a most similar case, where the original historical event did *not* lead to a complete stabilization of a programmatic idea elucidates which steps in the chain of events are causally relevant based on an understanding of causation as counterfactual dependence (Lyall 2015; Rohlfing & Zuber 2019).

A pertinent problem in process-tracing studies is to avoid an infinite regress in searching for ever more fine-grained links between cause and outcome (King et al. 1994: 86). In working with historical legacy explanations, this challenge is aggravated by yet another possibly infinite regress: the search for the original historical cause. Which historical event is the causally relevant event, then? From the methodological perspective of a counterfactual understanding of causation, the relevant historical event is the one that made a difference to the outcome—a difference that would not otherwise have come about (Rohlfing & Zuber 2019). Therefore, one has to think about the values of the outcome before and after the historical event (which can be seen as the treatment) and compare them to the values in a most similar case that did not experience the treatment. From a practical perspective, gathering information on pre- and post-treatment values for a range of potentially relevant causal events, faced with the dearth or difficult accessibility of historical data, poses a huge challenge. Fortunately, ideational legacies can only function if they are accessible in the memory and value repertoire of decision-makers. This implies that they can be reconstructed by the analyst from how officials use the past to interpret the present (Kubik 2003; Vail 2018). Historical events that elites with decision-making power do not remember and/or actively refer to may influence the present as direct, material (e.g. institutional) legacies, but they certainly cannot influence contemporary politics in an ideational way. Provided that material incentives have been successfully ruled out, one can therefore limit the search for patterns of counterfactual dependence between historical cause and outcome to those events which actors connect to the present situation in their political discourse.

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