

Getting the Public on Side

How to Make Reforms Acceptable by Design



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Foreword

Public acceptability is an issue of core importance for policymakers and for the international organisations, such as the OECD, that are tasked with advising them. Ambitious policies are needed to enhance well-being, overcome fiscal challenges and successfully navigate the profound changes brought about by population ageing, climate change, rising inequalities, and the digital transition. These policies cannot be implemented on the scale required or sustained over time without a better understanding of how to build sufficient public support. At the same time, efforts to measure and analyse the subjective factors (such as perceptions and attitudes) and social factors (such as shared norms and social preferences) that shape people's views and responses to policy in different areas have greatly increased, providing a growing body of evidence on the “demand-side” of policy. The OECD has notably introduced new data collection tools of this kind, including the *Risks that Matter* cross-national survey, the *Drivers of Trust in Public Institutions* survey and the pilot survey on *International Attitudes Towards Climate Policies*.

Getting the Public on Side: How to Make Reforms Acceptable by Design takes stock of this emerging field and seeks to draw actionable lessons for improving the design, communication and implementation of reforms. The report contributes to two streams of OECD work: on the causes and consequences of inequality and on the political economy of reform. In particular, it builds on and extends the analysis conducted in two landmark OECD reports: *Does Inequality Matter? How People Perceive Economic Disparities and Social Mobility* and *Making Reform Happen: Lessons from OECD Countries*.

- *Does Inequality Matter?* provided an in-depth study of the role played by subjective factors in an area where research is most advanced and the evidence best established, focusing on perceptions of inequality and their impact on people's willingness to support redistributive and social welfare policies. In doing so, it highlighted the valuable additional insights that can be drawn by complementing conventional statistical measures of inequality with available “subjective” measures that reflect the way in which individuals perceive inequalities and social mobility. The current report addresses some of the outstanding methodological issues identified in *Does Inequality Matter?* and broadens the scope of analysis to other important forms of inequality, in line with the programme of work of the *OECD Observatory on Social Mobility and Equal Opportunity*.
- *Making Reform Happen* provided a series of general and sector-specific lessons on the successful conduct of reform, based on combined quantitative and qualitative analysis of actual reform episodes in member-countries over a period of several decades. In doing so, it identified public acceptability as a key condition for the successful implementation of reforms. The current report seeks to update these lessons in light of the new insights that experimental methods and behavioural approaches allow on the “demand-side” of reform.

To help support its work in these areas, the OECD set up an interdisciplinary *Expert Group on New Measures of the Public Acceptability of Reforms*. This report is based on the input from this Expert Group.

The report was prepared and drafted by Neil Martin from the OECD Centre on Well-Being, Inclusion, Sustainability and Equal Opportunity (WISE), under the supervision of Fabrice Murtin (Head of the Research, Modelling and Advanced Analytics Unit, WISE). Max Salomon Ermel (WISE at the time of

writing) provided excellent research assistance and contributed to Chapter 1. Lætitia Gauvin, Nicolò Gozzi, Simone Parazzoli, Marco Quaggiotto and Michele Tizzani (Institute for Scientific Interchange, ISI) provided the analysis for the case study of the 2023 French pension reform in Chapter 2.

The author warmly thanks Romina Boarini (Director, WISE) and all of the members of the *OECD Expert Group on New Measures of the Public Acceptability of Reforms* (see next page) for their contribution and guidance, as well as the country delegates to the *OECD Working Party on Social Policy* for their review and comments on an earlier draft of the report. Thanks are also due to Anne-Lise Faron for preparing the manuscript for publication, to Martine Zaïda and Taylor Kelly for providing support throughout on communication coordination and to Karin Klappacher, Gabrielle McFarlane-Smith and Marie-Anne Witcombe for helping support the activities of the Expert Group.

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Editorial

The structural reform challenges we face cannot be addressed without effectively engaging citizens

Governments and citizens recognise that ambitious structural reforms are required to address key challenges such as boosting productivity, responding to population ageing and optimising the digital and green transformations. Yet, even when there is broad public support for these policy goals, approval for specific policy measures to advance them, or mitigate associated disruptions, can be challenging to secure.

Structural reforms that require large-scale changes in regulation, institutions and public spending can involve significant uncertainty regarding their overall cost and who will benefit or lose. Their implementation, and public support for them, has been shaped by recent shocks, including the COVID-19 pandemic, inflationary pressures following Russia's war of aggression in Ukraine and ongoing geopolitical tensions and conflicts. Governments must also weigh the threats of misinformation and disinformation when planning for reform. Finally, evidence suggests that public views have grown more dispersed – and in some cases polarised – on a number of key policy issues, including on climate change. As a result, policymakers may find it more difficult to identify and build coalitions in support of reform.

To ensure their reform efforts are fully effective, governments will need to respond to citizens' growing demands for participation and greater involvement in decisions that will shape their livelihoods and future. They must also explain how reforms are designed to be both effective and fair. Reforms which are not built on strong public support can be less impactful and efficient and remain vulnerable to reversal once they have been implemented.

This report highlights the efforts that governments across the OECD are making to design reforms that integrate citizens' views more systematically and the tools that can help them do so. This includes using data to better understand public perceptions, attitudes and preferences, and making better use of distributional impact assessments. Complementing the 2022 OECD Guidelines for Citizen Participation, the Public Acceptability Tool outlined in this report offers policymakers a new instrument that can consolidate their engagement efforts and develop reform strategies for which public acceptability is fully integrated.



Mathias Cormann,

OECD Secretary-General

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Executive Summary

Public acceptability is an essential condition for the successful implementation of needed reforms.

Policymakers cannot build a strong case for reform on technical grounds alone. Reforms must also reflect citizens' views on issues and responses to policy measures, if they are to receive the public support needed to sustain them over time. Recent changes affecting the political economy of reform have further reinforced the importance of public acceptability. Citizens increasingly demand the right to participate in the policymaking process and the advent of social media has dramatically changed the scope and nature of public debate. Moreover, evidence suggests that individuals' perceptions and attitudes play an increasing role in explaining policy preferences. For example, the gap between those who believe inequality is high and those who believe it is low has risen in many OECD countries over the past decades. However, around 90% of the dispersion in views reflects differences *within* groups – i.e. between people who share the same socio-economic characteristics. In this context, policymakers cannot simply target well-defined groups when seeking to build effective coalitions for reform, they need to understand what views people hold and how these views are shaped by perceptions and attitudes.

Better use of available perceptual and behavioural data can help ensure that public acceptability becomes an integral part of the reform process. Recent methodological advances have shed valuable new light on the “demand-side” of reform. Drawing on survey-based and experimental methods, governments and international organisations have strengthened their capacity to measure and analyse key perceptions, attitudes and preferences in areas including tax and redistributive policies, environmental policies and social policies. These subjective data have the potential to complement traditional statistical indicators and existing policy tools, such as distributional impact assessments, in a way that can improve reforms. Recognising the relevance of these data, the OECD established an interdisciplinary *Expert Group on New Measures of the Public Acceptability of Reforms*. Its objective consisted in taking stock of the growing body of evidence and exploring how its insights can be harnessed to provide more effective guidance on the public acceptability and political feasibility of necessary reforms.

This report explores two questions based on the Expert Group's findings and relevant OECD work:

1. *How effective are our analytical frameworks for drawing policy-relevant insights on public acceptability from the available data and indicators?* This question is treated in a specific but particularly significant case, that of inequality-reducing policies (Chapter 1).
2. *What policy tools and frameworks can help better integrate considerations of public acceptability into the reform process?* This question is treated more broadly across policy areas (Chapter 2).

First, the Expert Group argued that a more realistic analytical framework can help explain people's policy preferences relating to inequality and design reforms that better reflect them. There are strong methodological and practical reasons why policy can benefit from an improved analytical framework:

- *Extension of the scope of analysis:* Standard economic models have worked relatively well for explaining the narrower and more tractable case of income inequality and preferences for redistributive policies. However, they are less well suited for analysing other important forms of inequality, such as inequality of opportunity, inequality between groups and discrimination.
- *Introduction of key elements into the analysis:* Greater psychological realism can help (i) better describe the process through which policy preferences are formed, what are the key subjective factors and how they interact; (ii) capture the important role played by contextual and country-specific elements in shaping people's views about inequality; and (iii) interpret persistent cross-country differences in support for inequality-reducing policies.

The report proposes a new framework for analysing the public acceptability of inequality-reducing policies (see Figure 1.9 for a visual representation). This framework identifies three main types of subjective factors that determine people's views about inequality and support for policies: (i) their *beliefs about inequality*; (ii) their *attitudes towards policies and government*; and (iii) their *attitudes towards others and society*. In doing so, it notably highlights the importance of taking account of the different principles people use to evaluate the fairness of policies and of the perceived impact of policies on key groups, which does not always align with actual impacts. Furthermore, the report conducts a preliminary review of possible indicators to “populate” the framework and establishes priority areas for measurement. Its recommendations include the proposal for an *OECD Perceptions Database* to help collect and harmonise relevant available data, with the aim of complementing existing OECD datasets by giving due weight to key subjective factors that help determine the public's response to proposed reforms.

Second, the report outlines a new instrument to support policymakers – the Public Acceptability Tool (PAT). The Expert Group called for the development of a “policy compass” that can help assess the extent to which a proposed reform is aligned with public views and guide choices on how to design, communicate and implement it in a way that is more likely to receive broad public support.

The PAT is composed of a general framework that articulates four main dimensions that matter for public acceptability across reform areas (see Figure 2.9 for a visual representation).

- **Economic Dimension and Fairness Dimension:** Economic and distributional impacts are key dimensions through which people assess the outcomes of reform. However, the way in which the public perceives these impacts and evaluates their effect on the status quo may differ significantly from that of policymakers. By highlighting possible gaps, the PAT can provide a clearer picture *ex-ante* of how likely a proposed reform is to be accepted based on its expected outcomes.
- **Behavioural Dimensions of Social Change:** Reforms involve broader processes of social change: they require individuals to adjust their behaviour in order to achieve a desired aggregate outcome. By taking due account of behavioural responses, the PAT can provide clearer and more realistic recommendations on how individuals should be accompanied through the process of social change implied by reform.
- **Process Dimension:** Procedural elements also play a distinct role in determining the public acceptability of reforms. Through this dimension, the PAT aims to capture the sense of legitimacy that a given reform can draw, or not, from the institutional and political processes used to design, implement and justify it.

The relative importance of these dimensions varies depending on the specific policy area, the national context and the characteristics of the reform itself, but all are relevant for understanding public acceptability across policy areas. The framework is designed to help policymakers keep track of the main determinants of public acceptability, map the possible interactions between them, and identify key data and tools.

The PAT also includes a set of complementary tools which can help adapt and tailor the general framework to specific reform areas and contexts to ensure that it is relevant and operational:

- **A “reformer’s checklist”** to ensure considerations of public acceptability are integrated systematically into the reform process and effective use is made of existing data;
- **Sectoral roadmaps** for reform to specify the relative importance of different dimensions and possible interactions between them in given policy areas and contexts;
- **Data scanning** to identify “reform-breaking data” (i.e. key subjective indicators and targets) that can be used to measure how effective the case for reform has been in building public support; and
- **A social listening tool** to help assess how the public is responding to the main aspects of the government's case for reform. An example is provided in Chapter 2 through a case study of the 2023 French pension reform.

1. Defining a conceptual framework for analysing public acceptability: What factors matter for inequality-reducing policies and how can they be measured?

This chapter explores the role that perceptions, attitudes and other subjective factors play in shaping the demand for and public acceptability of policies designed to reduce inequalities. Taking stock of current OECD research and data collection efforts, it highlights the need for a broader and more realistic approach to better account for the range of factors involved, the interactions between them as well as cross-national differences and the influence of context. Based on the guidance from the interdisciplinary OECD Expert Group on New Measures of the Public Acceptability of Reforms, a conceptual framework is proposed for analysing the formation of preferences for inequality-reducing policies. This framework is designed to help extend OECD research into areas including equality of opportunities, discrimination and horizontal inequalities and could be supported through the setting up of an OECD Perceptions Database.

1.1. What does the OECD's work on inequality tell us about public acceptability?

The 2021 report *Does Inequality Matter?* has made an important contribution to the OECD's study of inequality. The OECD has a long and well-established tradition of work on the trends, causes and consequences of inequality.¹ The report *Does Inequality Matter? How People Perceive Economic Disparities and Social Mobility* extended the analysis into an important new area by looking at the "demand-side" of the issue (OECD, 2021^[1]). In recent decades, the wider use of survey-based and experimental methods has allowed for deeper insight into the key perceptions, attitudes and policy preferences relating to inequality. *Does Inequality Matter?* reviewed the growing body of evidence provided by these perceptual and behavioural data. From there, it highlighted the relevant insights that can be drawn regarding how people perceive inequality and respond to policies designed to reduce it, focusing mainly on income inequality and redistributive policies.

In doing so, it has also underlined the relevance of the OECD's work on inequality for the broader question of public acceptability. By shedding light on the "demand-side" of inequality, the report has also helped advance the OECD's analysis of public acceptability. It has done so in two ways: (i) by tracing the impact that the observed trends and evidence on inequality have had on public perceptions and debates; and (ii) by providing an empirical basis for assessing how well the policies designed to tackle inequalities are aligned with the public's views on the issue and how likely they are to receive sufficient public support. The fact that demand for redistribution is relatively well studied and understood makes it a good starting-point for a broader reflection on the factors that drive public acceptability and the extent to which they can be measured. The OECD has contributed to collect perceptual and behavioural data on inequality through tools such as the [Risks that Matter](#) cross-national survey, [Compare Your Income](#) web-tool and [Trustlab](#).²

***Does Inequality Matter?* confirmed many of the key findings from the literature regarding the importance of perceptions and their implications for policy.** Most notably, it showed that:

- *Perceptions capture real changes and are not pure artifacts:* Perceptions and the level of concern about inequality tend to reflect the picture provided by conventional estimates. The link between actual and perceived inequality can be seen in cross-country data: where conventional estimates indicate higher income disparities and intergenerational persistence, on average people also perceive greater income inequality and lower social mobility. This link can also be seen over time, with people's concerns about income disparities tending to move in line with conventional estimates. As a result, where the latter have risen the most, the former have also tended to increase the most. Furthermore, differences in the level of concern about inequality are not strongly related to other macro-economic conditions: higher employment rates and median incomes reduce concern, but the effect is small and insignificant (OECD, 2021, pp. 40-43^[1]).
- *Perceptions matter and they contribute to shape policy preferences:* The level of concern people express about inequality is an important driver of demand for redistribution. Across the OECD in 2017, 80% of those who found that income disparities were too large also agreed that it was the responsibility of government to reduce them. Furthermore, perceived inequality may be more relevant for understanding policy preferences than actual levels of inequality. In this respect, higher levels of income disparity only tend to translate into greater demand for redistribution insofar as they are also accompanied by increased concern about inequality (OECD, 2021, p. 93^[1]).

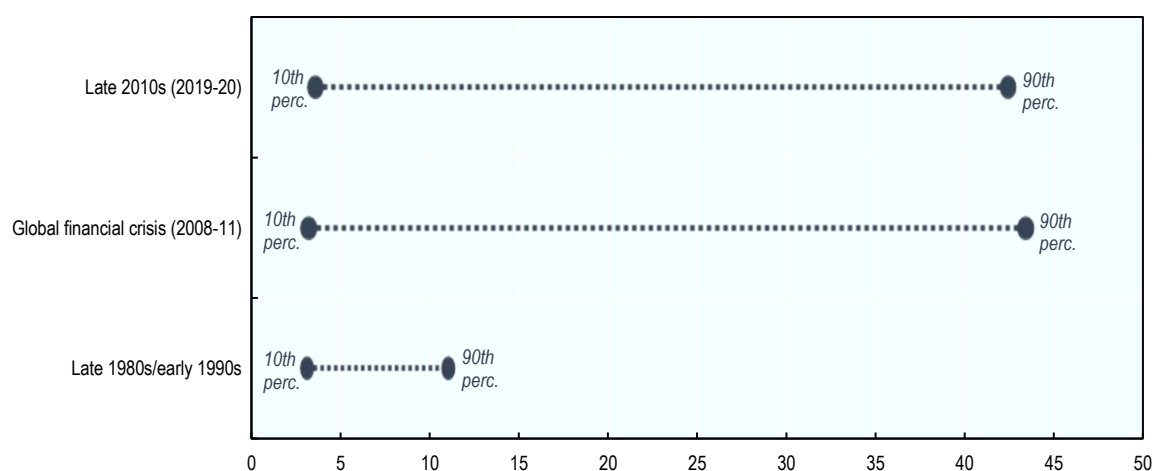
***Does Inequality Matter?* also drew attention to two problems that need to be taken into account when designing inequality-reducing policies. First, policy preferences are not easily explained by traditional socio-economic characteristics.** In most OECD countries, perceptions of inequality have tended to become more dispersed in recent decades, with a growing gap between those who believe that income inequality is too high and those who believe it is not (OECD, 2021, pp. 129-149^[1]). As shown in Figure 1.1, disagreement over the extent of earning disparities is significantly larger than it was 30 years ago. Furthermore, very little of the growing dispersion in perceptions can be explained by traditional socio-

economic characteristics. According to OECD calculations, no more than 10% of the total dispersion in perceptions of income inequality and social mobility relates to differences *between* socio-economic groups in terms of income, education, employment status, gender, age and household type. The remaining 90% reflects differences in perceptions of inequality *within* socio-economic groups – i.e. increased disagreement between people with similar socio-economic characteristics. A similar conclusion can be observed in other important areas, as highlighted for example by OECD evidence on attitudes towards climate policies.³ At an analytical level, this calls for the exploration of a wider range of potentially relevant socio-economic characteristics, notably the effects of spatial location on people's perceptions and policy preferences. It also calls for greater focus on “demand-side” factors and the role they play in explaining differences in individual views and preferences.

This problem presents challenges for policymakers and for the international organisations tasked with advising them. The fact that policy preferences cannot easily be explained by traditional socio-economic characteristics has significant implications for the political economy of reform. Identifying and building coalitions in support of policies becomes more challenging if policymakers are not able to target coherent and well-defined socio-economic groups.⁴ Similarly, policy advice must take account of the key perceptions and attitudes that constitute the “demand-side” of reform and provide a clearer understanding of what views people hold and why in order to be effective in this context. In turn, appropriate data and analytical tools are needed to support policy advice.

Figure 1.1. People disagree more than they did 30 years ago about earning disparities

10th and 90th percentiles of the perceived top-bottom earnings ratio, averaged over 8 countries



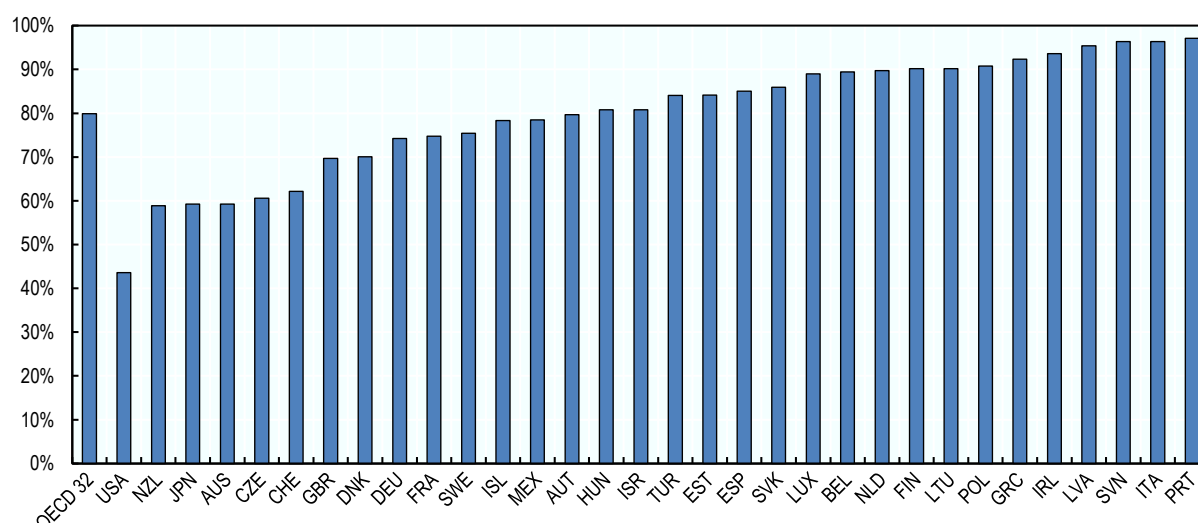
Note: The lines represent the difference between the 10th and 90th percentile of respondents ranked by their view on the top-bottom earnings ratio. The values are the average of the values for Australia, Germany, Italy, New Zealand, Norway, Slovenia, Switzerland and the United Kingdom. Austria, Hungary, Poland, Sweden and the United States were not part of the last available ISSP wave and have not been included in this analysis. Including these countries does not change the overall pattern: the perception differential is much larger in the late 2000s than in the late 1980s.

Source: OECD (2021^[1]), *Does Inequality Matter? : How People Perceive Economic Disparities and Social Mobility*, OECD Publishing, Paris, <https://doi.org/10.1787/3023ed40-en>; OECD calculations from ISSP 1987, 1992, 2009, 2019; Australian Survey of Social Attitudes 2019; Norwegian part of ISSP 2019; British Social Attitudes 2019 (Section 4.2).

The second problem consists in explaining persistent cross-country variation in the extent to which concern about inequality translates into actual support for inequality-reducing policies. The fact that concern about inequality does not uniformly and unambiguously give rise to increased demand for redistribution is a well-identified “paradox” in the literature.⁵ In some cases, a wide gap exists between levels of concern about inequality and support for government intervention. For example, in one-fifth of OECD countries only 60% or less of those who think that income disparities are too large believe that it is the responsibility of government to reduce them (see Figure 1.2). Here again, these observed differences between countries in terms of perceptions, attitudes and policy preferences need to be understood in order to provide policy advice that is effective, adapted to specific national contexts and likely to receive sufficient public support.

Figure 1.2. Concerns about inequality do not necessarily translate into support for redistribution

Fraction of people who believe it is the responsibility of the government to reduce income differences, among those who think that such disparities are too large, 2017



Note: Respondents are asked their opinion about the statements “Differences in income in [your country] are too large” and “It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes”. In Eurobarometer, the statements provided are slightly different: “Nowadays in [your country] differences in people’s incomes are too great” and “The government in [your country] should take measures to reduce differences in income levels”, but the response scale is identical. For consistency, this figure uses data from ISSP where available.

Source: OECD (2021^[1]), *Does Inequality Matter? : How People Perceive Economic Disparities and Social Mobility*, OECD Publishing, Paris, <https://doi.org/10.1787/3023ed40-en>; OECD calculations from ISSP 2017, apart from Belgium, Estonia, Greece, Ireland, Italy, Luxembourg, Latvia, Netherlands, Poland, Portugal, Slovenia whose data are from Eurobarometer 471/2017.

Finally, *Does Inequality Matter?* outlined a programme for further research. Overall, *Does Inequality Matter?* demonstrated the valuable additional insights that can be drawn by combining and comparing the “objective” measures of actual inequality provided by conventional statistical indicators with “subjective” measures reflecting how inequality is perceived, experienced and interpreted. It also pointed to the need for further research to fully exploit the insights from perceptual and behavioural data and support the design of more effective policies for reducing inequality. Following OECD (2021^[1]), several priorities can be identified to guide the OECD’s research in this area:

- In order to turn the available perceptual and behavioural data into actionable insights, the ways in which the relevant perceptions, attitudes and preferences interact need to be better understood.
- Moving beyond the narrower focus on income inequality and demand for redistribution, further questions emerge regarding (i) the types of inequality that matter to people; (ii) the broader range of actors and policies that contribute to reducing inequalities; and (iii) the role played by “horizontal” forms of inequality between groups.
- From a more practical perspective, it is also important to consider what types of data and indicators, both objective and subjective, are needed to shed light on these questions and how they can best complement existing OECD indicators on inequality.

Progress is needed on two fronts: (i) richer data on people’s perceptions and attitudes towards inequality; and (ii) better analytical frameworks to explain how their policy preferences are formed.

The OECD is contributing to advance the research agenda on both of these fronts. On the data collection side, the [OECD Observatory on Social Mobility and Equal Opportunity](#) has extended the scope of analysis beyond the starting-point provided by OECD (2021^[1]). In order to do so, it has looked beyond the latter’s focus on income inequality and demand for redistribution and has collected data on perceptions and attitudes towards other types of inequalities and on preferences for a broader range of inequality-reducing policies. These data offer a richer and more complex picture of what drives the demand for and acceptability of inequality-reducing policies. More detailed background on the work conducted under the OECD Observatory on Social Mobility and Equal Opportunity can be found in Annex 1.A. In parallel, the OECD Expert Group on New Measures of the Public Acceptability of Reforms has sought to strengthen the conceptual basis of the OECD’s work by improving its understanding of the process through which policy preferences relating to inequality are formed (see Box 1.1).

Based on the input of the Expert Group, this chapter develops a more realistic and adapted model of the process through which preferences for inequality-reducing policies are formed. This has implied updating the standard economic model used in *Does Inequality Matter?* to measure and interpret perceptions and preferences (OECD, 2021, pp. 33-35^[1]). While this model is broadly in line with the economic literature on perceptions of inequality and preference for redistribution and has demonstrated its utility in the context of *Does Inequality Matter?*, a multidisciplinary perspective is needed to address several of the remaining analytical and methodological challenges highlighted in the previous section and move the research agenda forward.⁶ The Expert Group was set up to provide this multidisciplinary perspective. Its objective in developing a conceptual framework for analysing the formation of policy preferences is (i) to help better identify the key subjective factors that contribute to shape public acceptability in the area of inequality; and (ii) to advise on an effective strategy for measuring these factors.

The details of the proposed conceptual framework are presented in Section 1.2. Section 1.2.1 identifies the key factors to include in the framework. Section 1.2.2 discusses additional issues relating to the structure of the framework. Finally, Section 1.2.3 describes the framework.

Box 1.1. The OECD Expert Group on New Measures of the Public Acceptability of Reforms

The Expert Group on New Measures of the Public Acceptability of Reforms was set up in 2021 to help the OECD take stock of recent advances in the measurement and analysis of subjective factors, including perceptions, attitudes, policy preferences and social norms. The aim in doing so was (i) to consolidate the OECD's efforts to collect relevant perceptual and behavioural data; (ii) to harness the insights from this growing body of evidence on the role that subjective factors play as determinants of public acceptability; and (iii) to improve the OECD's policy advice and recommendations through a better understanding of the key elements that constitute the "demand side" of reform.

Many of the recent advances in the measurement and analysis of subjective factors have been driven by the use of experimental methods and behavioural approaches that are not always well-represented in standard policy toolboxes. The research agenda on this topic has also taken place across (and often at the intersection of) many different disciplines. Reflecting this, the Expert Group was designed to be interdisciplinary and brought together leading academic experts from relevant fields including economics, game theory, behavioural science, political science and sociology. Given its focus on policy applications, it also included experts from national governments and statistical offices, as well as experts from other international organisations (European Commission, International Monetary Fund and World Bank) and from foundations working on this topic (Ford Foundation). The members of the Expert Group are listed in the Foreword to this document.

The mandate of the Expert Group consisted in helping the OECD develop a theoretical and empirical framework to support policymakers' efforts to design reforms that are acceptable to the public, as called for at the 2019 OECD Conference on *The Changing Political Economy of Reform*.

In order to do so, the activities of the Expert Group were organised into two complementary stages:

- The Expert Group started by looking at the question of ***the demand for and acceptability of inequality-reducing policies***. The reasons for choosing this particular question and area as a starting point are two-fold. First, the role played by subjective factors is well-studied and understood in the case of inequality and the OECD has collected extensive evidence on this topic that the Expert Group can contribute to leverage and extend (see section above). Second, inequality is both a highly salient topic and one that is likely to yield broader lessons on public acceptability through the specific focus it puts on fairness considerations and on the distributional impact of policies. The perceived fairness and effectiveness of policies are two essential determinants of public acceptability and key conditions for the successful implementation of reforms. In the case of inequality, both are intrinsically connected. This stage of the Expert Group's activities is covered in Chapter 1 of this report.
- In a second stage, the Expert Group considered the lessons that can be drawn from the study of inequality-reducing policies for ***the broader question of the public acceptability of reforms across policy areas***. In particular, it sought to explore (i) to what extent the key lessons from the first stage can be generalised and applied to assess public acceptability in other policy areas (*How do people perceive distributional impacts?; What type of fairness principles do they use when assessing policies?...*); and (ii) how the insights from perceptual and behavioural data can be organised and used more effectively to inform the design and communication of reforms. This stage of the Expert Group's activities is covered in Chapter 2.

1.2. How are policy preferences formed? A conceptual framework for understanding the public acceptability of inequality-reducing policies

1.2.1. The content of the framework: What are the key factors to consider in the analysis?

Policy preferences are shaped by a range of other perceptions and attitudes and cannot be properly understood in isolation. These perceptions and attitudes may relate to the policies themselves, but also to the issues they are meant to address or to the broader context in which they take place. Based on the input from the Expert Group, policy preferences relating to inequality are analysed here as the complex outcome of interactions between a set of subjective determinants. The key factors identified by the Expert Group include (i) *beliefs about inequality*; (ii) *attitudes towards policies and government*; (iii) *attitudes towards others and society in general*; and (iv) *the type of information available to individuals and how it is received*.⁷ This section provides a short overview of these key factors, why they matter for the analysis of policy preferences and what challenges remain to be addressed.

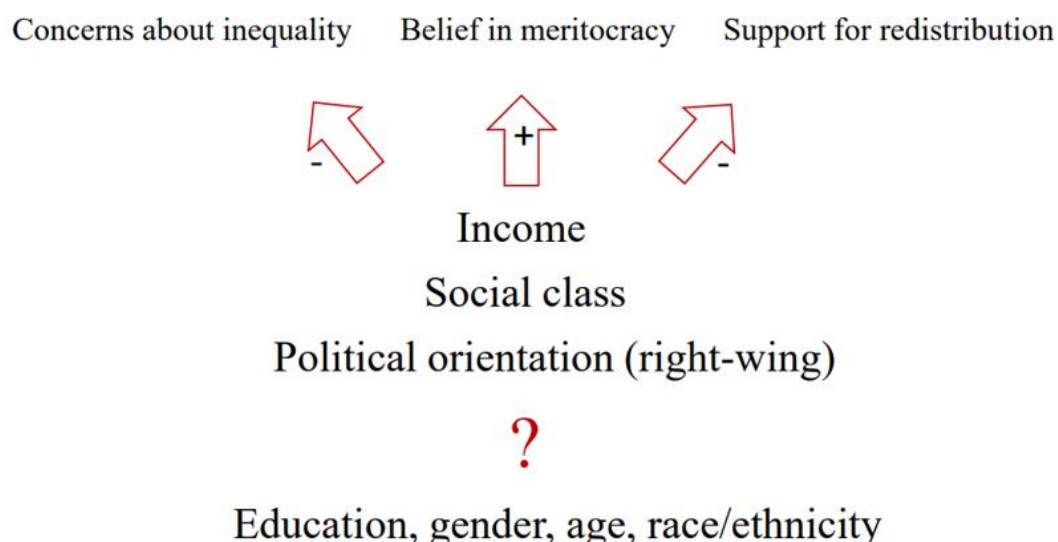
Beliefs about inequality

How people view inequality is essential for understanding whether or not they support policies designed to reduce it. These views themselves are shaped by different types of beliefs. Based on the literature, three main types of belief about inequality can be distinguished (Mijs, 2018^[2])⁸:

- i. ***Perceptions of inequality***, which consist in descriptive beliefs about the levels and trends in inequalities (both in terms of outcomes and opportunities, at the bottom and at the top of the distribution...), as well as individuals' relative position within the distribution.
- ii. ***Explanations of inequality***, which consist in causal beliefs about the determinants of inequality. As highlighted by the broader literature and confirmed by OECD data (see previous section), there is an additional important distinction to be made here between two types of causal beliefs that explain inequalities by attributing them to factors either within or beyond an individual's control. On this basis, beliefs about inequality tend to be organised around (i) a "***meritocratic***" worldview in which outcomes primarily reflect the individual's own agency (talent, hard work, effort...); and (ii) a "***structuralist***" worldview in which external factors play a significant role in shaping individuals' outcomes despite their agency (luck, socio-economic background...).
- iii. ***Attitudes towards inequality***, which consist in a wide range of judgements relating to inequalities (beliefs about the acceptability and fairness of inequalities, what types of inequality matter, whether they should be reduced or not...).

Important questions remain to be addressed regarding beliefs about inequality, their determinants and the role they play in the formation of policy preferences. Further research is notably needed to better understand how these different beliefs interact with one another and with contextual variables. Perceptions, explanations and attitudes towards inequality tend to be closely related and can influence one another in multiple and sometimes contradictory ways. One well-studied example of a complex channel through which perceptions, explanations and attitudes interact can be seen in the dampening effect that meritocratic beliefs have on people's concerns about inequality and on their support for redistribution.⁹ "Unpacking" people's views about inequality is therefore not a straightforward or linear task and a degree of psychological realism is needed in order to properly account for the way in which different types of beliefs interact. Understanding how these different types of beliefs relate to individual characteristics is equally complex and can help explain the limited relevance of traditional socio-economic determinants in predicting people's views about inequality (OECD, 2021^[1]) and about climate policies (Dechezleprêtre et al., 2022^[3]). Figure 1.3 provides an overview of what is known about the individual determinants of meritocratic beliefs.

Figure 1.3. Belief in meritocracy and redistribution: What do we know about individual-level determinants?



Note: “+/-” indicate an established correlation, positive and negative respectively, between individual characteristics and key beliefs relating to inequality. “?” indicates that individual characteristics are not predictors of key beliefs relating to inequality or that the results from the literature are ambiguous.

Source: Jonathan Mijs – Presentation to the OECD Expert Group on New Measures of the Public Acceptability of Reforms.

Further research is also needed to better understand under what conditions people form and change their beliefs about inequality. Evidence from the experimental literature confirms that people do adjust their perceptions and concerns about inequality when provided with new information, but these effects do not always translate through to their policy preferences, notably for redistribution.¹⁰ Furthermore, people do not act like ideal “Bayesian learners” actively and continuously updating their beliefs in line with the available information. Evidence from developmental psychology suggests that certain core beliefs about inequality are formed early and remain relatively stable throughout life (Almås et al., 2010^[4]; Almås et al., 2024^[5]; Dickinson, Leman and Easterbrook, 2023^[6]). Similarly, evidence from the political science and sociological literatures suggests that attitudinal change is more likely to happen at a generational level than within cohorts (Janmaat, 2013^[7]). As a result, the analytical framework should also seek to take account of the processes through which people update their beliefs about inequality and the conditions under which they do so. Furthermore, the relative importance of belief formation and belief adjustment has significant implications for the value of information, for communication strategies and for the dynamics of attitudinal change.

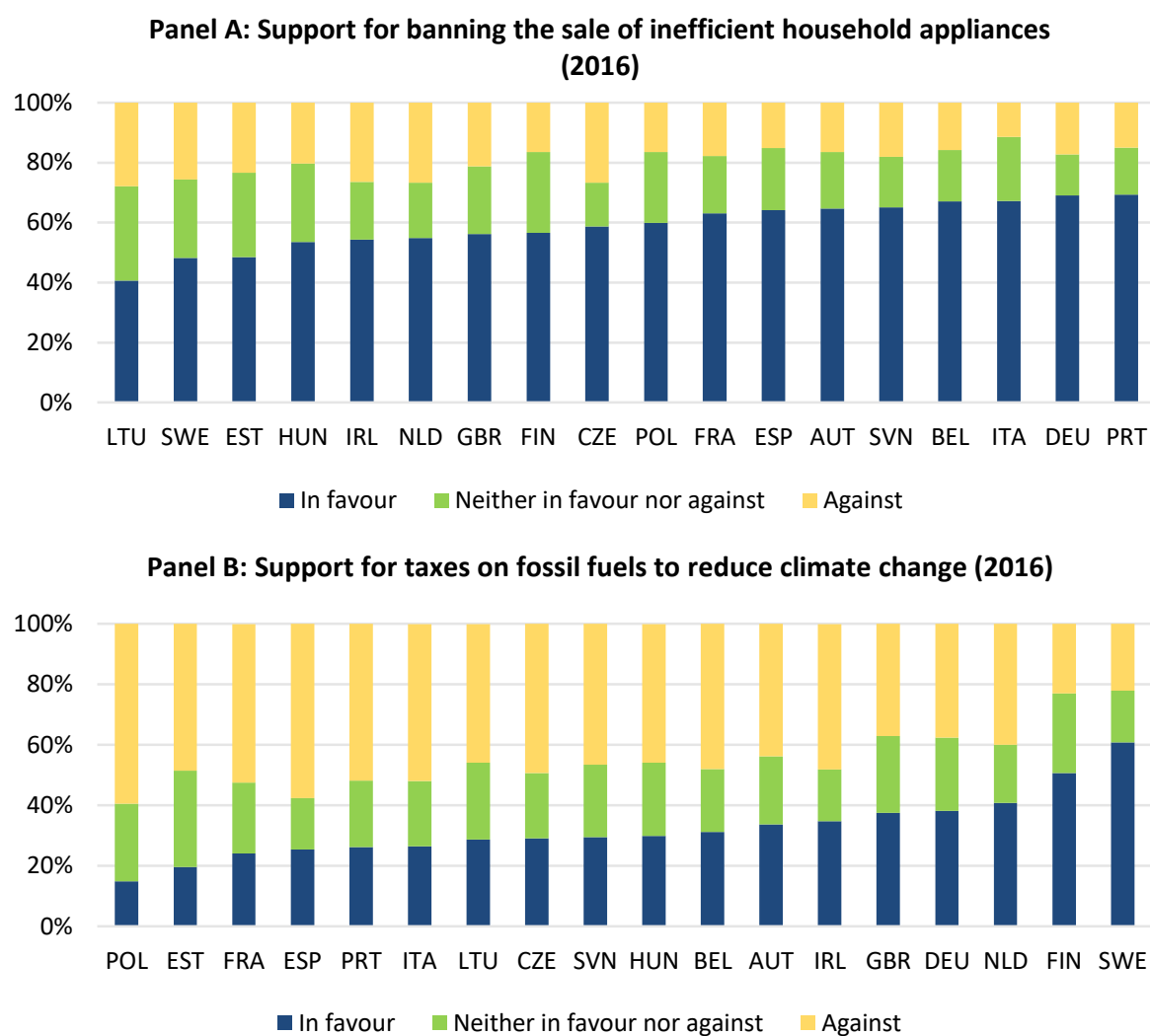
Finally, the social context plays an important role in shaping the formation of beliefs about inequality and in enabling or hindering the adjustment of beliefs. An individual’s social context influences how they learn about inequality (Mijs, 2018^[2]; Mijs, 2023^[8]). It can also contribute to reinforce particular beliefs about inequality. For example, high levels of socio-economic segregation may facilitate the formation of meritocratic beliefs which may in turn deepen inequality and segregation (Mijs and Roe, 2021^[9]). The analytical framework should therefore seek to take account of the role played by social context as a “filter” through which beliefs about inequality are formed and adjust. Understanding its role will require in turn a greater use of geo-spatial data and further efforts to analyse the impact of household location on perceptions and attitudes. Doing so can help better identify the conditions under which people update their beliefs, what type of information they are likely to integrate into their views and in what form.

Attitudes towards policies and government

The perceived effectiveness and fairness of policies are important determinants of public support across different areas. Empirical evidence confirms that this is notably the case for inequality-reducing policies (Durante, Putterman and van der Weele, 2014^[10]; OECD, 2021^[11]) and for climate policies (Dechezleprêtre et al., 2022^[3]; Colantone et al., 2024^[11]; Voeten, 2024^[12]). More broadly, trust in government and institutions is an outcome of the perceived effectiveness and fairness of policies and public services (Murtin et al., 2018^[13]). It is also a factor that contributes to perceived effectiveness and fairness, as trust in government and institutions tends to increase compliance with a range of public policies (OECD, 2017^[14]; 2024^[15]), with some evidence suggesting this was the case for compliance with public health measures during the COVID-19 pandemic (Wright, Steptoe and Fancourt, 2021^[16]). As a result, all three of these factors (perceived effectiveness, perceived fairness, trust in government) should feature in the analysis of policy preferences on inequality.

Important gaps may nonetheless exist between people's support for policy goals and for the means through which these goals are to be implemented. Figure 1.4 provides an illustration of this by highlighting the gap in support between climate policies that are publicly acceptable (such as banning the sale of inefficient household appliances – Panel A) and those that economic theory suggests are most effective in reducing emissions (such as a carbon tax – Panel B). The provision of information on the effectiveness and distributional impact of policies can in some cases help shift attitudes and strengthen public support, as shown by (Dechezleprêtre et al., 2022^[3]) for a range of climate policies including a carbon tax with cash transfers. However, improving people's understanding of how policies work and who they affect through the provision of information will not always lead public views to align with the most effective or efficient policies.¹¹ Policymakers will therefore continue to face real trade-offs between efficiency and public acceptability when selecting instruments in a number of areas (Kallbekken, 2013^[17]; Cohn, 2016^[18]).¹² This is more likely to be the case in situations where (i) there is a wide gap between the measures that are efficient from a cost/benefit point of view and those that are acceptable to the public; and (ii) people's attitudes towards policies or issues are based on strongly-held beliefs that may not be swayed by new information.

Figure 1.4. Across the EU, there are wide gaps in public support between the most acceptable policies and the most effective policies in the context of the Green Transition



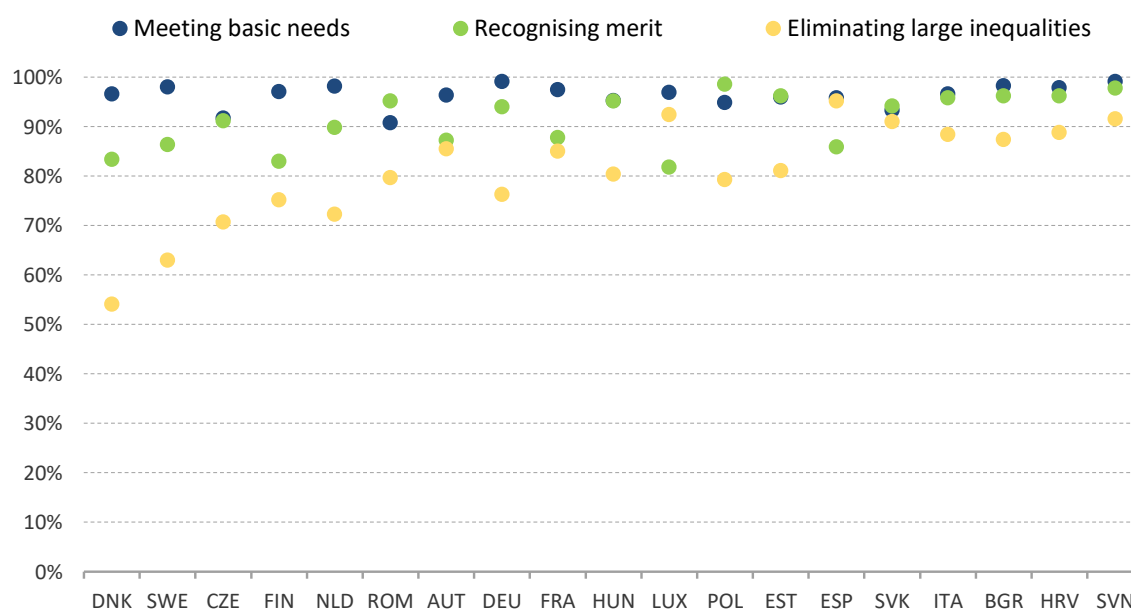
Source: European Commission: Directorate-General for Employment, Social Affairs and Inclusion (2019^[19]), *Employment and social developments in Europe 2019 – Sustainable growth for all – Choices for the future of Social Europe*, Publications Office, 2019, <https://data.europa.eu/doi/10.2767/305832>, based on *European Social Survey 2016*.

Evidence confirms that the principles used to evaluate fairness tend to be broadly shared, with some variation across countries (see Figure 1.5). However, people may disagree when applying them to specific cases and different principles may be used to evaluate different types of policies.¹³

As a result, further research is needed to understand (i) which fairness principles are relevant for evaluating policies and their outcomes and in what contexts; and at a more granular level (ii) how different groups converge on a shared understanding of what counts as fair, how they apply these principles when assessing the status quo and what policy responses they consider appropriate when the status quo deviates significantly from what is perceived to be “fair”. The available evidence suggests that specific fairness beliefs are mobilised when evaluating different types of policies (Cavaillé, 2023^[20]). In the case of inequality, this implies that particular attention be given to two types of fairness beliefs:

- **Meritocratic vs. Structuralist beliefs**, which are relevant for understanding attitudes towards redistributive policies (for example, willingness to support progressive taxation) as these causal beliefs about inequality play a central role in shaping people’s assessment of the fairness of market outcomes and the degree to which effort is rewarded;¹⁴ and
- **Reciprocity beliefs**, which are relevant for understanding attitudes towards mutual insurance (for example, willingness to support the expansion of social welfare). Here, evaluations of both the fairness and effectiveness of policies are tied to beliefs about the motivational aspects of social benefits (including potential dis-incentivising effects) as well as the personal characteristics and behaviour of their recipients (risk of “moral hazard” and absence or prevalence of free-riding).¹⁵

Figure 1.5. Across the EU, there is broad support for fairness principles combining merit-based elements and basic access



Note: Respondents are asked their opinion on the importance of the following statements as reflections of “what a society should provide”: “Guaranteeing that basic needs are met for all in terms of food, housing, clothing, education, health”; “Recognising people on their merits”; and “Eliminating large inequalities in income between citizens”. % shown in the chart combines those considering these principles to be “very important” or “quite important” as opposed to “not important” or “not at all important”.

Source: European Commission: Directorate-General for Employment, Social Affairs and Inclusion (2020^[21]), *Employment and social developments in Europe – Leaving no one behind and striving for more – Fairness and solidarity in the European social market economy*, Publications Office, <https://data.europa.eu/doi/10.2767/478772>, based on *European Values Study 2017*.

Attitudes towards others and society in general

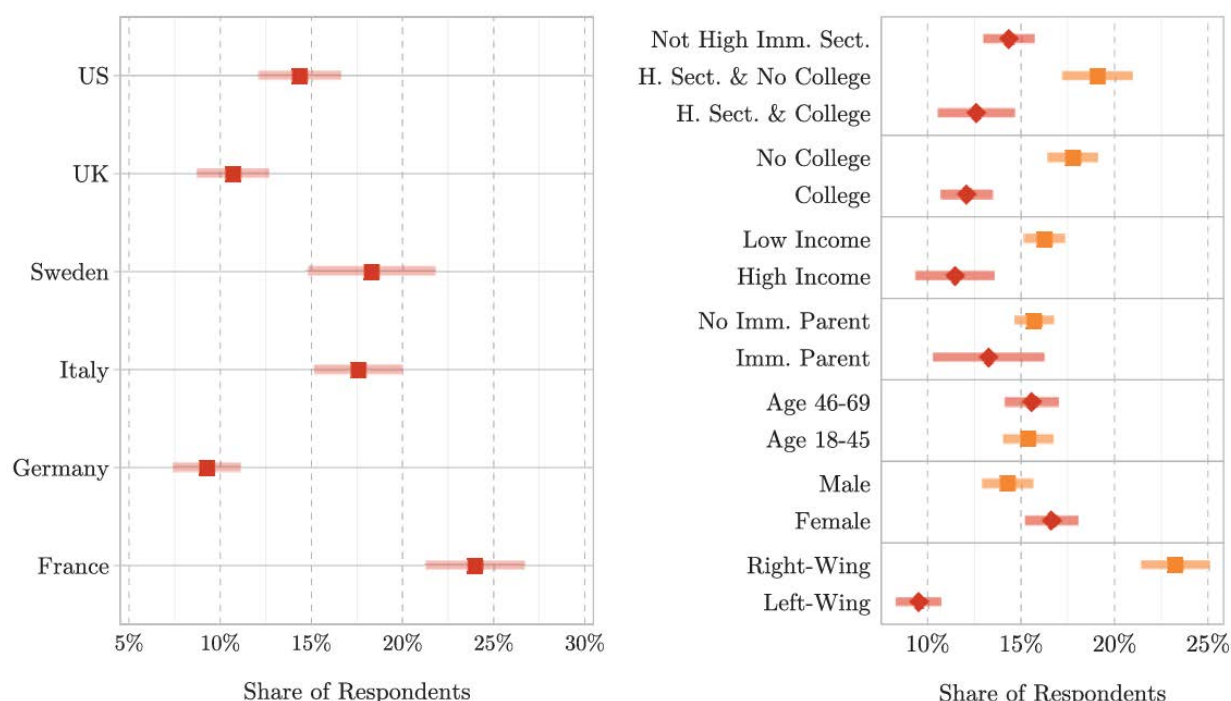
Attitudes towards policies and government are not the only element to take into account when considering the relation between inequality and support for policies designed to reduce it. This idea is well captured in classical and modern political theories of the social contract. These theories include a “vertical” dimension through which government derives legitimacy and the loyalty of citizens from its capacity to deliver the fundamental individual rights and public goods that are part of the social contract. However, theories of the social contract also include a “horizontal” dimension through which individuals commit themselves to follow shared rules that are necessary for the functioning of society and of a common government.¹⁶ This horizontal dimension has been formalised in economic and game-theoretic models of the social contract, where it has been used to explain the emergence of social order and highlight the role that mutual expectations play in sustaining shared standards and stable patterns of collective behaviour.¹⁷ In the context of welfare and redistribution, it reflects the idea that, while government constitutes one of the main levers through which society can reallocate resources in a way that is designed to promote the common good, in the end of the day redistribution represents a collectively agreed transfer of resources within society itself in addition to a moral obligation towards individuals.

Attitudes towards others are highly relevant for understanding people’s beliefs about inequality and their support for inequality-reducing policies. In the context of welfare and redistribution, support for policies partly reflects self-interest but is often also mediated by the expectations and beliefs that people have of others (Cavaillé and Trump, 2015^[22]; Dimick, Rueda and Stegmueller, 2016^[23]). In turn, these “other-regarding” expectations and beliefs tend to be “target-specific” and differentiate between groups in terms of deservingness (van Oorschot, 2000^[24]; Fong, 2001^[25]; Fong and Poutvaara, 2019^[26]). The analysis needs to be able to take account of these “target-specific” beliefs, their influence on policy preferences and the key reference groups they are applied to. Significant gaps remain to be filled here. For instance, while there is a well-developed literature on how “the poor” are perceived, what is expected of them and what constitutes pro-social behaviour on their part, more work is needed on how “the rich” are perceived and what people expect of them. Focus should also be put on better understanding the effects that social welfare institutions have on perceptions of recipients and support for policies to help explain cross-country differences in key beliefs and attitudes towards inequality (Larsen and Dejgaard, 2013^[27]; Hedegaard and Larsen, 2019^[28]).

The impact of discrimination on support for policies, notably through the racialisation of attitudes towards government interventions, is another important area where further research is needed. Alesina, Miano and Stantcheva (2023^[29]) provides an interesting illustration of a perception gap of this type (see Figure 1.6). The left panel shows for example that nearly a quarter of French respondents believe immigrants receive at least twice as much in government transfers as native citizens do. In fact, when pension benefits are included, immigrants actually receive less in transfers than native citizens do. The analysis suggests furthermore that the perception gap is largely driven by the belief that immigrants are favoured by the welfare system or take advantage of it, rather than by the more benign belief that immigrants are poorer than native citizens and receive transfers they are entitled to. Evidence from Alesina, Miano and Stantcheva (2023^[29]) also points towards widespread and often large misperceptions regarding the size, composition and socio-economic characteristics of immigrant populations.

Figure 1.6. There are large gaps in the perceived reliance of immigrants on government transfers

Share of respondents who think immigrants receive at least twice as many government transfers as non-immigrants



Note: The left panel shows the share of respondents in 6 OECD countries who think that an average immigrant (defined as “somebody legally living in the country of the respondent but born abroad”) receives at least twice as many government transfers as an average non-immigrant. The shaded areas represent the 95% confidence intervals around the average share. The right panel represents the average share across all countries for the following population groups: those who do not work in a high immigration sector; those who work in high immigration sectors and (i) have no college degree or (ii) have a college degree; the college-educated and non-college-educated; high-income and low-income respondents; those who have an immigrant parent and those who do not have an immigrant parent; respondents 18-45 vs. 46-69 years old; male vs. female; and left-wing vs. right-wing. Respondents are classified as being in high immigration sectors depending on whether their current sector of employment (or last sector of employment, if currently unemployed) has an immigrant share that is higher than the national average. Source: Alesina, Miano and Stantcheva (2023^[29]), *Immigration and Redistribution*, *The Review of Economic Studies*, <https://doi.org/10.1093/restud/rdac011>.

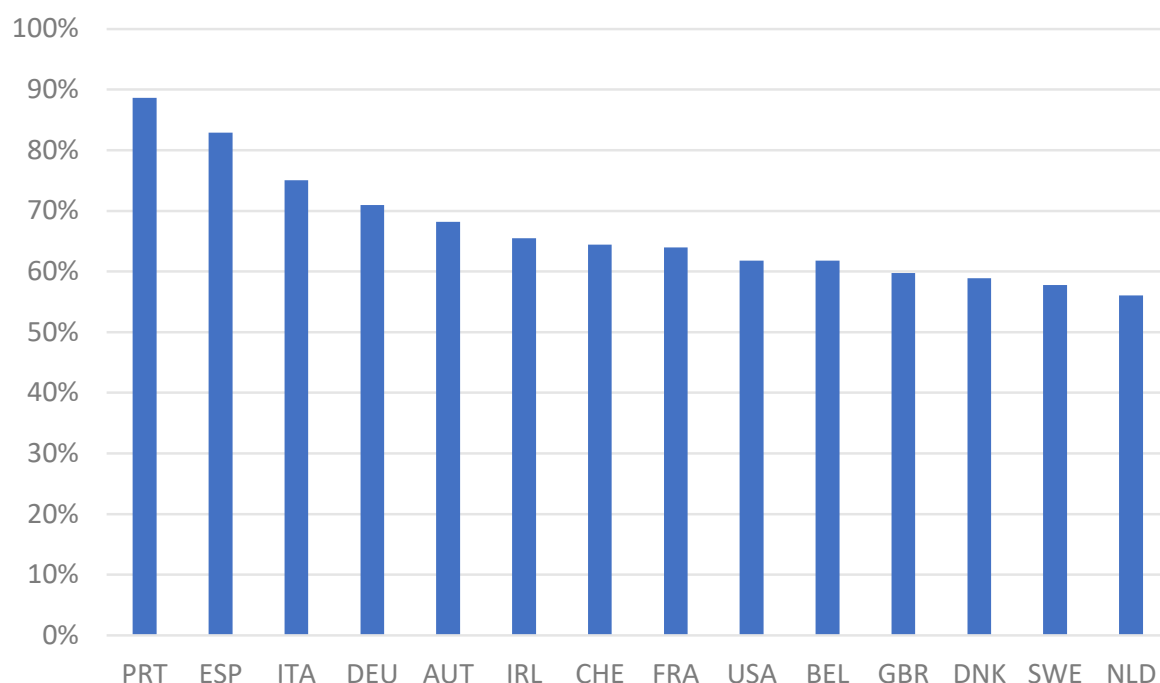
Furthermore, attitudes towards others play an important role in determining whether societies can solve social dilemmas and how. Perceptions of others tend to focus on particular salient traits that can give rise to stereotypes and stigma when they are generalised and taken as representative of a whole group (Kahneman and Tversky, 1972^[30]; Bordalo et al., 2016^[31]; Alesina, Miano and Stantcheva, 2023^[29]). The literature on collective action highlights the strong effect that the existence of stereotypes and “labels” can have on the level of coordination and extent of cooperation within societies, alongside other structural conditions such as the size and homogeneity of societies (Sugden, 1986^[32]; Ostrom, 2000^[33]; Ellingsen et al., 2012^[34]). Similarly, shared norms and conventions also help determine how specific societies solve “social dilemmas” where coordinated action is needed and influence the long-term “paths” they take as well as the institutions they develop (Young, 2001^[35]; Algan and Cahuc, 2009^[36]). Social dilemmas are useful tools for understanding and analysing the “public goods” aspects of welfare and redistribution (Rothstein, 2001^[37]). Here again, attention should be given to the role played by horizontal forms of inequality, including group identity and stereotypes, in shaping support for inequality-reducing policies, as well as to the role that institutions (including informal ones such as social norms) play as devices for solving social dilemmas.

The role of information

Information plays an important role in explaining how individuals experience and learn about inequality, as well as the beliefs they form. Information does not only influence an individual's perceptions, it also has a broader effect on their beliefs about inequality (Trump, 2018^[38]) and attitudes towards others (Cetre et al., 2020^[39]). This reflects the broader fact that both types of belief are mobilised and partly generated during the process of learning about inequality. The analytical framework should therefore seek to take account of the key characteristics of the information environment, including in terms of access to information, the salience of inequality as an issue and the type of information consumed. The *Inequality and Politics* survey, for example, sheds light on the salience of inequality across 14 OECD countries (Pontusson et al., 2020^[40]). Results suggest that, at least in the countries surveyed, inequality is a highly salient topic (see Figure 1.7). However, while over 50% of respondents in all countries and income deciles consider economic inequality to be important, the issue only features among the 3 most important topics for respondents in one of the countries surveyed (Germany). The survey also finds that the salience of inequality depends on income and social status, but often in a complex and non-linear way.

Figure 1.7. Inequality is a highly salient issue in many OECD countries

% of respondents for whom economic inequality is a very important or extremely important topic



Note: Respondents were asked to rate the importance for them of the following 7 topics: “Economic inequality”, “Crime and terrorism”, “Unemployment”, “Public debt”, “Immigration”, “Public services”, and “Environment”. Answers were on a 5-point scale going from “Not at all important” to “Extremely important”. The figure represents the proportion of respondents who answered “Very important” (4) or “Extremely important” (5).

Source: Pontusson et al. (2020^[40]), “Introducing the Inequality and Politics Survey: Preliminary Findings”, *Unequal Democracies Working Paper* No. 16, University of Geneva, <https://doi.org/10.48573/jfa4-cd92>.

Further research is also needed to better understand the mechanisms through which individuals collect and process information when forming their views on inequality. There is significant heterogeneity in how individuals “receive” information, notably in terms of search behaviour, reference groups and trusted sources.¹⁸ Here again, the social context may play a significant role in “filtering” people’s experience of inequality, the type of information they have access to and how they process it. This can contribute to increase and entrench the dispersion of views on inequality, notably in societies with high levels of segregation (Mijis, 2017^[41]; 2018^[2]).

The “supply side” also needs to be considered when analysing the informational environment. In particular, this involves looking at the ways in which media and political actors shape the reception of information about inequality through their agenda-setting power, their influence on the salience of inequality and the specific narratives they develop to frame public debates (Cavaillé, 2023, pp. 164-219^[20]). These actors may play a significant role in explaining cross-national differences in attitudes towards inequality and relevant policy preferences. Taking account of the supply of information is particularly important in light of the growing challenges raised by misinformation and disinformation spread online.¹⁹

Finally, a measure of caution is warranted as more information does not always lead to better outcomes. As highlighted by the literature in game theory and behavioural economics, this is notably due to the impact that information may have at the collective level in terms of facilitating or hindering coordination and cooperation,²⁰ as well as its impact on individual behaviour and the limits of individuals’ capacity to process more information.²¹ In this respect, policymakers and international organisations may need to consider what types of information to provide, when and with what explanatory context, particularly in situations where there is significant heterogeneity in views.

1.2.2. The structure of the framework: How should the factors be organised?

In addition to identifying the key factors for analysis, a number of structural issues need to be addressed in order to build a model of the formation of policy preferences relating to inequality. The recommendations from the Expert Group imply the need for deeper analysis of several key factors already present in (OECD, 2021^[1]) (*beliefs about inequality; attitudes towards policies and government; the role of information*) and the introduction of a new type of factor into the model (*beliefs about others and society*). Furthermore, they underline the role that other background elements, including notably the social context and group identity, play in shaping these factors. The Expert Group provided advice on how to structure the framework in a way that can integrate the different factors identified and the main elements that influence them. The present section explains the approach taken in organising the key factors.

The proposed framework is organised around 3 different blocks. These blocks cover the main specific “components” that are necessary to understand policy preferences relating to inequality and what determines them:

- A first block on **Inequality** would cover the processes through which people learn about and understand the framework’s core issue, including the beliefs they form (the *What?* question, which serves to define the issue and related policy preferences to be analysed).
- A second block on **Policy** would cover the processes through which people assess the means that governments use to address the issue and the attitudes that result from these processes (the *How?* question, which serves to define the policy measures and responses to be considered).
- A third block on **Society** would cover the processes through which people form expectations of each other in the context of welfare and redistribution (the *Who?* question), as well as the general vision of society which they rely upon to frame issues relating to inequality (the *Why?* question). This third block is needed to account for the specific “social contractual” dimension associated with inequality and the policies designed to address it. It also brings into the analysis other structural elements or trends that may be influencing people’s attitudes towards others and through them

their beliefs about inequality, their attitudes towards policies and government as well as their policy preferences. These structural elements and trends may include, for instance, changes in group dynamics or in levels of interpersonal trust and the effects of increased resentment along ethnic-racial lines.

The framework must also consider how to account for the social and psychological processes involved in the formation of policy preferences. In order to do so, a number of difficulties must be addressed. First, introducing greater complexity into the model raises the issue of how and to what extent the interactions between the different factors can be adequately described, with a significant risk of endogeneity. Secondly, thought must be given to how the framework can account for the role played by important background or contextual variables (such as group identity, social context or access to information) that contribute to shape individual perceptions, attitudes and preferences relating to inequality.

The strategy adopted in building the framework reflects these structural considerations. It follows two guiding principles:

- i. ***Greater psychological realism in the analysis of the processes through which people form their perceptions, attitudes and preferences relating to inequality:*** This involves taking perceptions of inequality as a starting point, distinguishing between different types of beliefs and accounting for the main relevant forms of behaviour (including information search, belief formation and belief change). Doing so is necessary in order to advance the research agenda and better address the challenges highlighted in Section 1.1; and
- ii. ***A “thicker” description of the informational and social environment in which people form these perceptions, attitudes and preferences:*** This is necessary in order to capture important contextual elements that shape the way in which people learn and form their views about inequality and the policies designed to reduce them. Doing so can also shed light on the conditions under which people may change their views.

1.2.3. Description and visualisation of the framework

Based on the guidance of the Expert Group, a conceptual framework was developed for analysing the formation of policy preferences relating to inequality. As described in the previous section, the framework is organised around 3 blocks. These blocks include (i) a key output variable; and (ii) the main explanatory factors that have been identified under each block.

The proposed key output variables are:

- ***Block 1: Concerns about inequality*** (measured through surveys covering the different domains of inequality that matter for people: income, wealth, opportunities, between groups...). In addition to surveys and experiments, other methods designed to elicit social preferences relating to inequality include calculating revealed preferences from actual behaviour, notably through labour supply responses to changes in the tax and benefits system using the “inverted optimal tax approach” (Bourguignon and Spadaro, 2012^[42]; Bargain et al., 2013^[43]; 2014^[44]).
- ***Block 2: Support for policies / policy preferences*** (measured by levels or ranking, as a proxy for public acceptability). The inequality-reducing policies considered can be distinguished using a policy matrix as done for example in OECD (2023^[45]) (see Table 1.1 below). The first axis of the matrix considers the targets of intervention, dividing them into three groups: low-income households, middle-income households and high-income households. The second axis classifies policies in terms of the stage of the economic process at which the interventions take place. On this basis, the relevant types of policies can be distinguished as follows:

- *Pre-production or “pre-distribution”*: Policies that influence the initial endowments individuals bring to the marketplace, covering aspects such as education, skills, financial resources, social networks and social capital.
- *Production-stage or “in-market distribution”*: Policies that directly influence firms' decisions relating to employment, investment and innovation, and thereby shape the economic landscape from within.
- *Post-production or “redistribution”*: Policies that are implemented ex-post, involving the transfer of income and wealth after they have already been generated.
- **Block 3: Societal preferences regarding inequality**. Several key factors relating to the perceptions and attitudes people have towards others, society as a whole and the social contract should be covered here. This may notably include collective attitudes towards risk sharing, people's conceptions of the social contract (measured qualitatively) and country-specific responses to social dilemmas (captured through behavioural measures or proxies).

Table 1.1. A matrix to classify inequality-reducing policies

	Pre-production	Production	Post-production (redistribution)
Low-income	Improve equal access to education	Increase (or introduce) minimum wages Support low-income areas through investments and subsidies for firms	Expand (or introduce) social benefits and/or services for low-income households
Middle-income	Re-train the unemployed and workers affected by structural change	Introduce or strengthen measures to fight discrimination Strengthen the role of trade unions/collective bargaining and other forms of employee representation	Introduce tax exemptions targeted at mortgage interest, childcare and health expenses Increase the progressivity of the tax system
High-income	Increase (or introduce) taxes on large inheritance, gifts and estates	Protect national businesses from international competition Strengthen anti-trust and competition policies to level the playing field	Increase income taxes on top earners Increase (or introduce) corporate taxes

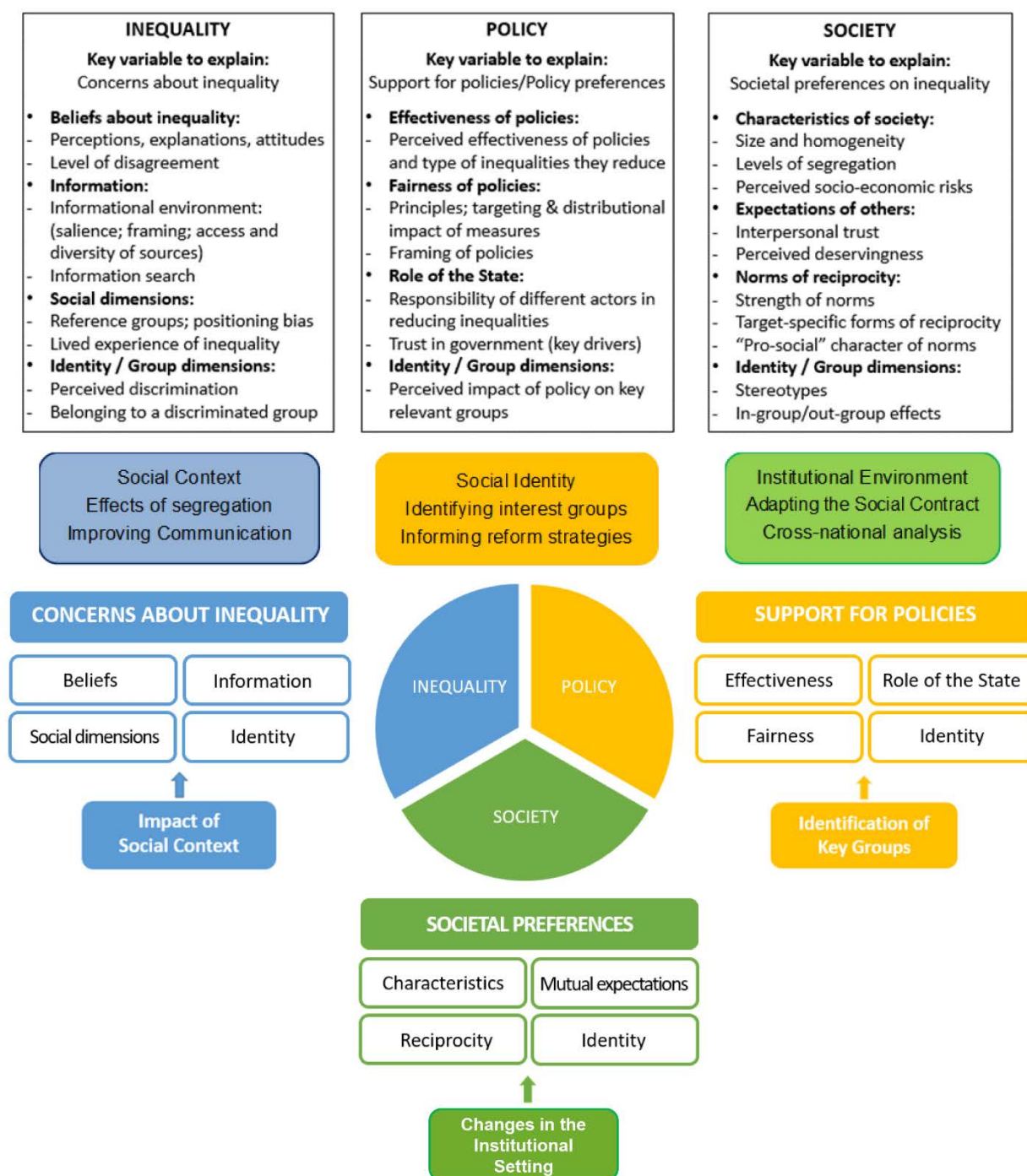
Note: This matrix is proposed as an analytical tool and example of a structured framework for classifying inequality-reducing policies and understanding how they may be perceived. The policies included in the matrix are based on the options provided to respondents in the Opportunities module of the 2022 *Risks that Matter* survey and should not be taken as recommended policies or as a reflection on the economic efficiency and effectiveness of these policies in reducing inequalities (“*protecting national businesses from international competition*” may for example result in higher prices for consumers and lower productivity growth if competition is reduced, with potential regressive effects on the distribution of income). The classification of policies also presents challenges given the diversity of measures, their scope and the possible interlinkages between them. As such, the classification shown here is for illustrative purposes only and is not meant to be exhaustive or definitive. Source: OECD (2023^[45]), “Working hand in hand? Exploring people's views of the role of different actors in fighting inequality”, *OECD Policy Insights on Well-being, Inclusion and Equal Opportunity*, No. 13, OECD Publishing, Paris, <https://doi.org/10.1787/dbd54315-en>, adapted from Rodrik and Stantcheva (2021^[46]), “A Policy Matrix for Inclusive Prosperity”, *NBER Working Paper Series No. 28736*, National Bureau of Economic Research, <https://www.nber.org/papers/w28736>.

In parallel, the main contextual variables that contribute to shape the explanatory factors and influence the key output variable in each block can be integrated into the analysis. Several “filters” of this kind can be identified:

- **Block 1: *The social context*** may influence the way in which people learn about and experience inequality, thereby shaping their perceptions, reference points and attitudes relating to inequality independently of the question of their access to information. Reference groups notably play a role in determining how individuals perceive their position within the income distribution and what forms of inequality they consider to be “fair” or not (Cruces, Pérez Truglia and Tetaz, 2013^[47]; Karadja, Möllerström and Seim, 2017^[48]; Hvidberg, Kreiner and Stantcheva, 2023^[49]). Similarly, when societies are highly segregated, experience and understanding of inequality may differ widely based on social context, contributing to a greater dispersion of views (Mijs, 2018^[2]; Mijs and Roe, 2021^[9]). By shedding light on the contextual conditions of belief formation and belief change, analysis of the social context can help improve communication on inequality by selecting tools and methods that are more likely to ensure people integrate reliable and generalisable information into their views.
- **Block 2: *Social identity*** may contribute to shape policy preferences relating to inequality, due to the fact that (i) people care about “horizontal” forms of inequality between groups as well as “vertical” forms between individuals; and (ii) groups and social identity have a mediating effect on the way in which individuals perceive their own interest and goals (Klor and Shayo, 2010^[50]; Costa-Font and Cowell, 2015^[51]). Mapping clusters of attitudes and beliefs and exploring the degree to which they overlap or not with socio-demographic characteristics can help shed light on relevant forms of social identity. Connecting social identity, measured in this way, with support for policies may help better identify key interest groups, particularly in a context where socio-economic characteristics do not fully explain the variance in individuals’ beliefs and preferences. Understanding to what extent support for policies is tied to different groups and what are the key characteristics of these groups is likely to provide useful insights for designing reform strategies that elicit public support.
- **Block 3: *The institutional environment*** plays an important role in explaining societal preferences regarding inequality and the expectations people have of policies. Institutions both reflect and shape beliefs about society and collective attitudes towards risk sharing (Esping-Andersen, 1990^[52]; Alesina, Glaeser and Sacerdote, 2001^[53]). They also frame public debates and available policy options. “Informal” institutions, such as conventions and social norms, also need to be included here as they contribute to anchor the mutual expectations people have of each other. Analysing the relation between changes in the relevant policy settings, the evolution of social norms and collective attitudes towards risk sharing can help better understand (i) whether policies designed to reduce inequality are well aligned with societal preferences, both in terms of the scope and type of policies used; and (ii) how these views and expectations evolve over time, including in response to changes in policy settings.

A visual representation of the conceptual framework is presented in Figure 1.8.

Figure 1.8. A conceptual framework for analysing the formation of policy preferences in the area of inequality – Blocks, key factors and contextual variables



Source: OECD Secretariat.

1.3. How can the conceptual framework be operationalised? An agenda for measuring the public acceptability of inequality-reducing policies

Several steps are needed to operationalise the conceptual framework described above. This includes (i) identifying a list of appropriate indicators to “populate” the different blocks; (ii) establishing the key factors for measurement; and (iii) defining a “cost-effective” strategy for doing so. To this end, Section 1.3.1 below sets out priority areas for measurement, as suggested by the Expert Group. Section 1.3.2 presents some of the recommendations made by the Expert Group on how to measure key factors effectively. Taken together, these two sections outline a possible agenda for operationalising the framework and measuring the public acceptability of policies designed to reduce inequalities.

In addition, a short review of the existing data landscape was conducted. The review details the types of indicators available and generally used to measure the different factors included in the framework. It also maps these indicators with relevant OECD data collection instruments (Risks that Matter survey, Compare Your Income webtool, Drivers of Trust in Public Institutions survey, pilot Survey on International Attitudes towards Climate Policies...). The results from this review can be found in Annex 1.B. A preliminary assessment of the quality and reliability of these indicators is provided in Annex 1.C.

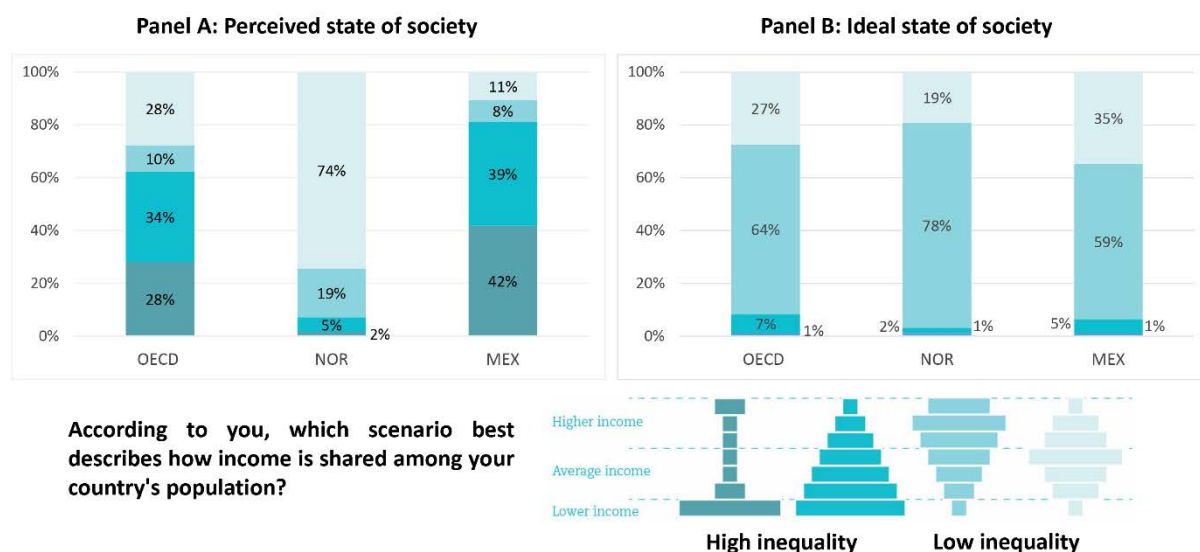
1.3.1. Identifying the main factors to measure

The conceptual framework provides a model of the process through which policy preferences relating to inequality are formed and a way to organise the increasingly rich and detailed picture that can be drawn from perceptual and behavioural data. While comparable data may not be easily available for all of the subjective determinants of public acceptability covered in the framework, it is possible to identify key factors for the analysis that should be measured in priority. Based on the input received from the Expert Group, priority variables to measure include, but are not limited to:

- **Fairness principles and beliefs:** This covers the general principles through which people assess whether situations and policies are fair or not, as well as the associated beliefs on the extent to which “*what is*” differs from “*what ought to be*”. Fairness principles apply both to existing policies and to new or proposed policies. An important point to note is that the relevant principles differ across policy areas. As described in the previous section, particular attention should be given to the distinction between “*meritocratic*” and “*structuralist*” beliefs, as well as to *reciprocity* beliefs (see p.23 above).
- **Intensity of policy preferences:** This variable is important to measure as it may not be linked in straightforward fashion to the expected or actual material effects of a policy on an individual’s own welfare. In this respect, the politically relevant constituencies for any specific reform (e.g. the groups most likely to mobilise in support of or in opposition to it) may not overlap with a simple definition of “winners” and “losers” in economic terms.
- **Perceived stakeholders vs. actual stakeholders:** Assessment of the expected distributional impact of policies can help identify key stakeholders by providing information on questions such as: “*Who is likely to be affected by a policy?*”, “*How?*” and “*Where will the costs, benefits, risks and opportunities be concentrated?*”. This should be complemented by analysis of public perceptions on these questions in order to identify possible mismatches between the actual and imagined groups that will be impacted by reform.

- **The ethnic-racial dimensions of policy issues relating to inequality:** Broader structural elements that contribute to shape attitudes towards inequality also need to be brought into the analysis. In particular, group dynamics and ethnic-racial resentment may influence policy preferences and lead to a “racialisation” of issues linked to redistribution and social protection. Evidence of this can notably be seen in the gaps between perceived and actual reliance on government transfers by native and foreign-born populations, which vary significantly across countries and across demographic groups (see Figure 1.6 above).
- **People’s understanding and evaluation of “the state of society”:** While properly delivered information can lead people to adjust their existing beliefs, evidence suggests that public engagement with quantitative detail is limited. Conversely, people’s understanding and evaluation of the status quo constitute important “reference points” through which they assess the need for and desirability of policies that will affect the state of society. With regard to levels of inequality, OECD evidence indicates (i) that people tend to disagree less on their “vision for society” (i.e. their goals and what the ideal state of society should look like) than on the “actual state of society” and how far removed it is from that ideal (see Figure 1.9); and (ii) that disagreement over the extent of inequality increasingly reflects differences in perceptions *within* socio-economic groups (see Section 1.1.1).
- **A focus on people’s risk preferences:** Evidence suggests (i) that people may often care as much about socio-economic risks as they care about inequality *per se*; (ii) and that they consider the management of these risks to be a key function of the welfare state. This implies that attention be given to economic insecurity and social protection as policy objectives and levers that are likely to strongly influence the public acceptability of policies, as well as people’s evaluation of and trust in government. Furthermore, a large amount of inequality reduction at a particular time comes as a by-product of the reduction of risk over the life-course.
- **Policymakers’ perceptions of public attitudes:** Evidence suggests that mismatches between actual public attitudes and policymakers’ perceptions of public attitudes may be large in some countries and should be studied. Beyond the issue of how “representative” policymakers are of average citizens, several structural factors may help explain these mismatches. The nature of political debate may lead policymakers to focus on differences between “visions for society”, while the public may disagree more in terms of how they perceive the “state of society” (see point above). Similarly, policymakers may underestimate the importance people give to procedural fairness and equality of opportunities and overestimate the importance of equality of outcomes (see point above on risk preference). A further relevant question to consider is to what extent growing demand for citizen participation may change the traditional and asymmetric relation between “policymakers” and the public seen as simple “policy-takers”.

Figure 1.9. People disagree more on "what is" than on "what ought to be" in terms of inequality



Note: Users were asked to describe (i) the actual distribution of income in their country; and (ii) the distribution of income they would prefer, by choosing between the 4 diagrams on the bottom right. These diagrams were selected to represent typical forms of income stratification that reflect high inequality (darker colours) and low inequality (lighter colours). This information (High inequality / Low inequality labels) was not shared with users. The figure presents the results for Mexico, Norway and the OECD average for the perceived actual distribution of income (Panel A) and for the preferred distribution (Panel B).

Source: Data from OECD (2020), Compare Your Income webtool, <https://www.oecd.org/en/data/tools/compare-your-income.html>.

1.3.2. Measuring these factors efficiently

The operational value of the framework depends not only on the feasibility but also on the efficiency of measurement. Attention must therefore be given to the way in which data are collected and measurement is administered. This implies assessing the cost-effectiveness of different available methods for measuring the key factors identified, as well as the quality and relevance of the data generated. Here, the Expert Group provided a number of recommendations designed to help guide data collection and measurement efforts. As noted above, a review of available indicators (Annex 1.B) and a preliminary assessment of their quality and reliability (Annex 1.C) are included at the end of this chapter.

In advancing the agenda for measuring key subjective factors, the following recommendations can help ensure greater efficiency and relevance:

- **Where relevant, appropriate survey methods should be used** to obtain precise and robust information about individuals' preferences and their decision-making process. For example, discrete choice experiments can be used to measure the relative importance of a set of options, the valuation of multiple dimensions and the trade-offs between them (OECD, 2018^[54]) and quadratic voting methods can be used to measure the intensity of attitudes and preferences (Cavaillé, Chen and Van der Straeten, 2024^[55]).
- **Bringing administrative data and broader economic data into the analysis** provides a better sense of the lived experience of the populations whose perceptions and beliefs are studied.²²
- **In this perspective, better use can be made of existing survey data** by integrating it with:
 - *Geo-spatial political-economic data* to know more about people's context and the places where they live;

- *Administrative data*, which is easy to access in some countries and constitutes an underexploited resource for research, but raises issues in terms of confidentiality and identifying what information to use;
- Adding survey questions to economic long-term panel data, as for example with added modules in the European Union Statistics of Income and Living Conditions (EU SILC) and the German Socio-Economic Panel (SOEP). These survey questions can be used to assess the relation between people's life circumstances (including social mobility and economic insecurity) and their views; and
- Data from survey experiments, which can be useful in evaluating policies and understanding their causal effects and consequences.
- **Consolidating and merging existing datasets** should take priority over the creation of new surveys. Doing so will maximise continuity and provide a longitudinal perspective that can help better understand trends and patterns over time.
- **Lessons can be learnt from good practices**, such as for example efforts conducted under the UK Office of National Statistics' [Inclusive Data Taskforce](#) to improve the collection of data on the public's lived experience of inequality and inclusion and increase the capacity for intersectional analysis.
- **The OECD has a role to play in advancing the agenda on measuring policy-relevant subjective factors**, notably by facilitating the harmonisation of data on perceptions and attitudes and their integration with national data.

1.4. Possible next steps for this work

As a possible follow up, the application of the conceptual framework could be supported by the setting up of an **OECD Perceptions Database** to compile key perceptual and behavioural data from different OECD tools and other main sources. The aim of this *Perceptions Database* would consist in collecting and harmonising data on key factors identified under the conceptual framework as a resource for (i) the comparative analysis of relevant perceptions, attitudes and policy preferences across OECD countries; and (ii) improving the OECD's advice on policies designed to reduce inequalities through a more detailed and tailored focus on important factors that contribute to influence the demand for and response to these policies in specific national contexts. A *Perceptions Database* would complement existing "objective" indicators on inequality collected notably through the OECD's *Income Distribution Database*, *Wealth Distribution Database* and *How's Life? Database*. In doing so, it would contribute to increase the value and policy relevance of these indicators by providing a more systematic basis for the type of analysis conducted in (OECD, 2021^[1]). A *Perceptions Database* would also contribute to support the OECD's broader work on the political economy of reform by helping harness the relevant insights on public acceptability from perceptual and behavioural data (see Chapter 2).

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Annex 1.A. The OECD Observatory on Social Mobility and Equal Opportunity – Advancing the agenda on measurement

Building on the conclusions from *Does Inequality Matter?*, the OECD is contributing to advance the research agenda on two complementary fronts. On the data collection and analytical side, the [OECD Observatory on Social Mobility and Equal Opportunity](#) has extended the work done in (OECD, 2021^[1]) by exploring people's perceptions, attitudes and preferences relating to equality of opportunity and their implications for public policy. In parallel, the OECD Expert Group on New Measures of the Public Acceptability of Reforms has sought to strengthen the conceptual basis of the OECD's work by improving its understanding of the process through which policy preferences relating to inequality are formed (see Chapter 1).

The OECD Observatory on Social Mobility and Equal Opportunity aims to fill important knowledge gaps and provide a broader picture of how people perceive inequalities and the policies designed to reduce them. Among the main gaps to address, international surveys do not collect data on people's preferences for policies relating to "opportunities" and pre-distribution to the same extent as they do for policies aimed at "levelling outcomes" and redistribution. Other important areas to develop include the collection of geospatial data and better data on urban/rural differences. As part of its activities, the Observatory seeks to develop new data and indicators on social mobility, equality of opportunity and the key determinants that contribute to them throughout the life-cycle. These determinants include changes in early childhood investment and inequalities in child well-being, the role of inherited wealth and the impact of discrimination. In addition, the Observatory collects relevant data on public perceptions of social mobility and equality of opportunity, as well as on public preferences regarding the measures needed to promote them. Where possible, it will connect this evidence on public perceptions and preferences with conventional statistical indicators.

Broadening the analysis beyond income inequality is crucial for understanding why inequality matters to people and how it can be addressed. As the OECD has highlighted on many occasions, equality of outcomes and opportunities are two sides of the same coin and they need to be thought of and fostered jointly (OECD, 2018^[56]; 2018^[57]). The connection between the two is particularly clear in the case of social mobility, as present inequality in outcomes contributes to frame future opportunities (OECD, 2015^[58]; 2018^[59]). *Does Inequality Matter?* confirmed that the link between outcomes and opportunities is also reflected in public perceptions and contributes to shape attitudes towards policies for reducing inequalities. In this respect, people care about inequality of both outcomes and opportunities, but their policy preferences tend to depend on which type of inequality is perceived as most salient (OECD, 2021^[1]). The work being conducted under the auspices of the Observatory constitutes an important step towards developing a richer and more realistic picture of how the public understands inequality and what shapes support for actual policies designed to reduce inequality.

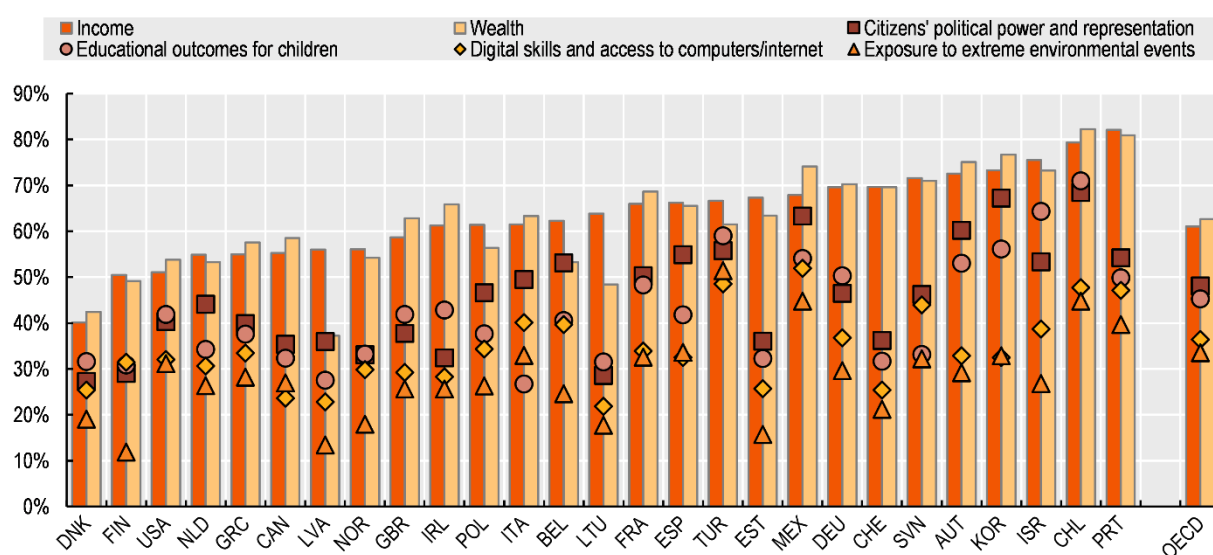
To collect evidence on public perceptions of social mobility and equality of opportunity, a specific module focusing on opportunities was included in the 2022 wave of the OECD's [Risks that Matter cross-national survey](#) (see Box 1.A1 at the end of this Annex). A series of policy briefs on [Measuring opportunities: The role of public perceptions](#) highlights the main insights from the data collected through this module. These data shed light on some of the key questions already raised by *Does Inequality Matter?* regarding preferences for redistribution:

- The first brief provides evidence on public attitudes towards the role played by effort and other causal factors in explaining social mobility (OECD, 2023^[60]);
- The second brief looks at public perceptions of the role of different actors in reducing inequalities (OECD, 2023^[45]);
- The final brief in the series explores public preferences for policies and actions (OECD, 2023^[61]).

Key takeaways from these three briefs include confirmation that people's concerns about inequality extend beyond economic resources. According to data from the Risks that Matter Opportunities module, inequalities in income and wealth are of primary concern, with 60% of respondents on average declaring that they are too high or far too high. However, inequalities of opportunity and access also matter, with around half of the respondents considering for example that inequalities in children's educational outcomes or in political power and representation are too high or far too high (see Annex Figure 1.A1).

Annex Figure 1.A1 Concerns about inequality are not limited to economic resources

Percentage of respondents thinking that inequality is far too high or too high in their country, by domain of inequality, 2022

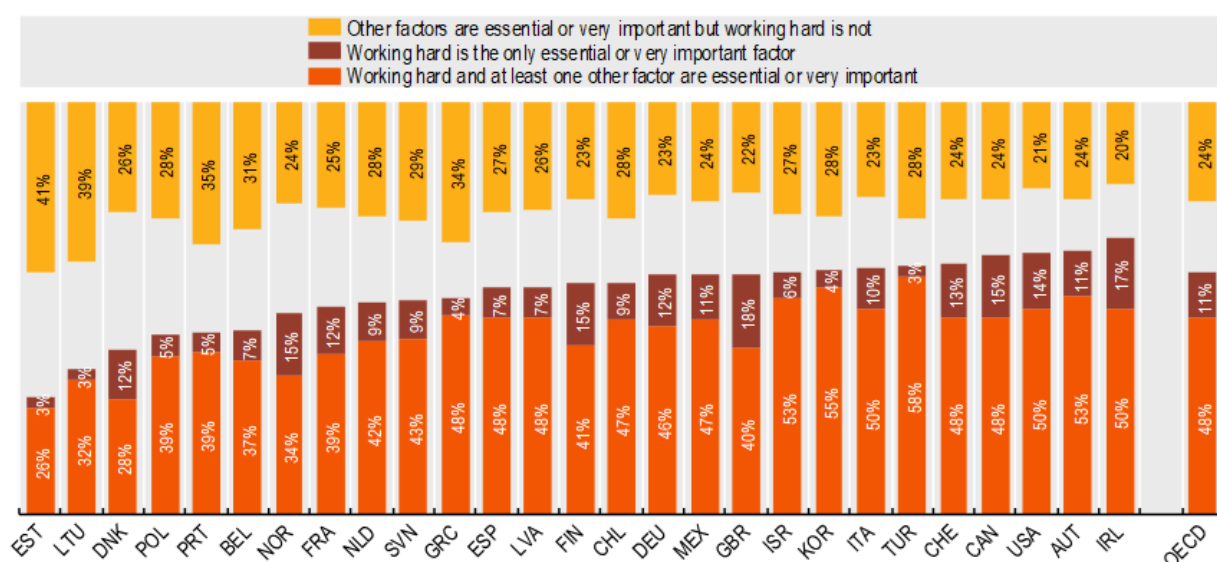


Source: OECD (2023^[45]), Opportunities module of the OECD Risks that Matter Survey 2022, <http://oe.cd/rtm>.

Similarly, people's views about the causes of inequality are complex. While hard work is often viewed as very important, it is rarely considered to be the only condition for success. On average, around 60% of respondents believe that hard work is essential or very important in determining one's chances to get ahead in life. However, among this group, only a small proportion – one-fifth on average – consider that it is the sole factor of success (see Annex Figure 1.A2). Socio-economic background and individual characteristics relating to identity are also perceived as important determinants of success by a large share of respondents. Furthermore, significant divides can be observed between different groups in terms of their beliefs about the causes of inequality. For example, younger respondents and minorities are much more likely to view traits linked to identity as determinants of success.

Annex Figure 1.A2 Hard work is often seen as an important factor of success, but rarely as the only one

In your country, nowadays, how important to you think each of the following factors is for an individual to get ahead in life? Distribution of responses, by country, 2022



Note: Data from the Opportunities module relate to respondents aged 18-64. Respondents were able to choose from among the following options: "A person's ethnicity, skin colour or language"; "A person's religion"; "A person's sex"; "A person's sexual orientation or gender identity"; "Coming from a wealthy family"; "Having well-educated parents"; "Being born in the country where you live"; "The neighbourhood, town or territory where a person grew up"; "A person's health status or disability"; "Working hard". Countries are ranked in ascending order of the cumulative share of respondents reporting that hard work is very important or essential. The OECD average refers to the weighted average of the 27 OECD countries for which data are available.

Source: OECD (2023^[60]), Opportunities module of the OECD Risks that Matter Survey 2022, <http://oe.cd/rtm>.

Annex Box 1.A1 The Opportunities module of the 2022 OECD Risks that Matter (RtM) survey

Launched at the 2018 Social Policy Ministerial, the multi-country OECD Risks that Matter survey asks people about their perceptions of economic risks, their satisfaction with social programmes, and their preferences for social protection going forward. Since 2018, RtM has been conducted every two years and now covers over 27 000 respondents in 27 OECD countries. The latest wave was conducted in November 2024. The results and main findings from previous waves are published in (OECD, 2019^[62]; 2021^[63]; 2023^[64]).

The 2022 wave covered the following 27 OECD countries: Austria, Belgium, Canada, Chile, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Israel, Italy, Korea, Latvia, Lithuania, Mexico, the Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Switzerland, Türkiye, the United Kingdom and the United States.

Most of the questions in RtM have been asked in prior waves to allow reporting on changes in the overall views of the general public. Other questions are part of ad hoc modules that can be replaced to prioritise topical issues or emerging concerns. For instance, the 2020 wave of RtM included questions on individuals' experiences during the pandemic. In 2022, three ad hoc modules were introduced, focusing on (a) the cost-of-living crisis (OECD, 2023^[65]); (b) climate change; and (c) social mobility and equal opportunities (e.g. the Opportunities module). The 2024 wave continues to ask core questions about perceptions of economic risk and social protection. It also includes new modules on the gender wage gap, technological advances in social programme delivery, and social policy preferences related to the climate and digital transitions.

The Opportunities module focuses on four main thematic areas identified as lacking comparable information: (i) the relative importance of different aspects of inequality, (ii) people's views on the factors shaping equality of opportunity, (iii) people's views on the role different actors play in reducing inequality and on the type of policies and actions to prioritise, and (iv) experienced and perceived discrimination and support for pro-inclusion policies. Evidence from the Opportunities module will also contribute to the data collection efforts of the [OECD Observatory on Social Mobility and Equal Opportunity](#) and to additional projects of the OECD Centre on Well-being, Inclusion, Sustainability and Equal Opportunity (WISE) – e.g. on measuring equity and discrimination.

The 2022 RtM questionnaire was developed by the OECD Secretariat in collaboration with OECD member-country Delegates and stakeholders who participated in a technical workshop in April 2022. It was subsequently translated into national languages. Consistent with similar surveys, RtM is implemented online using non-probability samples recruited via internet and over the phone. The survey contractor is Bilendi Ltd (formerly ResponDi Ltd). Respondents are paid a nominal sum of two euros per survey. Sampling is conducted through quotas with sex, age group, education level, income level and employment status (in the last quarter of 2019) used as the sampling criteria. Survey weights are used to correct for any under- or over-representation based on these five criteria. The target and weighted sample is around 1 000 respondents per country. Financial support for the 2022 survey was provided through voluntary contributions by participating OECD member-countries, the OECD Secretariat, Amundi (which sponsored the development of the Opportunities module), Kings College London and the University of Stavanger.

Annex 1.B. Measuring the factors listed in the conceptual framework: The data landscape

This Annex provides a short review of the types of indicators available and generally used to measure the different factors included in the framework and identifies existing gaps. It also maps these indicators with relevant OECD data collection instruments (Risks that Matter survey, Compare Your Income webtool, Drivers of Trust in Public Institutions survey, pilot Survey on International Attitudes towards Climate Policies).

Block 1: Inequality

Beliefs about inequality

There are two main types of measures used in the literature to assess the **perceived magnitude, salience and degree of concern about inequality**: simple Likert-scale-based measures and elicited estimates from respondents. The following examples can be found in practice:

- Mijs (2021^[66]) asks respondents the extent of their agreement with the statement “*Income differences [in my country] are too high*”, with answers ranging from strongly agree to strongly disagree. This item measures concerns about inequality.
- García-Sánchez et al. (2020^[67]) and the *International Social Survey Programme* (ISSP) in general ask respondent to provide an estimate of the salary of a low-status worker (e.g. a factory worker) and a high-status one (e.g. a CEO). This allows researchers to compute a measure of the magnitude of perceived inequality.
- In similar fashion, Pontusson et al. (2020^[40]) and the Inequality & Politics Survey ask respondents to provide their estimates of the income ratio between the 10th and 50th percentiles, and between the 90th and 50th percentiles.
- Other items like the ones featured in the Inequality & Politics Survey ask respondents to assess whether inequalities in educational opportunities have got worse or better over the last 20 years using a Likert-scale.
- Finally, the Inequality & Politics Survey assesses the salience of inequality in the following way: respondents are presented with a series of politically relevant topics, including economic inequality, and asked to rate them from 1 (not important at all) to 5 (extremely important). See Figure 1.7.

Looking at the measures used in OECD surveys and data collection tools:

- The **Compare Your Income** webtool asks respondents about their perceptions of and preferences regarding the shape of the income distribution, as well as their perceptions of the level of income of poor households.
- The **Risks that Matter** survey explores people’s perceived degree of job and income mobility, opportunities and economic insecurity through a range of questions designed to assess the socio-economic risks they face and their evolution over time, the degree of financial support they can count on, and the financial situation and prospects of their household as well as the overall economic situation of their country. The **Opportunities module** included in the 2022 wave of the survey (see Box 1.A1 for more detail) asks respondents to assess the level of inequality in a wider range of areas covering outcomes and opportunities (income; wealth; political power and

representation; educational outcomes for children; digital skills and access to digital technology; exposure to extreme environmental events) using a 5-point Likert scale.

- The **Survey on International Attitudes toward Climate Policies** features the question “*How big of an issue do you think income inequality is in [your country]?*”

Questions about **causal explanations and justifications of inequality** either focus on the belief in the importance of specific structural factors, or on a rating or ranking of multiple factors covering individual, structural and cultural processes.

- For instance, the European Social Survey (ESS) and the Inequality & Politics Survey (Pontusson et al., 2020^[40]) both ask respondents whether they agree that rising inequalities are a direct by-product of technological change and whether they agree that inequalities promote economic growth. These are both typical justifications used to support tolerance for inequalities.
- The General Social Survey (GSS) and the ISSP include questions where respondents are asked to rate the importance of several factors explaining why people are either poor or (in other questions) “*getting ahead in life*”. Factors include individually-controlled meritocratic ones (like “*talent*” and “*hard work*”) and structural ones (like ethnic and/or gender discrimination) (Mijls and Hoy, 2022^[68]). Risks That Matter features questions about people’s perceived degree of economic mobility and economic opportunities. This matters as these perceptions contribute to the perceived fairness of inequalities, as well as to the causal narratives individuals form about inequality.

Looking at OECD surveys and tools:

- The **Opportunities module** in the 2022 **Risks that Matter** survey introduces direct questions designed to elicit people’s beliefs regarding the causes of inequality (“*How important do you think each of the following factors is for an individual to get ahead in life?*”). Interestingly, more specific questions are also targeted at the “rich” and the “poor” (“*In your opinion, if a working-age person’s income is low [high], which is most often the reason?*”) focusing on “lack of effort” vs. “circumstances beyond one’s control”.

A third important set of questions cover **beliefs and attitudes towards poverty, inequality and equality of opportunity**:

- Bullock (2008^[69]) gives participants a large questionnaire combining multiple scales in order to get a deeper understanding of the factors individuals attribute poverty to, covering individual, structural, “fatalistic” and cultural factors. Moreover, respondents’ attitudes towards inequality are also evaluated through a battery of questions eliciting beliefs on and attitudes towards inequality from Kluegel and Smith (1986^[70]). The latter ask respondents for the extent of their agreement with statements such as “*Incomes cannot be made more equal since people’s abilities and talents are unequal*”. This work is partly related to psychological studies measuring Locus of Control, Perceived Behavioural Control and Self-Efficacy with validated inventories and scales, as in Budria, Ferrer-i-Carbonell and Ramos (2013^[71]).

Information

One aspect to consider and measure, at a macro-level rather than at the individual level, is the general **media framing** of inequality as an issue:

- An important difference noted by Dietze and Craig (2021^[72]) is that individuals engage more with media and express greater support for inequality-reducing policies when inequalities are framed in terms of disadvantages for lower socioeconomic status (SES) individuals rather than advantages for higher SES individuals. However, common and generally agreed measures of media framing

are still lacking and require extensive manual coding or sophisticated Natural Language Processing (NLP) algorithms applied to Big Data scraped from the web.

- Another missing element is the change over time in the frequency of certain narratives and topics, which could require either manual coding or web scraping and the use of NLP algorithms.

Furthermore, there is a relative paucity of measures of **media consumption**:

- Traditional ones, as featured in the ESS, ask individuals to choose between categories of time spent on different media (e.g. television, newspapers...) and different topics (distinction between overall time spent and time spent specifically on news and politics-related programs), ranging from “no time at all” to “more than 3 hours” (Héricourt and Spielvogel, 2013^[73]).
- A type of information that is usually missing and poorly evaluated in large-scale surveys is the general orientation or slant of the content consumed by individuals: newspapers, social media feeds, and TV channels engage differently with the same topics. However, gathering internationally comparable data of this kind presents significant challenges, as it would probably require at a minimum creating harmonised political coding of content providers from many different countries and for different media.

Looking at OECD surveys and tools:

- The **Drivers of Trust in Public Institutions** survey includes a question on respondents’ regular sources of information (“*From which of the following sources do you get information about politics and current affairs at least once per week*”), with different possible sources listed.

Social dimensions

Individuals’ **economic position** and rank in the income distribution can be elicited and characterised in two broad manners:

- First, researchers can directly ask respondents to give an estimate of their income, whether in the form of a precise number or by selecting the income bracket they belong to. Similarly, respondents can be assigned to groupings by educational and occupational classes, using the CASMIN and ISCED classification schemes based on respondents’ self-reported education and occupation, as in Bucca (2016^[74]).
- Another important and complementary approach is to ask respondents where they believe they are situated in the social hierarchy. This second measure tends to be more predictive of individuals’ actual attitudes, decisions, and support for specific policies, as it reflects their subjective lived experience. For an example of this kind of measure, Bucca (2016^[74]) and Mijs (2021^[66]) use a 1 to 10 discrete scale with the following text: “*In our society, there are groups which tend to be towards the top and groups which tend to be towards the bottom. Below is a scale that runs from top to bottom. Where would you put yourself now on this scale?*”
- Building on this approach, measures of subjective social mobility can be constructed by comparing individuals’ perception of the position of their family growing up (“social origin”) and perception of their position at present (“social destination”). For example, Mijs et al. (2022^[75]) present respondents with the image of a seven rung “social ladder” (“*In our society there are groups which tend to be towards the top and groups which tend to be towards the bottom*”) and ask them first to place themselves on the ladder and second, thinking back on their childhood, to place the family in which they grew up.

Looking at OECD surveys and tools:

- **Compare Your Income** features questions about the perceived rank of the individual in the income distribution. This yields information on income position bias across countries (for example, do a

majority of respondents in each country place themselves around, above or below the median?). It also asks respondents about their perceived economic opportunities in the future. Finally, the survey features an informational experiment by showing individuals their actual place in the income distribution.

- **Trustlab** features classic socio-demographic variables, as well as questions about financial security. Specifically, it asks whether respondents believe their financial situation will remain the same, improve or worsen in the coming 12 months.

Another factor to consider when trying to understand an individual's perceptions of inequality is a respondent's ethnicity or **ethnic identity**:

- Alesina, Stantcheva and Teso (2018^[76]) find evidence in their survey of perceptions of economic mobility that African-Americans are more optimistic regarding their own prospects. The authors suggest two possible explanations for this finding. First, respondents may exhibit proof of System Justification Theory, meaning that individuals try to reduce cognitive dissonance when faced with an unjust and disadvantageous system. Second, they may compare themselves to members of their own communities. Hence, for individuals in statistically disadvantaged communities, individuals may have lower points of reference when assessing inequality and prospects. Ethnicity is typically measured in international surveys with simple questions where respondents self-assess their ethnicity and choose between multiple options, more or less granular.

Looking at OECD surveys and tools:

- The **Opportunities module** in the 2022 **Risks that Matter** survey includes a series of questions relating to discrimination. These questions cover perceived (*"Recently, have you witnessed discrimination or harassment?"*) and experienced (*"Have you ever felt discriminated against or harassed?"*) discrimination, as well as the prevalence (*"Thinking about your personal experiences over the past year, how often have you felt discriminated against or harassed?"*) and effects of discrimination.

Political orientation or **political identity** is another factor that acts as a potent filter in the information → perception → attitude pipeline:

- Alesina, Stantcheva and Teso (2018^[76]) suggest that conservative-leaning individuals are on average less confident in governments' competence and more optimistic about social mobility. The authors ask respondents to position themselves on the political spectrum with regard to economic policy, with answers on a 5-point scale ranging from *"very liberal"* to *"very conservative"*. Other surveys, such as the ESS, use a numeric discrete 11-point Likert Scale that is general and not domain-specific.

Looking at OECD surveys and tools:

- The **Drivers of Trust in Public Institutions** survey asks respondents about political attitudes and participation.¹ It uses 11-point scales to measure political efficacy through questions about individuals' general level of interest in politics, confidence in their ability to participate in politics, and perception of the degree to which people like them have a say in determining policy. It also includes items designed to measure individuals' actual political participation: voting, interaction with government, attendance of trade union meetings, signature of petitions... The survey does not include a direct question on political identity but does ask respondents whether the party they voted for at the last national election is currently in government or not.
- **Trustlab** uses a simple question asking respondents to position themselves on the political spectrum using an 11-point Likert-scale (0-10), ranging from Left to Right.
- The **Survey on International Attitudes toward Climate Policies** includes a series of questions on interest in politics, political participation and preferences (relating to candidates and parties),

and positioning on economic policy with candidates asked to situate themselves on a scale from 1 to 5, where 1 is Left and 5 is Right.

- The **Risks that Matter** survey asks respondents to position themselves within their national political spectrum (*“If a national election were held tomorrow, for which party would you vote?”*).

Block 2: Policy

Support for policies

Support for a specific policy can be measured fairly simply, with either a binary question or, better still, a question featuring a Likert-scale allowing individuals to signal the extent of their agreement or disagreement:

- Support for a specific policy can be measured fairly simply, with either a binary question or, better still, a question featuring a Likert-scale allowing individuals to signal the extent of their agreement or disagreement. For instance, de Groot and Schuitema (2012^[77]) ask respondents to rate policy using a discrete scale ranging from very unacceptable to very acceptable. It is important to directly measure the support for a policy rather than assume support for a policy if the individual generally agrees with its goal as “translation issues” are frequent.
- Another under-developed element in the literature is the comparison of perceived support by others for certain policies. This would require asking individuals to assess support for given policies by several reference groups and key figures.

Looking at OECD surveys and tools:

- The **Risks that Matter** survey features general questions designed to elicit respondents’ preferences for redistribution (*“Should the government tax the rich more than they currently do in order to support the poor?”*) and social protection (*“Do you think the government should be doing less, about the same, or more to ensure your economic and social security and well-being?”*). The **Opportunities module** included in the 2022 wave adds a similar question focusing on equality of opportunity, using the same scale.
- **Risks that Matter** also explores priorities and support for public spending across different areas of social policy (*“Would you like to see the government spend less, spend the same, or spend more in each of the following areas?”*). Interestingly, the survey seeks to assess willingness to pay: respondents are first asked whether they would want more provision given the costs involved (*“bearing in mind the taxes paid and the benefits received”*) and then asked the same question with a concrete price-tag (*“would you be willing to pay an additional 2% in taxes and social security contributions?”*).

Effectiveness of policies

The **perceived effectiveness of policies** can be measured as follows:

- The most straightforward way is to ask respondents in surveys to give their impression on how effective a policy would be at tackling a specific problem.
- A more complex perspective on the topic is described in Bolderdijk et al. (2017^[78]), as the authors argue for a reverse causality where respondents, finding a policy unattractive or unfair, would in turn doubt its potential effectiveness. Their results suggest that *“offering optimistic effectiveness estimates”* may not bolster support for a policy. Hence, measuring the perceived effectiveness of a policy precisely might be either impossible or yield little information.

Looking at OECD surveys and tools:

- In the **Drivers of Trust in Public Institutions** survey, the questionnaire explores respondents' perceptions of policies and public services by asking them to rate their satisfaction on a 11-point Likert-scale. The areas covered include education, healthcare and the quality of administrative services. The survey also asks respondents to rate public institutions on the five dimensions of the OECD Framework on Drivers of Public Trust in Institutions: Integrity, Responsiveness, Reliability, Openness, and Fairness (Brezzi et al., 2021^[79]). The questions on Responsiveness, Reliability and Openness cover perceptions relating to the quality, ease of access and effectiveness of both policies and public services. Finally, it includes questions on the government's perceived ability to address long-term and global challenges (including reducing inequality and discrimination, combatting climate change and managing migration flows).
- The **Risks that Matter** survey includes questions on satisfaction with the quality of and access to public services (including more specific questions on administrative burden) and on satisfaction with the level of protection provided against different sources of income loss. These are measured using 5-point scales.
- In **Trustlab**, the experimental setup includes a questionnaire featuring questions about respondents' degree of satisfaction with multiple public services, including the education system, the health care system, public transports, childcare services, welfare benefits, public housing, security and crime prevention, environmental services and cultural facilities. A question to raise however concerns the endogeneity of these measures: are individuals reporting their satisfaction with the efficiency or perceived legitimacy of the services? Also, one may ask whether respondents include collective, individual or a mix of considerations when answering the questions.
- **The Survey on International Attitudes toward Climate Policies** assesses respondents' views on the effectiveness of climate policies by asking them whether they agree or disagree with a series of policy goals and outcomes. It also asks them to rate the availability (ease of access and frequency) of public transportation where they live.

Fairness of policies

Maestre-Andrés, Drews and Van Den Bergh (2019^[80]) offer an interesting framework for measuring the **perceived fairness of a policy** by respondents in their literature review on the evaluation of carbon-pricing schemes. According to the researchers, a policy's fairness can be assessed through four clusters of measures:

- **Perceived distributional impact:** Respondents in the different studies are asked to estimate how different publics would be affected, which group would suffer the most or the least (rural vs urban households for instance). Also, some studies elicited opinions from respondents on whether the burden would be fairly shared between companies and households.
- **Perceived procedural fairness:** This cluster featured general questions about the trust of respondents in government, their level of information on the policies, their trust in the government's use of the funds raised by the carbon tax, knowledge about the actors involved in designing the policy...
- **Perceived impact on the respondents themselves:** Individual studies ask respondents to evaluate for instance whether the policies would endanger their jobs, reduce their purchasing power or well-being, limit their choices...
- **Perceived ends:** This includes questions about a government's intent and goal when implementing a policy. Respondents in studies are asked whether they think the carbon-pricing schemes are a means to increase tax revenues or mitigate climate change for instance.

Other considerations can be included to augment this framework: in particular, specific questions can be asked of respondents to understand their conceptions of fairness and their preferred redistributive impact. Pontusson et al. (2020^[40]) ask respondents to choose for multiple policies, like unemployment benefits, one of three distributional impacts inspired by the types of fairness distinguished by Pontusson et al. (2020^[40]): proportional to one's contribution (*equity principle*), equal for all (*equality principle*), targeted to the poorest households (*needs principle*).

Looking at OECD surveys and tools:

- In the **Risks That Matter** survey, respondents are asked whether they feel they receive “a fair share of public benefits” given their contributions. This question evaluates the proportionality dimension of fairness, as well as the “pocketbook” considerations that individuals may have. The survey also explores the reciprocity dimension of fairness (by measuring people's degree of agreement with the statement “Many people receive public benefits without deserving them”) and procedural aspects (through the degree of agreement with the statement “Government incorporates the views of people like me when designing or reforming public benefits and services”).
- The **Survey on International Attitudes toward Climate Policies** includes a question on respondents' degree of agreement with the statement that “[Carbon tax with revenue recycling] is fair”. It also assesses respondents' views on the distributional impact of a policy of carbon tax with revenue recycling by asking them whether they believe that their own household would win or lose financially under such a policy, and also whether different socio-demographic groups (Low-income earners/The middle class/High-income earners/People living in rural areas) would win or lose.
- The **Drivers of Trust in Public Institutions** survey asks respondents to rate public institutions on the five dimensions of the *OECD Framework on Drivers of Public Trust in Institutions* (see above). The questions on Integrity, Openness and Fairness cover a number of relevant perceptions relating to equal treatment, transparency, corruption, voice...

Role of the State

Individuals' perspectives on the extent of the **role of the state**, and more specifically on whether tackling income inequality and other forms of inequality is part of governments' responsibilities, tend to be evaluated in a simple and straightforward manner.

- For instance, in the ESS and the *Inequality & Politics Survey*, respondents are asked to rate the responsibility of multiple entities for economic inequalities, including the State and the European Union, on a scale ranging from 0 (no responsibility) to 10 (full responsibility) (Pontusson et al., 2020^[40]).
- Mijs, de Koster and van der Waal (2022^[81]) ask respondents if they think that “It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes”, while Mijs, Herrera Huang and Regan (2023^[82]) ask respondents whether they think “It is the government's responsibility to combat racial and ethnic discrimination”.

Looking at OECD surveys and tools:

- The **Opportunities Module** included in the 2022 wave of **Risks that Matter** asks respondents to rate the role and responsibility of a range of different actors in ensuring economic inequality remains at an acceptable level. These actors include different levels of government, the private sector and financial institutions, civil society organisations and individuals (both wealthy and ordinary). Respondents are then asked to identify priority actions for both government and the private sector (“Which of the following do you think are the most important in order to reduce economic inequality and/or foster equal opportunities in your country?”).

- The **Survey on International Attitudes toward Climate Policies** asks a general question on the preferred scope for government intervention in terms of the balance between public and private action (*“Some people think the government is trying to do too many things that should be left to individuals and businesses. Others think that the government should do more to solve our country’s problems. Which come closer to your own view?”*).
- The **Drivers of Trust in Public Institutions** survey asks respondents about priorities and preferred modes of government action for addressing global challenges (including unilateral and multilateral modes of action, greater international cooperation, engagement with the private sector and civil society...).

Trust in institutions

Trust in government may be too vague or insufficient to capture individuals’ perceptions of political authorities. In response to this limitation, the ESS provides an informative battery of questions to measure trust in institutions at multiple levels: the questionnaire asks respondents to rate their trust, on a scale between 0 and 10, in parliament, the legal system, the police, politicians, the European Parliament, and the United Nations. Other surveys, such as Eurobarometer, sometimes ask similar questions but distinguish between local and national government, which matters given that individuals tend to trust local authorities more (Fitzgerald and Wolak, 2016^[83]).

Looking at OECD surveys and tools:

- The **Drivers of Trust in Public Institutions** survey measures institutional trust using an 11-point Likert-scale. The institutions covered include national government, local government, the national parliament, police, the civil service, news media, the legal system and international organisations. As mentioned above, the survey includes questions aimed at understanding the determinants of trust in institutions from different perspectives: first, it asks them to rate governments and public institutions on the five dimensions of the OECD Framework on Drivers of Public Trust in Institutions: Responsiveness, Reliability, Integrity, Openness, and Fairness. Second, the survey includes questions asking respondents to rate their satisfaction with services and the governments’ efforts to tackle long-term global challenges.

Identity and groups

Again, **individual identity** tends to interact with many of the metrics cited above. Alesina, Stantcheva and Teso (2018^[76]) provide an example illustrating this. Results from their survey suggest for instance that liberals and conservatives differ strongly in their views on government efficiency, favoured policies, preferences for the extent of government intervention...

Another aspect currently lacking in the literature is the heterogeneity in **perceived group-specific impacts** of policies. As noted earlier, individuals’ perception of a policy’s efficiency is strongly associated with their support for a policy and the fairness they attribute to that policy. Hence, support for a policy seems generally to align with one’s own perceived interest. The development of “**representative personas**” (e.g. archetypes of the most relevant groups) can constitute a useful tool for taking account of the group-specific impacts of policy at the design stage and for communicating on these impacts (Schäfer et al., 2019^[84]).

- Little is known about the trade-offs individuals are willing to make between their own interest and that of other groups. This latter question remains underdeveloped and could provide a link between measures of perceived policy trade-offs (like the one between inequalities and economic growth Pontusson et al. (2020^[40]) ask respondents about) and perceived differences in fairness in the way institutions treat groups. For example, Buckler and Higgins (2016^[85]) ask respondents whether they believe the police acts fairly towards different ethnic groups, before measuring their support for “Stop & Frisk” policies). An ideal survey could fill this gap with questions measuring the perceived

fairness or benefits of a policy for different sub-groups and a final measure of general policy support.

Looking at OECD surveys and tools:

- The **Opportunities module** in the 2022 wave of **Risks that Matter** introduces questions relating to the broader theme of discrimination, including support for efforts to combat different grounds of discrimination (“*Do you think that efforts made to fight discrimination against the following grounds have gone too far or not far enough?*”) and support for specific measures designed to foster diversity and combat discrimination.

Block 3: Society

Characteristics of society

The **demographic structure of a society**, and in particular its ethnic composition, appear to be meaningful factors in determining policy preferences.

- Several studies for example show a negative relationship between ethnic diversity at a local level and support for redistributive policies (Alesina, Stantcheva and Teso, 2018^[76]; Algan, Hémet and Laitin, 2016^[86]). An interesting metric to measure this phenomenon is the “fractionalisation” described by Alesina et al. (2003^[87]), which can be used for ethnicity, language and religion.
- Other measures, like the Multigroup Theil Index used in Alesina, Stantcheva and Teso (2018^[76]), also exist and are described in Reardon and Firebaugh (2002^[88]). These metrics are computed using demographic data, often drawn from census sources or household surveys.

Expectations of others

Trust in others is a major predictor of functioning societies:

- Pitlik and Rode (2021^[89]) report analyses of large international surveys, suggesting that generalised social trust predicts moderate political attitudes regarding government intervention and redistribution. This generalised measure of social trust is usually a self-reported question, such as the one from the ESS and GSS: “*Generally speaking, would you say that most people can be trusted or that you can’t be too careful in life*”. Answers include “yes”, “no” and “depends” (Reeskens and Hooghe, 2008^[90]). Other variants include more granular Likert-scales.
- However, one needs to be careful regarding the validity of self-reported measures of generalised trust: Murtin et al. (2018^[13]) conclude from the Trustlab experiments that “*Self-reported measures of trust in others capture a belief about trustworthiness (as well as altruistic preferences), whereas experimental measures [sending money to other participants in the hope of a higher payoff in a trust game] instead capture willingness to cooperate and one’s own trustworthiness. Therefore, both measures are loosely related and should be considered complementary rather than substitutes*”. Hence, mixed methodologies (experiments and surveys) might ultimately be more appropriate to measure trust, although more expensive and time-consuming.

Looking at OECD surveys and tools:

- In practice, **Trustlab** combines questionnaires with economic games, allowing researchers to obtain self-reported as well as behavioural measures for various traits. With regards to trust in others, Trustlab includes multiple measures, both self-reported and experimental/behavioural. Self-reported measures capture individuals’ expectations of cooperation from others, with some of the traditional questions, as well as a new experimental one: “[*Participants start with an endowment of 10 Euro. Imagine you sent 5 Euro, so Participant B receives 15 Euro, making his or her total*”

budget 25 Euro. Participant B has no information about your identity. What amount would you expect Participant B to return to you?" The behavioural measure of trust on the other hand is determined by the amount of money participants transfer to the other players during a trust game. The 2020 experiment investigates heterogeneity in trust by giving participants information about the other players, including their ethnicity as well as their income. Hence, trust games can allow for the observation of differences between general trust and group-specific trust.

- As with institutional trust, the **Drivers of Trust in Public Institutions** survey includes a simple measure of interpersonal trust using an 11-point Likert-scale and the following question: *"On a scale from zero to ten, where zero is not at all and ten is completely, in general how much do you trust most people?"* As explained by Murtin et al. (2018^[13]), this indicator measures individuals' expectations vis-à-vis other members of society but may be an inappropriate proxy for behavioural manifestations of trust in others.

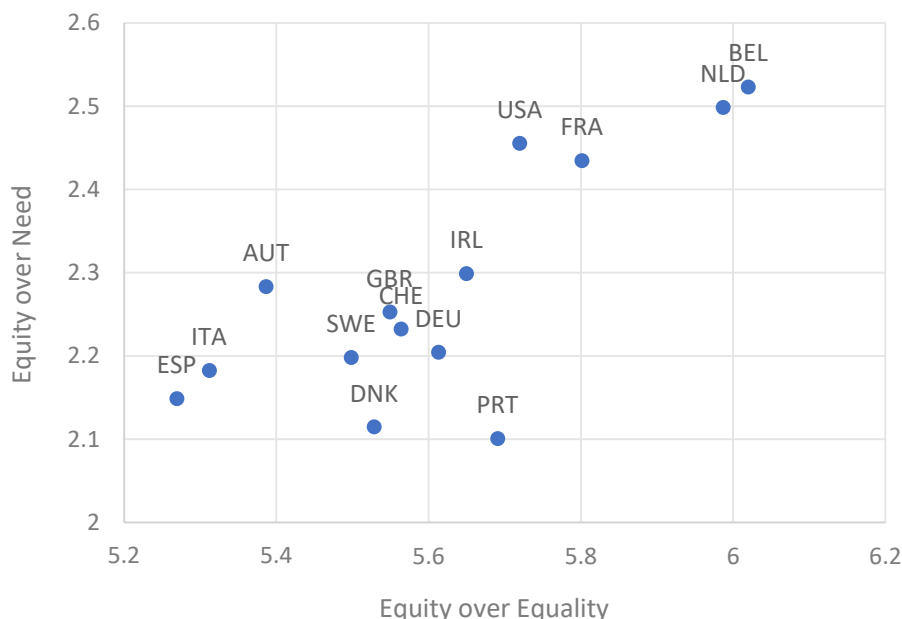
Group-specific trust also plays a role in predicting support for redistribution and other policies:

- Cetre et al. (2020^[39]) also use **Trustlab** to measure class and ethnic biases in behavioural trust. Although results suggest the existence of discrimination in cooperative games, and thus lack of trust, towards certain specific minorities, full results also suggest intra-ethnic distrust based on class differences and potentially class resentment. Hence, regardless of ethnicity, wealthier individuals are more trusting towards each other. Such a target-specific measure of trust could also be adapted with self-reported measures, although there would be a high-risk of social desirability bias in the self-reported answers.

Norms of reciprocity (and fairness more generally)

More than just the degree of reciprocity, societies differ in terms of the type and prevalence of social norms. This can be explored for example by looking at support for the different types of fairness principles described by Konow (2001^[91]). Pontusson et al. (2020^[40]) offer a visually striking illustration of these differences by plotting support for equity over need, against support for equity over equality, averaged by country (see Annex Figure 1.B1).

Annex Figure 1.B1 Relative support for equity, equality and needs-based fairness, by country



Note: To assess their support for the needs principle relative to the equity principle and support for the equality principle relative to the equity principle, respondents were asked: (i) to indicate the extent of their disagreement or agreement with the statement that “a society is fair when it takes care of those who are poor and in need regardless of what they give back to society,” with response categories ranging from (1) “strongly disagree” to (5) “strongly agree”; and (ii) to place their view of a “fair society” on a scale from 0 to 10, where 0 means that there are no income differences as rewards for individual efforts and 10 means that such differences are large. The figure maps answers to these two questions by country in a two-dimensional space with higher values corresponding to preferences for the equity principle over the equality principle (on the x-axis) and over the needs principle (on the y-axis). Answers to the question about needs have been inverted such that 1 stands for “strongly agree” and 5 stands for “strongly disagree”.

Source: Pontusson et al. (2020^[40]), “Introducing the Inequality and Politics Survey: Preliminary findings”, *Unequal Democracies Working Paper N. 16*, University of Geneva, <https://archive-ouverte.unige.ch/unige:135683>.

In the literature, **reciprocity and trust** are found to be closely linked. When authors are unable to use experimental methodologies, they tend to use self-reported measures of generalised trust as proxies for willingness to reciprocate:

- In the ESS for example, this includes questions on the extent of agreement (on an 11-point Likert-scale) with statements such as “Most people can be trusted”, “Most people would try to take advantage of me”, “Most people would try to be fair” (León, 2012^[92]).
- In **Trustlab**, the Trust games record the amount that players are transferring to other players, as well as the amount sent back by their partners. The amount sent back by partners provides a behavioural measure of reciprocity. A similar assessment of reciprocity can be made experimentally in Trustlab using the amount players put in common during Public Goods games. Moreover, given that participants in the 2020 experiment have information about each other, one can observe whether reciprocity is general or group-specific. With regards to self-reported measures, Trustlab features two different questions in order to measure both positive reciprocity and negative reciprocity (e.g. propensity to punish non-cooperators).

Proportionality or equity tend to be measured in large surveys by asking respondents to choose what society is the fairest, between a society with no income differences (0) and a society with large differences in income (10).

- The survey used in the [Program for Applied Research on Climate Action](#) (PARCA Canada) includes a question that seeks to measure mutual expectations and the perceptual aspect of norms by asking “*People who are close to me generally expect that I do my part to help limit climate change*” with responses on a 5-point scale going from “*strongly agree*” to “*strongly disagree*”.
- The emergence, evolution and dynamics of social norms can also be studied. Young (2015^[93]), for example, uses experimental measures and field data to test the predictions of evolutionary game-theoretic models in this area.

Similarly to the precedent item, preference for equality is easily measured in large surveys with answers bound on a Likert-scale. Pontusson et al. (2020^[40]) measure it by reverse-coding the previous question about the type of society that is considered fairest.

Pontusson et al. (2020^[40]) provide an easily replicable example of metric for need that can be used in large surveys. The authors ask respondents the extent of their agreement, between 1 and 5, with the statement “*A society is fair when it takes care of those who are poor and in need regardless of what they give back to society*”.

Note

1. The questionnaire has been updated for the 2nd wave of the survey conducted in 2023, with results published in (OECD, 2024^[15]). The updated questionnaire was not available at the time this review was conducted. For the purposes of the review, we are referring to the version used in the previous wave of the survey conducted in 2021. Information on the survey design and questionnaire can be found in (Nguyen et al., 2022^[94]).

Annex 1.C. Assessing the data landscape: Preliminary review of the quality and reliability of indicators

Annex Table 1.C1. Overview of possible indicators for the key factors identified in the conceptual framework

Concept	Measurement	Type	Precision	Internal Reliability	External Reliability	Source/Reference	Other
Perceived Magnitude of Inequality	Post-computed ratio of self-reported estimated earnings of low and high SES jobs (e.g. workers & CEOs).	Composite indicator created from self-reported measures	Ratios made from items rated on continuous scales -> Higher levels of sensitivity compared to indicators using only Likert-scales	N/A	Correlation with support for redistribution	International Social Survey Programme (ISSP) (Choi, 2019 ^[95])	
	Estimated ratios between bottom 10% and 50% percentiles, and between 50% and top 90% percentiles of the income distribution			N/A		Inequality & Politics Survey (Pontusson et al., 2020 ^[40])	
Concerns / Tolerance for Inequality	Agreement, measured on a Likert-scale, with the statement <i>"Income differences [in my country] are too high"</i>	Self-reported	Single-item measure -> Potentially high rates of measurement error, low sensitivity and granularity	N/A	Negative association with actual country-level income inequalities	ISSP (Mijs, 2021 ^[66])	
	Agreements, measured on a Likert-scale, with 5 statements on economic inequality, including: <i>"Economic inequality is not a problem"</i> and <i>"I am very disturbed by the amount of economic inequality in the world today"</i>	Self-reported	Measure created from answers to multiple questions rated on Likert-scales -> Higher precision & sensitivity	Internal consistency validated -> unit-weighted linear composite (ICC) = 0.94	Correlation with attitudinal (support for redistribution) and behavioural outcomes (donations) + Correlation with similar indicators (e.g. support for inequality indicators from World Values Survey [WVS] & ISSP)	(Wiwad et al., 2019 ^[96])	

Concept	Measurement	Type	Precision	Internal Reliability	External Reliability	Source/Reference	Other
Justification of Inequality	Choosing amongst multiple factors (e.g. family, hard work etc.) the one that best explains why "the rich are rich" and "the poor are poor"	Self-reported	Low-precision binary measure	N/A	N/A	(Mijs and Hoy, 2022 ^[68])	
	Composite measure of procedural justice, from the ratings between 0 and 100 (or on a 1-to-5 Likert scale) of the importance of multiple factors (meritocratic and structural) in explaining economic success	Composite indicator created from self-reported measures	Composite measure with high granularity and sensitivity	Cronbach's Alpha > 0.6	Correlation with tolerance of current levels of economic inequality, call for governmental action, and support for redistribution	ISSP (Larsen, 2016 ^[97]) (Becker, 2021 ^[98])	
	Perceived Distributive Justice -> Measured through self-centered and other-centered aggregated measures, based on answers to 4 questions on equality of opportunity, rated on 0-to-10 Likert scales.	Self-reported	Composite measures each based on two 11-points Likert scales for higher precision and sensitivity than single-items	Cronbach's Alpha between 0.5 and 0.6 for the two aggregated measures	Correlation with political and institutional trust	European Social Survey (ESS) (Schnaudt, Hahn and Heppner, 2021 ^[99])	
	Subjective probability of intergenerational social mobility -> Individuals are invited to give their subjective probability that individuals in an income quintile will transition to another higher quintile (e.g. in the article, Q1 to Q1, Q1 to Q4, Q1 to Q5)	Self-reported	Single items measured on granular continuous scales, thus with higher sensitivity	N/A	Correlation with support for many conservative and liberal social policies	(Alesina, Stantcheva and Teso, 2018 ^[76])	

Concept	Measurement	Type	Precision	Internal Reliability	External Reliability	Source/Reference	Other
Economic Position	Subjective social status -> Individuals positioning themselves in the social hierarchy on a scale between 1 and 10 with the question "In our society, there are groups which tend to be towards the top and groups which tend to be towards the bottom. Below is a scale that runs from top to bottom. Where would you put yourself now on this scale?". A similar question also exists for respondents to situate their families.	Self-reported	Single-item measure and a low-granularity scale, thus with lower precision and sensitivity	N/A	Correlation with tolerance for inequality & belief in meritocracy	ISSP (Larsen, 2016 ^[97]) (Mijts, 2021 ^[66])	The difference between respondents' subjective social status and the subjective social status of families could be used to create a subjective indicator of social mobility
Financial Security	Rating of financial expectations for one's own situation in the next 12 months, using a 3-point Likert scale (worse, the same, better)	Self-reported	Single-item measure and a low-granularity scale, thus with lower precision and sensitivity	N/A	Non-significant, but positive association with trust in government in (Murtin et al., 2018 ^[13])	(Murtin et al., 2018 ^[13])	
	The Economic Security Index corresponds to the difference between two time periods of the gross household income minus non-discretionary spending like housing, divided / weighted by the household equivalence scale / cost of living. This indicator can be used to identify households experiencing a shock beyond a given threshold (e.g. a 25% drop) or a more general loss of income.	Composite indicator created from self-reported and economic data	Single-item measure, either binary (yes/no), discretised or continuous. It is based on factual economic data.	N/A	Negatively associated with declining mental health as per the GHQ-12 and political trust	Economic Security Index (Hacker et al., 2014 ^[100]) (Kopasker, Montagna and Bender, 2018 ^[101]) (Wroe, 2016 ^[102])	

Concept	Measurement	Type	Precision	Internal Reliability	External Reliability	Source/Reference	Other
Political Identity	Measured using Likert scales, usually between 0 and 10	Self-reported	Single-item discrete measures with rather low sensibility	N/A	Correlated with effectiveness of informational treatments, attitudes towards government, views on inequality and support for numerous policies	(Alesina, Stantcheva and Teso, 2018 ^[76])	
Perceptions of and Attitudes towards Government	Satisfaction with different government services and institutions, rated on 11-point Likert scales	Self-reported	Single-item discrete measures with rather low sensibility	N/A	Correlated for certain services like security and crime prevention, with self-reported generalised social trust and trust in government	(Murtin et al., 2018 ^[13])	
	Self-reported trust in government -> multiple instances of this single-item measure exist: they typically assess trust using a single question, with answers rated on a discrete scale and not necessarily using Likert scaling	Self-reported	Single-item discrete measures with sensitivity ranging from low to very low based on the response range available to respondents	N/A	Evidence that this measure is associated with support for spending in multiple policy domains like defense and welfare	(Rudolph and Evans, 2005 ^[103])	
	Composite political trust -> This indicator is a composite of answers to multiple questions asking respondents to rate multiple institutions on discrete Likert scales. The EVS version uses 4 questions for parliament, the justice system, the armed forces & the police. The ESS uses 5 questions for the parliament, politicians, political parties, the legal system and the police.	Composite indicator created from self-reported measures	Measure created from answers to multiple questions rated on Likert-scales -> Higher precision and sensitivity	ESS version: Cronbach's Alpha > 0.8 EVS version: Cronbach's Alpha ~ 0.7	Association with legal permissiveness and political participation	European Value Survey (EVS) and European Social Survey (ESS) (Hooghe and Marien, 2013 ^[104]) (Marien and Hooghe, 2011 ^[105])	

Concept	Measurement	Type	Precision	Internal Reliability	External Reliability	Source/Reference	Other
Societal Heterogeneity	Racial Segregation through the Multi-Group Theil Index / Fractionalization -> These indicators are derived from census-type data, including the proportion in areas of foreign-born individuals in regions of interest	Measure derived from hard census-type data	Based on continuous percentages and hence granular and sensitive	N/A	Associated with optimistic perceptions of social mobility, decreased social trust, and decreased support for social spending and government intervention for respondents to the centre and right of the political spectrum	(Alesina, Stantcheva and Teso, 2018 ^[76]) (Alesina, Murard and Rapoport, 2021 ^[106]) (Stolle, Soroka and Johnston, 2008 ^[107])	No significant relationship between diversity and support for the welfare state according to alternative method from (Sumino, 2014 ^[108])
Social Trust	Self-reported social trust -> single item question asking respondents how much they trust others, with answers on a Likert-scale, more or less granular. Questions include: <i>"Generally speaking, would you say that most people can be trusted or that you can't be too careful in life"</i>	Self-reported	N/A	N/A	Associated with support for the welfare state, social spending, and trust in government	(Murtin et al., 2018 ^[13]) (Arikan and Ben-Nun Bloom, 2015 ^[109]) (Daniele and Geys, 2015 ^[110])	
	Behavioural trust -> This indicator measures, during trust games, the amount / share of the endowment participants are willing to send their partners in the hopes of a higher payoff	Behavioural measure	Given that the measure is a continuous function of the amount transferred, the measure should be granular, precise and sensitive	N/A	Associated with other-regarding preferences, willingness to cooperate, self-reported trust, institutional and political trust	(Murtin et al., 2018 ^[13])	
	Behavioural In-group Bias -> Whether normalised or not, it essentially captures the difference between the average in-group transfer and the average out-group transfer in a series of economic trust games. The measure can be used to consider intersectional groups (ethnicity + income for instance)	Derived from behavioural measures	Given that the measure is a continuous function of the amount transferred, the measure should be granular, precise and sensitive	N/A		(Cetre et al., 2020 ^[39])	

Concept	Measurement	Type	Precision	Internal Reliability	External Reliability	Source/Reference	Other
Fairness Norms	Preference for equality / Need over equity -> These two self-reported measures are obtained from single-item questions where respondents rate their agreement to statements on Likert scales. The statements are respectively 1°) extent of income differences between individuals, on a scale spanning 0 and 10, and 2°) "A society is fair when it takes care of those who are poor and in need regardless of what they give back to society"	Self-reported measures	These two measures are derived from single item questions. They will thus tend to be less precise and reliable than composite measures. The granularity will depend upon the granularity of the Likert scales.	N/A		Inequality & Politics Survey (Pontusson et al., 2020 ^[40])	
	Behavioural preference for equality over equity -> The behavioural preferences of individuals are determined by comparing the amounts transferred by players to the ones they would transfer if they followed an equality-based, equity-based, or needs-based decision function, during economic games with production phases - typically Dictator Games. It is a function of a participant's performance during the production phase, as well as the performances of his/her partners.	Derived from behavioural measure	The measure can either be a continuous coefficient weighting the individual's own performance in the decision function, or a simple binary indicator indicating the closest pure decision function. Depending upon the design choice, the measure is more or less granular, sensitive and precise.	N/A	N/A	(Balafoutas et al., 2013 ^[111])	

Notes

¹ The OECD's work on inequality has been underpinned by the collection of data and development of internationally comparable indicators through the [OECD Income Distribution Database and Wealth Distribution Database](#). Building on that evidence base, the OECD has provided analysis on key aspects of inequality and recommendations on how to address the challenges they raise. Most notably, it has done so through a series of landmark reports covering (i) the trends in social mobility as well as in inequality in income and wealth (OECD, 2008^[154]; 2011^[155]; 2018^[59]); (ii) the causes of inequality and the policies that can contribute to promote inclusive growth (OECD, 2015^[58]; 2018^[56]); and (iii) the consequences of inequality for society as a whole and for the middle class in OECD countries (OECD, 2019^[156]). Released in 2021, *Does Inequality Matter?* added to this series of OECD flagship publications on inequality (OECD, 2021^[1]). A follow up report to OECD (2018^[59]) is planned for release in 2025, focusing on the level, trends and determinants of inequality of opportunity in OECD countries and on policies to address them.

² In addition to the perceived level of inequality throughout society as a whole, other relevant perceptions notably include people's views on their own position within the income distribution (Cruces, Pérez Truglia and Tetaz, 2013^[47]; Karadja, Möllerström and Seim, 2017^[48]; Hvidberg, Kreiner and Stantcheva, 2023^[49]) and on their prospects for social mobility (Piketty, 1995^[148]; Benabou and Ok, 2001^[112]; Alesina, Stantcheva and Teso, 2018^[76]).

³ Dechezleprêtre et al. (2022^[3]) observes a relative lack of explanatory power of individual socio-economic characteristics in predicting perceptions of and attitudes towards climate policies. See for example p.8: "*It is difficult to predict either beliefs or policy views based on socio-economic and lifestyle characteristics only. Put differently, it is not the case that we are easily able to infer people's policy views or beliefs based on their age, country, gender, education, income, political leanings or how much they rely on polluting sources of energy*". Similarly, p.29: "*Overall, 70% of [policy support is] explained by [key] beliefs and socio-economic and lifestyle characteristics, compared to only 24% explained by individual characteristics alone*". This conclusion is confirmed more broadly by evidence showing that cultural heterogeneity has increased more within groups than between groups (Desmet, Ortuño-Ortín and Wacziarg, 2017^[113]).

⁴ Here again, Dechezleprêtre et al. (2022, p. 25^[3]) reaches a similar conclusion: "*It is difficult to delineate specific groups for or against climate policies.*"

⁵ For key references, see for example Piketty (1995^[148]), Fong (2001^[25]), Alesina and Angeletos (2005^[149]), Alesina and La Ferrara (2005^[114]). See Alesina, Stantcheva and Teso (2018^[76]) for an overview of the economic literature.

⁶ For example, the linear approach to the formation of policy preferences used in *Does Inequality Matter?* leaves important questions open regarding the way in which the different factors interact. This problem becomes more salient as the scope of the analysis expands and a wider range of perceptions and attitudes are considered. Similarly, the fact that the model is largely premised on individual rational choice makes it well adapted for the analysis of "vertical" forms of inequality, such as income disparities, but also means that it is less well equipped to take account of the "horizontal" aspects of inequality and the role of group identity. On the role of group identity and "group threat" in shaping attitudes towards inequality, see for example a recent report by the European Commission (Cassio, 2024^[150]).

⁷ In identifying the key subjective factors for analysing policy preferences, the experts considered 3 main questions: (i) *How do people understand issues relating to inequality?*; (ii) *How do people assess policies*

designed to promote inclusion and equality of opportunities?; and (iii) What expectations do people have of each other in the context of welfare and redistribution?

⁸ For further reference on people's views about inequality and their subjective determinants, see for example Kluegel and Smith (1986^[70]), Janmaat (2013^[7]), Kraus, Rucker and Richeson (2017^[115]), Howarth et al. (2019^[116]), Kraus et al. (2019^[117]), Trump (2020^[118]), Benson et al. (2021^[119]), Easterbrook (2021^[120]), Davidai (2022^[121]).

⁹ For evidence confirming this effect, see OECD (2021, pp. 62-67^[1]). See also Karadja, Möllerström and Seim (2017^[48]) and Mijs (2018^[2], 2021^[66]).

¹⁰ See Ciani, Fréget and Manfredi (2021^[152]) for a meta-analysis of the literature on information treatments in survey experiments on economic inequality. As noted, while information treatments tend to raise awareness and concern about inequality, this does not necessarily translate into increased support for inequality-reducing policies. In this respect, the effects of the information on different types of belief may offset one another or the information may trigger cognitive dissonance reduction mechanisms (motivated reasoning, adaptive preferences...). See for example Kuziemko et al. (2015^[123]), Alesina, Stantcheva and Teso (2018^[76]), Alesina, Miano and Stantcheva (2020^[124]), Hoy and Mager (2021^[125]). For similar evidence on carbon taxation, see for example Douenne and Fabre (2022^[126]).

¹¹ For example, in contrast to Dechezleprêtre et al. (2022^[3]), a similar survey experiment focusing on tax policy finds that informing people about distributional impacts and implied trade-offs between equity and efficiency increases public support for progressive income and estate taxes, but providing information on their efficiency costs has no effect on its own (Stantcheva, 2021^[127]).

¹² The [OECD Framework to Decarbonise the Economy](#) provides an overview of the trade-offs between policy objectives for the main climate policy instruments by characterising them in terms of their cost effectiveness, fiscal implications, distributional impacts and the political economy challenges they are likely to raise (D'Arcangelo et al., 2022^[128]). The OECD has also developed a complementary Framework for Assessing and Addressing Adaptation Needs and Priorities to help guide the design and implementation of climate change adaptation policies (OECD, 2024^[129]). Taken together, these two frameworks aim to support strategies for addressing climate change that are more effective and more likely to receive public support by ensuring greater integration between mitigation policies, adaptation policies and broader economic policy.

¹³ On principles of fairness and how they are applied in the context of resource allocation and distributive justice, see for example Konow (2001^[91]), Pontusson et al. (2020^[40]) and Trump (2020^[118]).

¹⁴ In this case, fairness evaluations would typically be of the following kind: *"How fair is it that a person's income reflect their luck/hard work/talents?"*

¹⁵ In this case, fairness evaluations would typically be of the following kind: *"How fair is it for some individuals to receive more in social benefits than they contribute?"*

¹⁶ See for example Hobbes (1974 [1650]^[151]), Hume (1985 [1740]^[130]), Rawls (1971^[131]) and Nozick (1974^[132]). For commentary highlighting this point in Hobbesian thought, see MacPherson (1964^[133]) and Oakeshott (1975^[134]). For a discussion on how to define and operationalise the notion of social contract in a policy context, see Bussolo et al. (2019^[146]) and OECD et al. (2021^[153]). For qualitative evidence on

citizens' perceptions of the social contract in France and the United Kingdom, see IDDRI / Hot or Cool Institute (2024^[147]).

¹⁷ See for example Lewis (1969^[135]), Gauthier (1986^[136]), Sugden (1986^[32]), Young (2001^[35]) and Kimbrough, Smith and Wilson (2008^[137]).

¹⁸ For an overview of the experimental literature on information search in economics, see Capozza et al. (2021^[138]).

¹⁹ Here, the OECD is supporting efforts to strengthen the integrity of information and implement policies that promote the transparency, accountability and plurality of information sources through its [Reinforcing Democracy Initiative](#). See notably OECD (2022^[139]; 2024^[140]) and the [OECD DIS/MIS Resource Hub](#).

²⁰ Schelling (1960^[141]) offers a classical example by showing how the provision of additional relevant information (on household size, expenditure...) can reduce players' ability to coordinate on a fair income-proportionate share of a joint surplus in an experimental bargaining game. Camerer and Loewenstein (1993^[142]) generalises this point through a study of the relation between information, fairness and efficiency in the context of bargaining. The practical implications of this point are illustrated in Marino, Iacono and Möllerström (2024^[143]) which reviews the literature on misperceptions of inequality and finds that the provision of information is more likely to increase political polarisation than decrease it, as different societal groups respond by strengthening (rather than adapting) their existing preferences.

²¹ On the informational and cognitive limits of human decision-making and how they can be addressed in the context of “bounded rationality” models, see for example (Todd, 2001^[144]).

²² Almås et al. (2017^[145]), Karadja, Möllerström and Seim (2017^[48]) and Hvidberg, Kreiner and Stantcheva (2023^[49]) provide notable illustrations of the insights that can be drawn by linking survey data on perceptions of inequality with administrative data on real-life outcomes.

2. Developing a Public Acceptability Tool: How can the insights from perceptual and behavioural data be harnessed to improve reforms?

Building on the lessons learnt from the specific but paradigmatic case of inequality-reducing policies (Chapter 1), this chapter explores how the insights from perceptual and behavioural data can be harnessed to inform the design and communication of reforms across policy areas. It focuses on the policy tools and frameworks that can help integrate considerations of public acceptability ex-ante into the reform process.

As a main outcome, a proposed Public Acceptability Tool is outlined. It is designed to provide policymakers with a “compass” they can use to better understand the conditions for public acceptability and ensure that reforms are well aligned with people’s key perceptions, attitudes and preferences. The Public Acceptability Tool provides a general framework for identifying and articulating the key dimensions that contribute to public acceptability across reform areas. This general framework is accompanied by complementary tools to help operationalise it in specific reform areas and national contexts.

2.1. Objective and contribution to the OECD's work on the political economy of reform

2.1.1. Making Reform Happen: What has been done

The OECD has a longstanding tradition of work on the political economy of reform across a wide range of policy areas. A core part of the OECD's activity consists in helping countries (i) identify priority areas for reform;¹ and (ii) achieve their objectives through the formulation and design of effective policies. To put its policy advice into action, the OECD seeks to provide countries with a better understanding of the conditions that are necessary for the successful design and implementation of reforms and policies. This implies learning from the experience of other countries, leveraging the OECD's capacity for international comparison and knowledge sharing. It has also led the OECD to pay closer attention to background factors that are specific to each national context (most notably historical, cultural and institutional factors) and the role they play in influencing the outcomes of and responses to policy. As a result, political economy considerations feature prominently in sectoral studies and recommendations across many of the areas covered by the OECD.

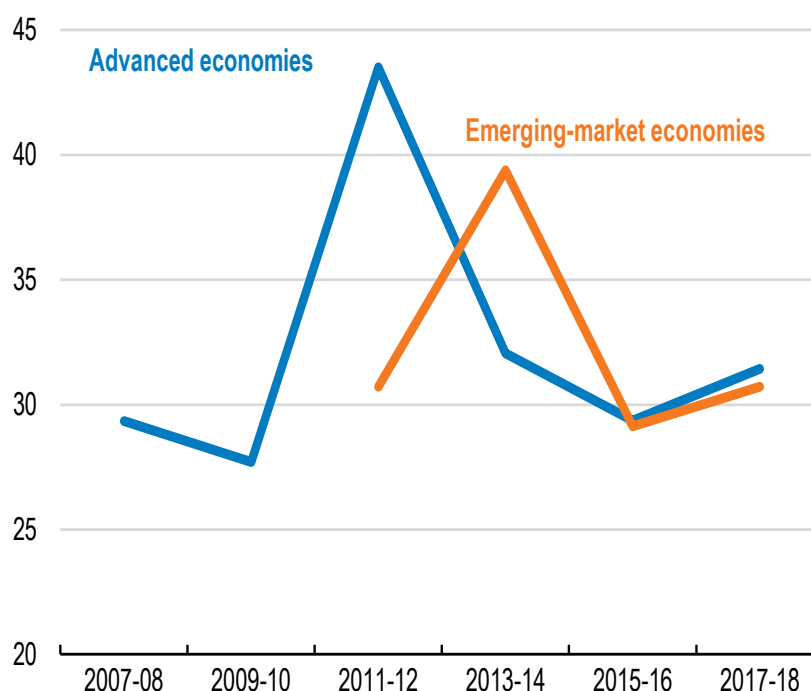
Recent examples include: agricultural policy reform and food system change (OECD, 2021, pp. 81-118^[1]); aid policies and the implementation of development assistance (Hout, 2015^[2]); biodiversity policy reform (OECD, 2017^[3]); environmental policy reform and climate change mitigation (D'Arcangelo et al., 2022^[4]; Dechezleprêtre et al., 2022^[5]; OECD, 2023, pp. 15-50^[6]); inequality and the implementation of policies for inclusive growth (de Mello and Dutz, 2012^[7]; OECD, 2021^[8]); institutional and territorial reforms in the context of multi-level governance (OECD, 2017^[9]); labour market reform in the context of the new *OECD Jobs Strategy* (OECD, 2018, pp. 329-342^[10]); the implementation of automatic adjustment mechanisms in the context of pension reform (OECD, 2021, pp. 83-117^[11]); and political economy challenges for tax policy reform, including in areas where public opposition tends to be high such as inheritance taxation (OECD, 2010, pp. 47-80^[12]; OECD, 2021, pp. 128-131^[13]).

Alongside its sectoral work, the OECD has conducted broader transversal analysis on the political economy of reform. It has sought to identify the economic, social and political determinants of reform implementation through cross-country econometric analysis (Duval and Elmeskov, 2005^[14]; Høj et al., 2006^[15]; OECD, 2019^[16]). Quantitative analysis of reform determinants has been complemented by finer-grained qualitative analysis of the reform process, which has helped bring a number of crucial elements into the picture including the role played by political actors, institutional settings and contextual variables.² This has been done through case studies of successful and failed experiences of structural reform in different policy areas, most notably in the context of the 2007-2010 *Making Reform Happen* exercise (Tompson, 2009^[17]; OECD, 2010^[18]).

Through its *Making Reform Happen* exercise, the OECD has identified public acceptability as a key condition for the successful implementation of reforms. *Making Reform Happen* provided a series of general and sector-specific lessons on the successful conduct of reform, based on the quantitative and qualitative analysis of actual reform episodes in member-countries over several decades. The importance of public acceptability is reflected (i) in the general conclusion that the case for reform must be built on a broad consensus among the public, rather than simply on technical grounds; and (ii) through evidence that a "reform by stealth" approach is less likely to be successful in the long-term (Tompson, 2009, p. 49^[17]; OECD, 2010, pp. 16-17^[18]). In the decade following *Making Reform Happen*, the issue of public acceptability has been increasingly taken up in OECD work (OECD, 2017^[3]; Dechezleprêtre et al., 2022^[5]; OECD, 2023^[6]). Its relevance has also grown as the challenges associated with the climate, demographic and digital transitions, as well as rising public debt in the aftermath of successive crises, require ambitious reforms in difficult areas including tax, spending, pensions, labour markets and education (OECD, 2024^[19]). In parallel and adding urgency to the issue, reform activity in the decade following *Making Reform Happen* has slowed significantly following a brief post-crisis surge (see Figure 2.1).

Figure 2.1. The pace of structural reform has fallen from its post-2009 crisis peak

Responsiveness to OECD Going for Growth reform recommendations across countries



Note: Reform activity is measured using the responsiveness rate indicator (RRI) that captures the extent to which *Going for Growth* policy recommendations are taken up. “Advanced economies” comprise all OECD member-countries excluding Chile, Colombia, Costa Rica, Mexico and Turkey. “Emerging-market economies” include these 5 OECD countries as well as Argentina, Brazil, China, Indonesia, India, Russia and South Africa. The chart shows a simple average of the RRI across countries for both groups.

Source: OECD (2019_[20]), *Economic Policy Reforms 2019: Going for Growth*, OECD Publishing, Paris, <https://doi.org/10.1787/aec5b059-en>.

Several of the recommendations from *Making Reform Happen* focus on public acceptability and on the conditions through which governments can build broad support for necessary reforms.³ These recommendations notably include:

- Having a clear electoral mandate for reform;
- Communicating effectively to demonstrate the need for change;
- Establishing a strong evidence base to support the case for reform;
- Understanding the real and perceived conditions of the policy regime to be reformed;
- Engaging with the groups threatened by the proposed reform through consultative processes;
- Considering appropriate compensatory measures at the design stage to address the social and distributional impacts of reform.

This report seeks to reassess and deepen these recommendations by taking account of the new opportunities for measuring subjective factors (including public perceptions, attitudes and policy preferences) created by recent methodological advances (see Box 1.1 in the previous chapter). In this respect, it adds a third experimental and behavioural element to the quantitative and qualitative approach developed in *Making Reform Happen*. This added element can shed valuable light on the “demand for reform” and help better understand the conditions for public acceptability. The aim in doing so is to take better account of people’s underlying views, attitudes and understanding of issues when designing reforms – in other words, to better align the “supply-side” and “demand-side” of reform.

Deeper analysis of “demand-side” factors is also crucial for understanding how the political economy of reform has evolved and what this implies for public acceptability. The political economy of reform has changed in significant ways in the decade and a half since *Making Reform Happen*. In particular, a succession of socio-economic shocks, including the Global Financial Crisis and the COVID-19 pandemic, have had an impact on people’s expectations and demands (OECD, 2010, pp. 30-32^[18]; OECD, 2021^[8]). Over the same period, structural transformations, including the advent of social media and more fragmented political landscapes, have contributed to reshape modes of political action, communication and relations between citizens and policymakers (OECD, 2020^[21]; OECD, 2021^[22]). In this context, it is important to understand how these changes have affected the conditions for public acceptability.⁴ This research agenda is not limited to the OECD. Governments increasingly recognise the role that perceptual and behavioural data can play in informing policy and have strengthened their capacity to collect these data (see Box 2.1). Furthermore, other international organisations, including the IMF and the World Bank, have put similar emphasis on public acceptability and its determinants and are making increasing use of perceptual and behavioural data in order to better understand them (see Box 2.2).

Box 2.1. Making public views part of the process of change: The example of the Australian Public Service Reform Agenda

The Australian government is using perceptual data to promote a people-centred public service

The Australian Public Sector (APS) reform agenda seeks to strengthen the integrity of the public service, as measured by the [OECD Public Integrity Indicators](#), and contribute to deliver more effective, fair and inclusive outcomes. To support this agenda, the [Australian Public Service Commission](#) (APSC) – a specialised policy agency within the portfolio of the Department of Prime Minister and Cabinet – conducts two regular national surveys to evaluate its effectiveness and ensure the APS “*places people and businesses at the centre of policy and services*”:

- The [Trust and Satisfaction in Australian Democracy](#) survey
- The [Survey of Trust and Satisfaction in Australian Public Services](#)

The surveys cover a range of issues that are highly relevant for understanding public views of and responses to the APS reform agenda. This includes levels of trust and satisfaction in democracy; public satisfaction (and dissatisfaction) with public services, including social welfare, public health and taxation services; social capital; trust in information; and how well-being and life events affect trust in institutions. The results of both these surveys are shared with the public through reports.

Perceptual data can help manage change, ensure greater transparency and build public support

The primary use of these data consists in “managing change” within the APS by integrating public views into the existing reform process, rather than in “making the case for reform” directly to the public. However, the collection, use and reporting of these data can help build support for the reform agenda by ensuring greater transparency, demonstrating that community experience and feedback are taken into account and identifying challenges and gaps in trust that policymakers and civil servants can respond to. For example, results from the surveys show higher than average gender gaps in terms of trust in government and in public institutions compared to OECD countries, with a lower proportion of women expressing high or moderately high levels of trust than men (OECD, 2024^[23]).

Other tools are designed to support the implementation of change. For example, the *APS Agency Engagement Maturity Assessment Tool* helps agencies and departments identify engagement capability gaps and foster a culture of continuous improvement within the public service. The collection and use of data on lived experience is also promoted to inform policies and programmes.

By shedding new light on the “demand-side” of reform, the work of the OECD Expert Group on New Measures of the Public Acceptability of Reforms helps complement and update the analysis conducted in *Making Reform Happen*. While different in nature, the contributions made by the Expert Group to the OECD’s work on inequality and on the political economy of reform are connected. The activities of the Expert Group focus on understanding the subjective determinants of public acceptability from a multidisciplinary and policy-oriented perspective. In doing so, the Expert Group has proceeded in two stages and sought to draw specific implications for two distinct strands of OECD work: (i) on inequalities; and (ii) on the political economy of reform. As detailed in Chapter 1, the Expert Group’s contribution to the OECD’s work on inequalities has consisted in establishing a conceptual framework that can underpin the research programme and data collection efforts outlined in (OECD, 2021^[8]) and carried forward by the OECD Observatory on Social Mobility and Equal Opportunity (see Annex 1.A). The aim of this conceptual framework is to help identify and analyse the role that subjective factors play in shaping the public acceptability of inequality-reducing policies. As such, lessons relating to the analysis and measurement of key subjective factors in the area of inequality also provide the basis for a broader reflection on public acceptability that can complement and help advance the OECD’s work on the political economy of reform.

The main outcome of this work has consisted in developing new policy and measurement tools for assessing the public acceptability of reforms along the key dimensions that matter to people. The second stage of the Expert Group’s activities was practical in nature. A “Public Acceptability Tool” was designed to support policymakers’ efforts to integrate considerations of public acceptability ex-ante into the design and communication of reforms. In order to do so, the proposed Public Acceptability Tool seeks to better harness relevant insights on public acceptability from the available perceptual and behavioural data, building on the lessons drawn from the study of inequality. The rationale for developing a Public Acceptability Tool and its expected role are presented in Section 2.1.2.

Box 2.2. A common challenge and shared research agenda – Analysis of the public acceptability of reforms and its drivers by the IMF and the World Bank

The issue of public acceptability features increasingly in the analysis and advice on reform provided by the IMF and World Bank.

As with the OECD, this growing focus has led both international organisations to explore (i) the role played by perceptions, attitudes and policy preferences; and (ii) the lessons that can be drawn from perceptual and behavioural data about the determinants of public acceptability, in a country-specific and a comparative cross-country perspective.

Analysis of patterns and trends in reform activity across countries and policy areas confirms that public acceptability constitutes a significant barrier to reform. For example, (Alesina et al., 2023^[24]) draws on two extensive IMF datasets to study the macroeconomic and electoral effects of a wide range of reforms. These datasets cover respectively (i) reforms in domestic finance, external finance, trade, product and labour markets for 90 advanced and developing economies over the period 1973-2014 (*Structural Reform Database*); and (ii) information on the results and timing of elections for a subset of 66 democracies among the countries included in the reform dataset over the same period (*Electoral Dataset*).

Results from this study suggest that the electoral effects of reform are real and depend on the timing of reform in relation to both the electoral cycle and the business cycle. In this respect, governments that implement reforms towards the end of an electoral term (i.e. with insufficient time to deliver visible results) or in periods of economic contraction tend to be penalised at the ballot box. Voters do not seem to fully integrate the delay that is needed for the economic effects of reform to materialise and are more

likely to associate reforms with current economic conditions at the time of their implementation. The implications of this finding are particularly challenging given that (i) growth-enhancing liberalising reforms often take time to deliver economic benefits; (ii) a majority of reforms tend to be implemented during recessions, confirming the “reform under crisis” hypothesis; and (iii) tighter monetary policy and the need for fiscal consolidation may further reduce governments’ margins for building public support and therefore their capacity to carry out necessary reforms (Duval, Furceri and Miethe, 2018^[25]).

Both the IMF and the World Bank are using randomised survey experiments to assess public acceptability and analyse its drivers across a range of policy areas.

Climate policies

Dabla-Norris et al. (2023^[26]) conducted an online survey covering 30 000 respondents across 28 advanced and emerging economies to analyse the individual characteristics and beliefs associated with climate risk perceptions and preferences for three major types of climate policies: carbon-pricing; regulation; and subsidies for low-carbon technology and renewable energies. Results show that beliefs regarding the effectiveness of policies in reducing emissions, their distributional impact and their associated “co-benefits” in terms of improved air quality, health outcomes and job creation play an important role in translating concerns about climate change into actual support for policies to address it. Providing salient information about the effectiveness and “co-benefits” of climate policies also contributes to strengthen public support. In the case of carbon-pricing, the study confirms that using the revenue raised to address distributional concerns or subsidise green infrastructure and low-carbon technologies increases public acceptability.

Hoy et al. (2023^[27]) provides evidence on the drivers of public support for energy subsidy reform – another important lever in the transition to a net-zero economy – using a large-scale experimental survey covering 37 000 respondents across 12 middle-income countries where fossil fuel subsidies are both large and regressive. The study highlights (i) limited public knowledge about energy subsidies, with just over 50% of respondents aware that these subsidies exist in their country; (ii) the scope for strengthening public support for reform through the provision of information (particularly on the negative environmental impacts of fossil fuel subsidies); and (iii) the extent to which support for energy subsidy reform is conditional on accompanying measures that redirect revenue towards investment in priority areas, such as education, health and infrastructure. Interestingly, the study also suggests that public support is not driven primarily by individual self-interest or endowments: respondents who stand to lose the most from energy subsidy reform (i.e. high-income individuals, car owners...) are just as likely to increase their support for reform when presented with information than those with little to lose.

Labour regulation

Duval et al. (2024^[28]) uses an online survey covering 7 000 respondents across 14 countries to explore the relative importance of individual characteristics (gender, age...) and endowments (income, education, labour market status...) compared to beliefs (political views, trust in government, level of information...) in explaining people’s preferences for stricter/ looser employment protection legislation (EPL). This question has practical implications for the design of EPL reforms as the effectiveness of different levers will depend on what drives public acceptability in this area (i.e. compensatory measures may help build public support if endowments are the key driver, while behaviourally-informed communication campaigns may be more effective if beliefs are the key driver).

The analysis shows that an individual’s beliefs contribute 2 to 3 times more to their views on EPL reform than their own endowments and personal payoffs. As a result, individuals who would stand to gain from looser EPL (i.e. labour market outsiders) are just as likely to support strict EPL as others and are also more likely to state that they do so on the basis of societal concerns (e.g. that deregulation will not create jobs and will increase inequality) rather than individual concerns (e.g. that deregulation might

hurt them personally). Furthermore, among respondents who support strict EPL, only around one-third of them would change their opinion if adequate monetary compensation were provided to address their specific concerns (either individual or societal) about deregulation. While beliefs seem to play a key role, the survey experiment also shows (i) that people have a limited understanding of EPL; and (ii) that beliefs about EPL reform can change when information is provided about how labour regulation works in practice. Insights from this study were notably used in the 2024 Article IV consultation with Spain to support IMF advice on EPL reform.

Tax policy

Hoy (2022^[29]) analyses the impact that information about the progressivity of the tax and transfer system has on people's willingness to pay taxes, based on a randomised survey experiment covering 30 000 respondents across 8 developing countries. Results confirm that tax compliance is influenced by the perceived progressivity of the tax system and not just by individual incentives. They also show that providing information about the impact of taxes and transfers on income inequality can increase people's willingness to pay taxes, with this effect largely driven by respondents who have a stated preference for redistribution and see their prior expectations regarding the progressivity of the tax and transfer system in their country confirmed or exceeded in practice. These results have several practical implications for tax policy. First of all, reforms which aim to strengthen a country's fiscal position through greater equity in the tax and transfer system may potentially also deliver an added benefit by increasing people's willingness to pay taxes (and vice-versa for reforms that reduce progressivity). Secondly, there may be scope to increase tax compliance through information campaigns focusing on the progressivity of the tax system and how tax revenue is used to fund government transfers that support a range of households and notably the most vulnerable.

2.1.2 Developing a Public Acceptability Tool: What for?

The Public Acceptability Tool responds to policymakers' need for better guidance on the conditions that contribute to building broad support for necessary reforms. The aim in doing so is to improve the design and communication of reforms by providing (i) an ex-ante assessment of how well the case for reform aligns or not with citizens' understanding of the issue; and (ii) an opportunity to incorporate their views and demands into the reform process. This guidance is based on the growing capacity to identify, measure and analyse the perceptions, attitudes and preferences that shape public views on policy and constitute the "demand-side" of reform. It will enhance the advice provided to policymakers by drawing on existing efforts to collect relevant perceptual and behavioural data and by putting this body of evidence into action to develop more effective strategies for reform – i.e. strategies that take better account of the conditions for public acceptability throughout the reform process and better reflect citizens' expectations and demands.

The role of the Public Acceptability Tool is to act as a "compass" that can help policymakers design reforms with public acceptability in mind and strengthen the case for reform by ensuring it is well aligned with public views. As a compass, the tool will contribute to organise the relevant perceptual and behavioural data, harness the key insights on public acceptability from these data and integrate them more systematically into the reform process. As such, the tool does not seek to provide a "recipe" or template for a successful reform. Its role consists in supporting policymakers' decisions throughout the reform process by helping them keep track of the main determinants of public acceptability and apply the insights gathered from perceptual and behavioural data in a more systematic and effective manner.

The development of a Public Acceptability Tool presents several expected benefits for policymakers. These benefits include:

- Improving policy recommendations by taking better account of the public perceptions, attitudes and preferences that determine citizens' views on the relevant issues and shape their responses to proposed reforms;
- Selecting between different options for reform (first-best, second-best...) by assessing their "feasibility" in terms of how well aligned they are with the "demand side" of reform and what this implies for the prospects for building sufficient public support; and
- Designing reforms that are acceptable to the public and communicating the case for reform more effectively, notably by identifying mismatches between proposed reforms and citizens' underlying views and beliefs on the relevant policy issues.

In doing so, the Public Acceptability Tool aims to complement and enhance existing OECD policy advice, including its sectoral and general recommendations on the design and implementation of reforms as well as its recommendations on public communication around reform. It also seeks to align with OECD statistical standards, including possible future guidelines on the measurement of subjective factors.

As a policy compass, the Public Acceptability Tool has two main functions. These functions have implications for how and at what stage the tool should be used.

A distinction can be made on this basis between:

- *A listening function*, through which the tool can be used to harness insights from perceptual and behavioural data in order to better understand "*what kind of reform is likely to be acceptable to the public*". This "strategic" use of the tool can support policymakers at the design stage of reform.
- *A translation function*, through which the tool can help harness the data to shed light on "*how a proposed reform can be presented more effectively*". This "tactical" use of the tool is mainly relevant for the communication and implementation stages of reform.

The Expert Group underlined the fact that the Public Acceptability Tool's main value will derive from its capacity to inform the design and content of reforms in a way that better reflects public demands and can contribute to build broader support. As such, primary focus should be put on the tool's listening function.

The Public Acceptability Tool is designed to provide a general framework that can be applied across different reform areas. Further details on the implications of this approach, as well as possible alternative approaches for assessing the public acceptability of reforms, can be found in Box 2.3. The structure and content of the proposed Public Acceptability Tool are discussed in Section 2.2, while Section 2.3 outlines other complementary tools that can help operationalise the Public Acceptability Tool for specific reform areas, national contexts and histories.

Box 2.3. Conceptual approaches for assessing the public acceptability of reforms

A two-stage approach was followed in developing the Public Acceptability Tool

This involved:

1. Establishing a general framework for assessing the public acceptability of reforms through identification of the key dimensions that matter across reform areas and contexts; and
2. Adapting this general framework to specific areas and contexts to ensure that it is relevant and operational for assessing concrete reform proposals.

This approach has several advantages. First, developing a general framework extends the tool's scope for application as it can be used to address issues of public acceptability and support reform strategies across a wide range of policy areas. This also opens up the possibility for comparative analysis on public acceptability and how its drivers may differ across reform areas and countries, as well as for drawing further general lessons on public acceptability that can complement the analysis conducted in *Making Reform Happen*. Secondly, the comprehensive nature of the framework may increase its strategic value for policymakers and the relevance of the insights it can provide. In this respect, a general framework is more likely to capture the different dimensions that matter for public acceptability and can help account for the ways in which they interact in specific policy areas, national contexts and reform episodes. In doing so, it also covers the different elements that policymakers may rely on to build their case for reform and can help them determine how this case should be adjusted along different dimensions in response to public views.

Potential limits to this approach also need to be considered. The effectiveness of the tool depends first of all on the degree to which it is able to map and cover the key dimensions of public acceptability. Secondly, these dimensions are set at a general level and the tool must be tailored for specific policy areas and country contexts in order to be applied. Tailoring the general framework for specific applied cases notably implies that proper account be taken of differences between policy areas in terms of (i) the relative importance of the key dimensions of public acceptability; and (ii) the determinants of successful reform implementation. It also implies that focus be put on understanding differences in public perceptions, attitudes and policy preferences across reform areas, national contexts and groups, to the extent allowed by the available perceptual and behavioural data.

Other approaches are possible to help assess the public acceptability of reforms.

Alternative approaches identified in the literature include:

- A “sectoral” approach which seeks to identify a single key dimension of public acceptability for specific types of reform. An interesting illustration of this type of approach can be found in Bierbrauer, Boyer and Peichl (2021^[30]) for a significant and widespread type of tax reform designed to make personal income tax systems more linear (i.e. the changes introduced are a “monotonic” function of income, making the income tax system more progressive or more regressive). Here, economic impact and changes in the individual tax burden are taken as the key determinant of public acceptability. Under these conditions, economic voting is likely to predominate and public acceptability can be assessed using a “median voter” model: reforms will be politically feasible if a majority of individuals benefit financially from the measure introduced. Sectoral approaches of this kind have defined areas of application and may give rise to more precise policy recommendations. Conversely, they are narrower in scope and may leave out of the picture dimensions of public acceptability that become relevant in given reform episodes or particular levers that policymakers may use to build their strategy for reform.

- An “inductive” approach that does not define public acceptability a priori but starts instead from the analysis of public attitudes and preferences to determine a reform strategy. This approach tends to rely on the use of survey experiments and focus groups to explore targeted questions regarding the grounds on which people support or oppose reform and provide tailored guidance on that basis. Duval et al. (2024^[28]) offers an example relating to employment protection legislation (see Box 2.2). Inductive approaches of this kind can provide valuable insights and feedback on specific reform proposals by guiding and improving on more traditional survey work.

Conversely, because these approaches are more limited in scope and do not seek to define public acceptability either at a general or sectoral level, the insights that can be drawn from them are also likely to be more limited and less strategic insofar as they do not connect the different dimensions of public acceptability and may leave some of them out of the analysis. In this respect, inductive approaches may be best thought of as complements to the two previous approaches rather than as substitutes.

2.2. The Public Acceptability Tool (PAT)

2.2.1. The Structure of the PAT

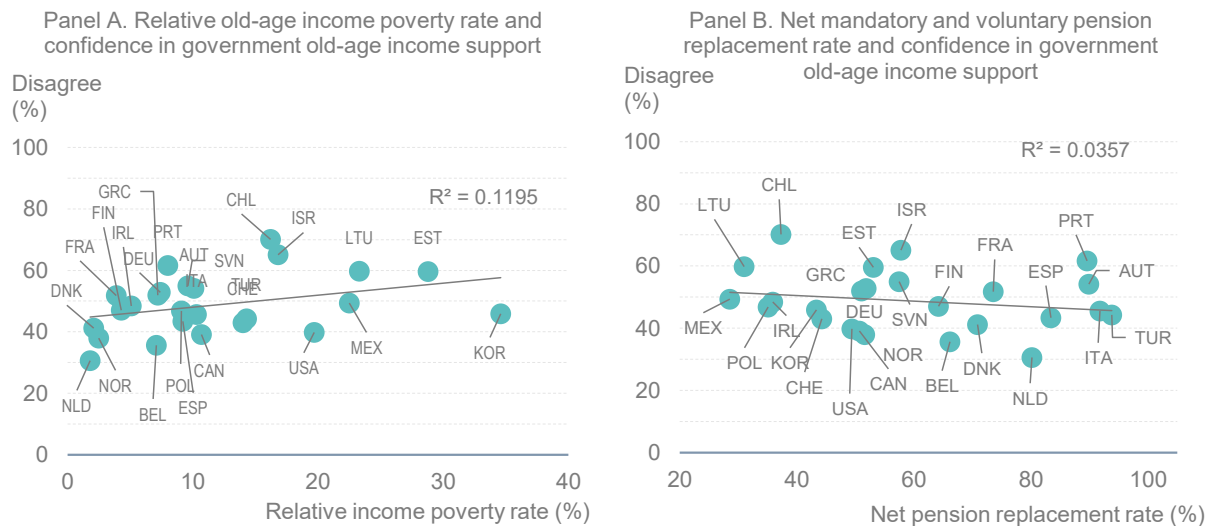
The proposed Public Acceptability Tool (henceforth PAT) aims to identify and organise the different dimensions through which citizens assess reforms. The multidimensional nature of the PAT is a corollary of its role as a general framework for assessing public acceptability. The scope of the PAT implies that it be able to identify and cover a set of key dimensions which determine public support across reform areas.⁵ It also implies that the PAT be able to support a broader analysis of the ways in which these different dimensions interact. Analysis of these interactions is essential given that the relative importance of the different dimensions will vary between reform areas and may be influenced by contextual factors that are specific to countries and to particular reform episodes. These contextual factors include for example communication by government and by opponents of reform and their effectiveness in “activating” different dimensions of public acceptability in public and policy debates. Section 2.2.1 identifies the key dimensions of public acceptability that compose the PAT and provides a general structure for organising the insights drawn from these different dimensions.

First, economic and distributional impacts constitute key dimensions through which citizens assess the outcomes of reform. Economic and distributional impacts are of central importance in the literature on the political economy of reform, where a core challenge consists in ensuring (i) that reforms are effective and contribute to increase the aggregate welfare of society; and (ii) that they are perceived as fair in terms of how the costs and benefits of reform are shared across groups, taking account of their relative political weight.⁶ For policymakers, an essential first step towards building a strong case for reform must consist in seeking to understand these impacts and to clearly articulate equity and efficiency considerations. This conclusion is reflected in the general guidance on the political economy of reform provided in *Making Reform Happen* (OECD, 2010, pp. 12-19^[18])⁷ and supported by empirical analysis of the trade-offs between equity and efficiency implied by structural reforms (Causa, de Serres and Ruiz, 2015^[31]; Ostry, Berg and Kothari, 2018^[32]). It is also confirmed by recent experimental evidence on the important role played by perceived efficiency and equity as determinants of public support for policies, notably in areas relating to climate change (Maestre-Andrés, Drews and Van Den Bergh, 2019^[33]; Dechezleprêtre et al., 2022^[5]; Hoy et al., 2023^[27]) and taxation (Stantcheva, 2021^[34]). As a result, the PAT should include *Economic* and *Fairness* dimensions and seek to connect these dimensions as key elements through which citizens assess the outcomes of reforms.

Secondly, the PAT also needs to take account of behavioural barriers that may undermine the case for reform and limit public support. The Expert Group drew attention to the fact that the behavioural aspects and implications of reform play an important role in determining public acceptability across a wide range of reform areas. This issue is well studied in the literature on the public acceptability of health interventions, where promoting behavioural change is the main objective and identifying and addressing the barriers that may prevent it constitutes a key challenge (Diepeveen et al., 2013^[35]; Reynolds et al., 2019^[36]). Its importance has also been highlighted in the area of climate change and environmental policy (OECD, 2025^[37]). Furthermore, the Expert Group provided examples suggesting that failure to take account of these behavioural dimensions may prevent the passage of reform even in situations where the case for reform is strong on both equity and efficiency grounds and levels of public support are high. When designing a general framework, as is the case with the PAT, a broad approach is needed as the range of behaviours and potential barriers to be considered will be more diverse and often specific to particular reform areas and national contexts.

On this basis, the PAT includes a focus on the *Behavioural Dimensions of Social Change*. Reforms imply a broader process of social change in that they require individuals to adjust their behaviour to achieve a desired aggregate outcome. Taking account of the informational, cognitive and behavioural aspects of this process can provide a more realistic picture of the “demands” that reforms make on individuals, as well as of their capacity and willingness to make the behavioural changes demanded of them.⁸ Doing so can help bring to light important additional considerations that may influence people’s perceptions of and responses to reforms, beyond their immediate economic and distributional impacts. By paying attention to these dimensions, the PAT can help policymakers better understand how individuals should be accompanied through the broader process of social change implied by reform and how to foster greater public acceptability by addressing the behavioural barriers that may emerge in this context. For example, informational and cognitive barriers tend to be particularly significant in areas where the underlying issues are complex and levels of “literacy” are low, such as tax reform and pension reform. Figure 2.2 provides an example illustrating how limited knowledge and perception gaps may prevent the case for pension reform from being made effectively on economic and fairness grounds. Section 2.2.2 outlines some of the main behavioural dimensions of social change that may apply across reform areas and should therefore be covered by the PAT.

Figure 2.2. Across OECD countries, perceived measures of pension adequacy are poorly correlated with objective measures such as impact on poverty and net replacement rate

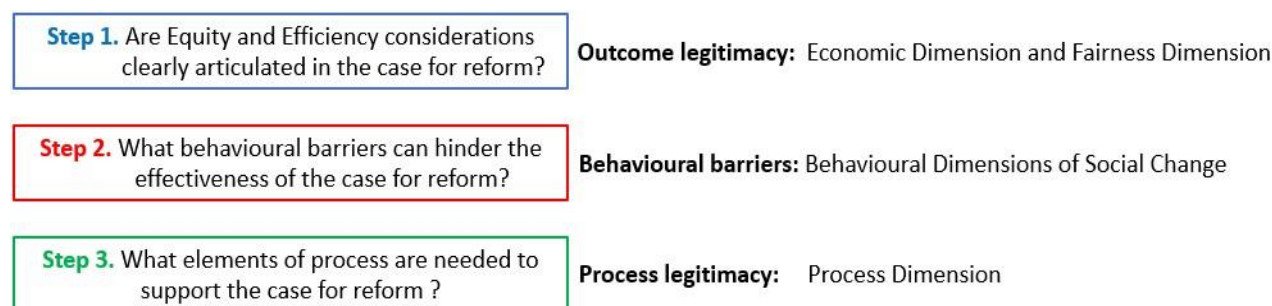


Note: Respondents were asked about their degree of agreement with the statement “I think that the government would (or does) provide my family and me with adequate income support in the case of income loss due to old-age”. Response options were “agree”, “strongly agree”, “disagree”, “strongly disagree” and “undecided”. Data on the relative income poverty rate for 66- to 75-year-olds are based on equivalised household disposable income, i.e. income after taxes and transfers adjusted for household size. The poverty threshold is set at 50% of median disposable income in each country. Data refer to 2018 or 2017, except for Mexico and the Netherlands (2016). Data on the future net pension replacement rate are based on entitlements for a man on average earnings and refer to voluntary and mandatory pensions. Data refer to 2018. Source: OECD (2021^[38]), *Main Findings from the 2020 Risks that Matter Survey*, OECD Publishing, Paris, <https://doi.org/10.1787/b9e85cf5-en>.

Finally, the PAT includes a **Process Dimension** to capture the sense of legitimacy that a given reform can draw, or not, from the institutional and political processes used to design, implement and justify it. Institutional and political factors linked to the reform process also play an essential role in shaping policy options, public support and ultimately the outcomes of reform across different areas. This conclusion is well-established in the literature on the political economy of reform (Williamson, 1994^[39]; Drazen, 2000^[40]; Persson and Tabellini, 2000^[41]) and is supported by empirical evidence.⁹ In addition to the expected outcomes of reform and the necessary conditions for enabling the implied behavioural change, the PAT therefore needs to cover the distinct role that procedural elements play as determinants of public acceptability. An additional question to consider is how the legitimacy drawn from these procedural elements (covered under the *Process* dimension) relates to the legitimacy drawn from the outcomes of reform (covered under the *Economic* and *Fairness* dimensions). In this respect, the Expert Group noted that procedural elements are likely to be particularly important in contexts where policymakers are not able to articulate the equity and efficiency dimensions of reform in a clear and convincing manner or build sufficient public support on these grounds.

Based on these guiding principles, Figure 2.3 offers a visual representation of the possible structure around which the PAT can be designed as a general framework for assessing the public acceptability of reforms. In doing so, it identifies the key dimensions that contribute to public acceptability across reform areas and organises these dimensions in a way that is relevant to policymakers and can support their decisions throughout the reform process.

Figure 2.3. The structure and key dimensions of the PAT



2.2.2. The Content of the PAT

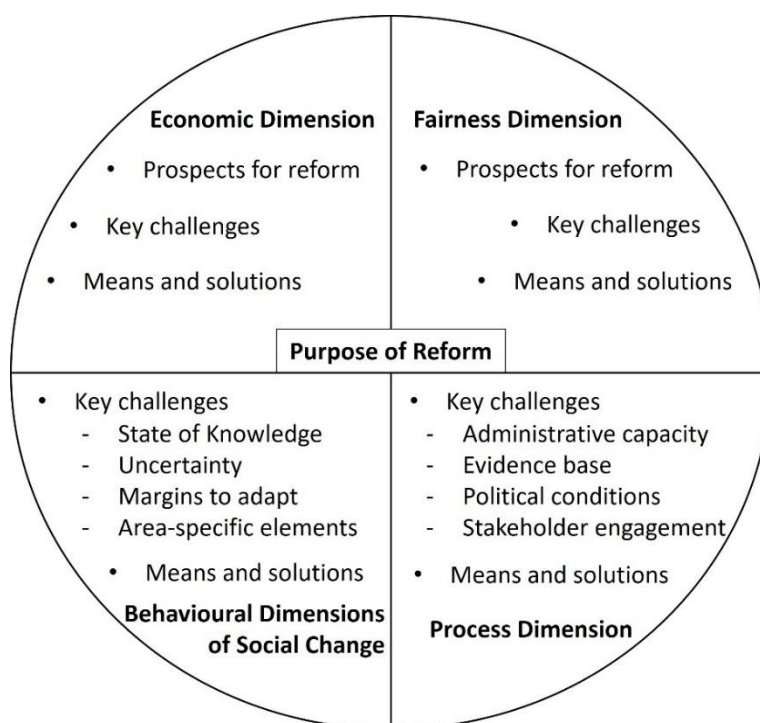
As discussed in the previous section, the PAT covers 4 dimensions that have been identified as relevant for understanding public acceptability across reform areas based both on a study of the political economy literature and on the inputs of the Expert Group. These 4 dimensions are:

- The economic impacts of reform and how they are assessed;
- Fairness considerations relating to the distributional impacts of reform;
- The informational, cognitive and behavioural dimensions of social change; and
- Procedural features relating to the way in which a reform is designed, implemented and adapted over time.

This section describes the main sub-components that could be included under each dimension, as well as possible perceptual and behavioural data that may be used to assess them (see the boxes at the end of each sub-section). By organising the relevant data and harnessing their insights, the PAT presents an ex-ante overview of how well a proposed reform aligns with public perceptions, attitudes and preferences along the key dimensions that shape citizens' views of and responses to reform. This overview can help policymakers identify areas of relative "strength" on which to build the case for reform (i.e. dimensions where the reform is well aligned with public views), as well as areas of relative "weakness (i.e. dimensions where the proposed reform may be out of line with public views and more easily contested). It would also help identify key perceptions and attitudes that need either to be shifted to secure public support or taken as "hard" constraints that should guide the design of reform. The insights provided thereby could be used to (i) inform the design of proposed reforms (*listening function* of the PAT); and (ii) develop more tailored communication strategies and engagement efforts (*translation function* of the PAT).

A visual representation of the content of the PAT can be found below (see Figure 2.4). It includes the different dimensions of the PAT and their sub-components. Focus has been put on harnessing policy-relevant insights on the key political economy challenges associated with each dimension, as well as possible means and solutions for addressing these challenges. The *Economic* and *Fairness* dimensions share a common sub-component labelled "*Purpose of Reform*" which affects the assessment of both the economic and the distributional impacts of reform.

Figure 2.4. A framework for assessing the public acceptability of reforms – The main dimensions of the PAT and their sub-components



Economic and Fairness Dimensions

The *Economic Dimension* covers the expected economic impact of a proposed reform and how it is perceived by the public.¹⁰ The *Fairness Dimension* covers the expected distributional impact of a proposed reform and citizens' views on its overall fairness, including broader evaluations on deservingness and burden-sharing across groups.

Sub-component #1: Prospects for Reform

Assessing the *prospects for reform* implies looking at the perceived *need for reform* (based on citizens' evaluation of the status quo)¹¹ and at the public's *understanding of the impacts of reform* in terms of both equity and efficiency (i.e. citizens' evaluation of the outcome of reform). Objective and subjective data are used under this sub-component to provide insights on how well the need for reform is understood, to what extent the reform is likely to be supported or opposed and on what grounds.

These insights can help policymakers:

- **Better understand how people think of the efficiency and equity aspects of reform in a particular policy area.** In this respect, building public support is likely to be more difficult in contexts where (i) the status quo is well established; and (ii) the impacts of reform are not well understood. This assessment would provide policymakers with a preliminary overview of how the public sees the case for reform. Insights can be drawn from there on the extent to which a proposed reform is aligned with public perceptions (i.e. the general prospects for reform in a particular area), on the relative areas of strength and weakness in the case for reform and on the grounds on which this case should be built to ensure it is acceptable, notably when articulating the economic and fairness dimensions of this case. Figure 2.5 provides an illustration using a simple binary indicator that signals whether the economic need for and impacts of reform are clearly understood or not.

- **Identify possible perception gaps that can be acted on to strengthen the case for reform.** Comparison between (i) the perceived and actual performance of existing policy settings; and (ii) the perceived and projected impacts of reform, along both economic and fairness dimensions, can help highlight areas where public perceptions are misaligned with actual or projected outcomes. Information campaigns targeting these perception gaps may be considered as a possible way to strengthen the case for reform by changing the public's evaluation of the status quo and/or of the impacts of reform. Behavioural and procedural elements can provide further insight on the conditions under which information campaigns are likely to be effective or not and should also be taken into account (see below). In addition to gaps in public perceptions, possible insights could also be drawn from the comparison between citizens' views on the need for reform and those of experts and policymakers. Understanding to what extent these views align or not and how they differ can help select policy priorities and determine what type of information to provide.¹²
- **Help operationalise the notion of “ripeness for reform”.** The notion of “ripeness for reform” captures the perceived state of the policy setting to be reformed and to what extent it is viewed as well-functioning or not (Ross, 2007^[42]). Its importance as a determinant of successful reform implementation was notably highlighted by *Making Reform Happen*, where it was measured using a simple indicator reflecting the presence or absence of previous reform attempts in a given policy area (Tompson, 2009^[17]). Subjective measures of perceptions and attitudes towards the status quo can yield additional insight on the extent to which an existing policy setting is “ripe” for reform. Similarly, comparison with the actual state of this policy setting may provide a lever to act on by helping identify a relevant perception gap.

Figure 2.5. Assessing the prospects for reform

	Economic dimension	Fairness dimension
Need for reform	+ / -	+ / -
Understanding of impacts	+ / -	+ / -

Note: “+/-” indicates whether the need for reform and impacts of reform are well understood or not along both dimensions.

Sub-component #2: The Purpose of Reform

The *perceived purpose of a reform* is another significant element to consider, as it can affect the salience and relative importance given to the different dimensions (Nelson, Oxley and Clawson, 1997^[43]). Some general rules may be identifiable here, with certain types of reform being intrinsically more likely to be perceived as “economic reforms” designed to promote fiscal sustainability or enhance the flexibility of product and labour markets for example. Furthermore, as with the prospects for reform, the perceived purpose of a reform could be compared with the actual framing intended by policymakers to assess how well aligned they are, including in terms of the accuracy of policymakers’ understanding of the public’s views on the proposed reform.¹³ In Figure 2.5, it is assumed that a reform will be perceived and framed as being driven either by economic goals or by fairness goals. It is also conceivable that a reform may be interpreted as being driven by political goals, in which case its purpose would fit under the *Process Dimension*.¹⁴

Sub-component #3: Key challenges for Reform (General and Sector-specific)

Assessing the *prospects for reform* can help better identify *general challenges* linked to the public's understanding and evaluation of:

- i. The status quo (i.e. to what extent the existing policy setting is “ripe” for reform); and
- ii. The economic and distributional impacts of the proposed reform (i.e. whether reform will improve the status quo or not, for the individual and for society).

In particular, it may bring to light areas where the case for reform is not well aligned with public perceptions and attitudes (either because the need for reform is not clearly perceived on economic/fairness grounds, or because the impacts of reform are not well understood) and may therefore be more difficult to make or easier to oppose. Strengthening the case for reform by addressing potential areas of weakness identified by the data constitutes a first key challenge. This type of challenge applies across reform areas and should therefore feature as a separate element in the PAT.

Many of the key challenges for building public support will be specific to particular policy areas, types of reform and instrument. Desk research, consultation with experts and surveys may be used to identify key *sector-specific or reform-specific challenges*. Appropriate indicators can then be selected or designed to assess the extent of the challenge and monitor how effective the case for reform is in addressing it. As noted previously, the OECD Framework for Assessing Decarbonisation Strategies identifies political economy challenges associated with the use of specific instruments (D’Arcangelo et al., 2022^[4]). The Expert Group highlighted examples of sector-specific challenges in the context of two case studies (reforms of tax and benefits systems and reforms of pension systems) and how these challenges relate to the different dimensions of the PAT. For illustrative purposes, these examples included:

- *Economic Dimension:*
 - Making the link between revenue and spending clear for the public; Increasing willingness to pay (*tax and benefits reform*)
 - Long-term economic impact and sustainability of the reform design (*tax and benefits reform*)
 - Communicating the costs of the status quo (*pension reform*)
 - Limited understanding of *tax and pension systems* and of the expected aggregate/individual impacts of reform
- *Fairness Dimension:*
 - Deservingness of benefit recipients; Target-specific perceptions/beliefs (*tax and benefits reform*)
 - Communicating the costs of the status quo on fairness grounds (*tax and benefits reform*)
 - Making the link between longevity/health outcomes and retirement age (*pension reform*)
 - Long-term distributional impact and sustainability of the reform design; Indexation of pensions (*pension reform*)

Sub-component #4: Means and Solutions for addressing Key Challenges

Finally, a *Means and Solutions* sub-component is designed to indicate possible ways in which the main political economy challenges identified for a specific reform proposal can be addressed. Here again, the Expert Group drew attention to a number of possible solutions to the key challenges highlighted during the discussion of the case studies. These solutions included: choice architecture (to address challenges linked to limited understanding of policy issues); analysis of policy preferences, framing and mental accounting (to help strengthen the perceived link between revenue and priority areas for spending)¹⁵; leveraging the social dynamics of collective action to strengthen tax morale (to increase willingness to pay)¹⁶; information provision and the design of appropriate metrics (to address perception gaps); reform analogies...

Box 2.4. Possible measurement of the PAT's Economic and Fairness Dimensions

The following measures can be used to assess the **prospects for reform** under both dimensions:

Economic Dimension

- **Evaluation of the status quo** in terms of the relevant economic objectives for reform (efficiency, financial sustainability, international benchmarking...)
 - Comparison between the **perceived and actual economic performance** of the existing policy setting.¹
 - *At individual level* (for self) / *At aggregate level* (for the economy as a whole)
 - *In static terms* (strong/weak) / *In dynamic terms* (improving/getting worse)

Assessing the public's evaluation of the status quo provides an indication of how clearly the **need for reform** is perceived on economic grounds. A possible additional element to consider here is how important the economic objectives of the proposed reform are for the public (in terms of salience or preference intensity).

- **Economic impact of reform** on the relevant economic variables
 - Comparison between the **perceived and actual impact of reform** on current economic outcomes:²
 - *At individual level* (will the reform improve economic conditions for me and my household?)
 - *At aggregate level* (will the reform improve economic conditions for society as a whole?)

Measuring these perceptions provides an indication of how and to what extent the **economic impacts of reform** are understood by the public.

Fairness Dimension

- **Evaluation of the status quo** in terms of fairness
 - Comparison between the **perceived and actual distributional impact** of the existing policy setting:
 - *At individual level* (for self) / *At aggregate level* (for society as a whole)
 - *In static terms* (fair/unfair) / *In dynamic terms* (improving/getting worse)

Assessing the public's evaluation of the status quo provides an indication of how clearly the **need for reform** is perceived on fairness grounds. An important additional element to consider here is *what type of fairness principles are used to assess the status quo?*

- **Distributional impact of reform**
 - Comparison between the perceived and actual distributional impact of reform³:
 - *At individual level* (do I receive a fair share of the benefits and costs of reform?)
 - *At aggregate level* (are the benefits and costs of reform shared fairly across society?)

Measuring these perceptions provides an indication of how and to what extent the **distributional impacts of reform are understood** by the public. As noted, Distributional Impact Assessments (DIAs) constitute particularly useful tools that can be used in combination with perceptual data to help identify relevant perception gaps. In addition, attention could also be paid **to differences between the imagined stakeholder matrix** (i.e. the main groups that the public perceives as being impacted by the reform) **and the actual stakeholder matrix** (i.e.

the main groups expected to be impacted by reform, as identified by DIAs or analysis), in line with the measurement recommendations made by the Expert Group (see Section 1.3.1 in the previous chapter). Doing so can highlight possible mismatches regarding the groups that will be most affected by reform, as well as the key constituencies that may mobilise for or against reform. In both cases, these groups may not necessarily align with the “winners” and “losers” of reform in simple material terms.

When measuring the **perceived purpose of reform**, surveys and other methods, including social listening, can help determine the general framing through which the public perceives and evaluates a reform – i.e. whether a reform is driven primarily by economic goals (fiscal sustainability, flexibility, competitiveness...), fairness goals (reducing inequalities...) or another type of goal (political considerations...). More targeted surveys, focus groups and interviews may be needed to elicit policymakers perceptions of the purpose of reform, though studies exist looking at how political leaders (de Geus, Thode and Weidenfeld, 2016^[44]) and civil servants (Civil Service, 2020^[45]) perceive reform.

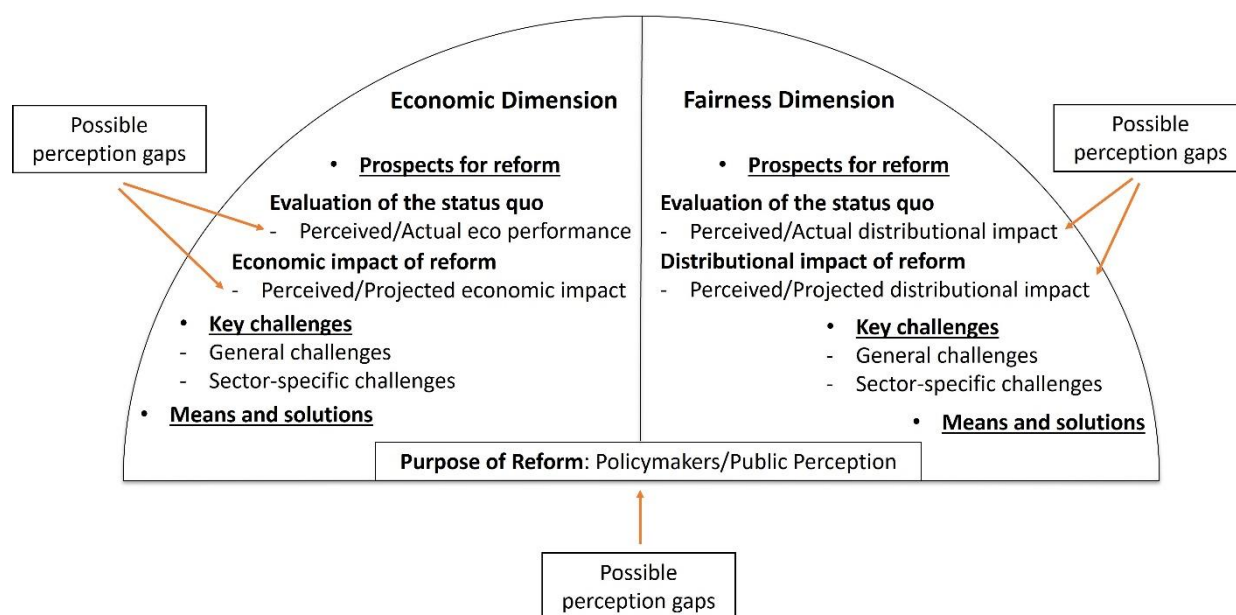
When identifying **means and solutions**, a number of perceptual data highlighted in Chapter 1 offer insights that could be used to strengthen the case for reform and address some of the key challenges listed above. For instance, data on public perceptions of who is responsible for reducing inequality collected through the Opportunities module of the OECD *Risks that Matter* survey could inform efforts designed to increase willingness to pay.⁴ Similarly, developing appropriate indicators, for example on the quality of public spending, could also contribute to address key challenges, notably by strengthening the perceived link between revenue and spending.

Notes:

1. The OECD Risks that Matter survey includes questions relating to social policy that can be used to measure many of the aspects of perceived economic performance identified here (see Annex 1.B). The OECD has also developed over many years a wide range of policy indicators relating to economic outcomes, which can be used to measure actual performance. By comparing these objective and subjective measures, the PAT would aim to shed light on the way in which the public evaluates the status quo and how this relates to actual performance – in line with what (OECD, 2021^[8]) has done for perceived and actual inequality (see Section 1.1.1 in the previous chapter).
2. The perceived economic impact of reform could be measured using dedicated surveys or other data collection tools. Projections by trusted institutions can be used to measure the expected actual economic impact of reform.
3. The perceived distributional impact of the existing policy setting and of the proposed reform can be measured using surveys or other data collection tools. Some relevant perceptual data are already collected in the OECD Risks that Matter survey, for example on the perceived effectiveness and fairness of social benefits (see Annex 1.B). Distributional Impact Assessments (DIAs) represent an important tool for measuring the actual impacts of both the existing policy setting and proposed reform. Their importance is notably highlighted in the European Commission's [2022 Communication on Better Assessing the Distributional Impact of Member-states' Policies](#). Where relevant, DIAs can be complemented with other measures of inequality.
4. See OECD (2023^[46]) for analysis of this data.

As a summary, a more detailed visualisation of the *Economic* and *Fairness* Dimensions of the PAT is presented in Figure 2.6. This includes all of the main sub-components and relevant perception gaps that may be identified through the analysis of these dimensions.

Figure 2.6. Detailed visualisation of the Economic and Fairness Dimensions of the PAT



Behavioural Dimensions of Social Change

Understanding how citizens perceive economic and distributional impacts is essential to build public support for the outcomes of reform. However, policymakers must also consider the behavioural barriers that may affect citizens' views of and ability to comply with the type of social change implied by reform. Failure to take account of these behavioural barriers may undermine the case for reform and limit public support. Based on the input from the Expert Group, the PAT aims to identify the main types of informational, cognitive and behavioural barriers that may be encountered as part of the broader process of social change. These main types of barriers apply across different reform areas and are associated with specific challenges. On this basis, the PAT would include the following *Key challenges*, designed to cover the main types of barriers that can be encountered, as well as possible *Means and Solutions* under the *Behavioural Dimensions of Social Change*:

Sub-component #1: Key challenges – The State of Knowledge on policy issues & reforms

Limited public understanding of policy issues constitutes a significant challenge across a number of reform areas. This challenge is particularly acute in the case of complex issues such as pensions, where there is evidence of information avoidance and engagement with information may be limited despite efforts to provide and facilitate access (Eberhardt et al., 2019^[47]; Dutta-Powell, Court and Gilchrist, 2021^[48]; Eling and Jaenicke, 2023^[49]).¹⁷ More generally, citizens may find it difficult to clearly evaluate the economic and distributional impacts of reform. Again, this can be the case even when official estimates are provided, as different methodologies and models can lead to different and competing evaluations of these impacts (Bourguignon and Landais, 2022^[50]). The implications for the public acceptability of reforms are significant. For instance, limited technical understanding of policy issues tends to reduce the effectiveness of economic arguments, which often underpin policymakers' case for reform, in public debates. This also implies that citizens may view the trade-off between the equity and efficiency aspects of reform in very different terms from policymakers. Furthermore, a limited technical understanding of policy issues does not necessarily imply that people will be likely or willing to change their views when provided with new and more complete information. In addition to the public's "literacy" (*how well is an issue or the effects of a policy understood?*), being able to assess the public's *openness to information* would provide valuable

insight regarding the relevance and possible effectiveness of information campaigns on a particular policy issue.

Possible *means and solutions* for improving engagement with information and addressing challenges linked to the state of knowledge include:

- Peer learning and good practices on public communication and information provision;¹⁸
- The experimental testing of messages and their impact on beliefs;¹⁹
- Exploring different forms of communication, including the use of representative “personas”, qualitative and narrative data, participatory and deliberative processes;
- Reform analogies (designed to demonstrate that similar types of reform have been successful in other areas, for example by using energy subsidy reform as an analogy for tax reforms...);
- Choice architecture (design of fair default options in the case of pension reform...).

A broader insight to be drawn on the state of knowledge is that the case for reform should start from – and to a degree be grounded in – the existing conditions of public debate and take account of relevant informational and cognitive constraints, as they shape public responses to and support for reform. Policymakers may consider possible means to lift some of these constraints and change the state of knowledge. If the relevant perceptions and attitudes cannot be shifted however, the state of knowledge may need to be viewed as a hard constraint to which the design and communication of reform must be adapted.

Sub-component #2: Key challenges – The effects of uncertainty on support for reforms

Even in situations where the public is well informed and has a good understanding of the issue and the impacts of reform, *uncertainty* can prevent the passage of reform. This barrier is well identified in the political economy literature, where it is often analysed as a source of status quo bias and a constraint for public acceptability (Fernandez and Rodrik, 1991^[51]; Drazen and Grilli, 1993^[52]; Jain and Mukand, 2003^[53]; van Wijnbergen and Willems, 2016^[54]; Potter, 2018^[55]).

Different forms of uncertainty may affect public acceptability:

- i. Uncertainty regarding who will “win” and “lose” from reform in economic terms;
- ii. Uncertainty regarding the transition costs involved in moving from the established status quo to a new system or outcome;
- iii. Uncertainty regarding the effectiveness of a reform in terms of achieving its stated objectives;
- iv. Uncertainty regarding the government’s ability to put adequate and effective support measures in place as part of a package to ease the costs of transition.

These sources of uncertainty cover elements that are important for other dimensions of the PAT: perceived economic and distributional impacts of reform (*Economic* and *Fairness* dimensions); the government’s credibility (*Process* dimension). As such, uncertainty may constrain policymakers’ ability to make an effective case for reform on particular grounds, in similar fashion to a limited technical understanding of policy issues. Identifying and addressing sources of uncertainty may however open up opportunities for strengthening public support for reform through the provision of appropriate information, as highlighted by Dechezleprêtre et al. (2022^[5]).

Sub-component #3: Key challenges – People’s “margins” for adapting to social change

The costs of adjusting to social change go beyond the immediate economic costs that reform imposes on individuals. This may include less immediate psychological and behavioural costs, as reform changes the environment in which individuals take decisions, modifies the incentives they face and mandates or prohibits certain types of behaviour. In this respect, a behaviourally informed assessment of

the “winners” and “losers” of reform based on these broader costs may help better identify the key constituencies affected by reform, including potential sources of opposition to reform among populations that have limited margins to adapt their behaviour.²⁰ Consideration of these costs may also influence the design of reforms and notably decisions regarding the need for compensation, support and transition measures, as well as the type of measures that should be put in place to accompany the process of social change. In this perspective, focus should be put on what is required to change actual behaviour, both at individual and collective level, beyond simply changing the incentives that individuals face. As a further point of interest, the Expert Group highlighted the fact that opposition to reform based on the unequal ability to adapt to social change is often expressed on equity grounds and refers to principles of fairness.²¹

Sub-component #4: Key challenges – Area-specific behavioural elements

In addition to these general themes, particular behavioural elements or traits will be relevant for reform design and communication in specific areas. The case studies discussed by the Expert Group highlighted several examples of *area-specific behavioural elements* to consider, including:

- **Tax and benefits reform:** Status quo bias and loss aversion (e.g. in the case of reforms designed to reduce or eliminate distortionary tax exemptions); Framing effects that influence the strength or salience of the link between areas of public revenue and spending (e.g. mental accounting in the case of a carbon tax with revenue recycling); and
- **Pension reform:** Heterogeneity in attitudes and preferences towards risk; Time-inconsistent preferences (myopia and hyperbolic discounting).

Box 2.5. Possible measurement of the PAT's Behavioural Dimensions of Social Change

The following measures can be used to assess the different sub-components for this dimension:

State of Knowledge

- **Public literacy on policy issues** (financial literacy, pension literacy, tax literacy...) can be measured using specifically designed tests or based on evidence from existing surveys (e.g. on tax perceptions) to determine how well people understand an issue and the effects of policy (overall and on them). For example, Dechezleprêtre et al. (2022^[5]) construct a *Knowledge Index* that measures people's level of understanding of the causes and impacts of climate change. Different OECD sources and surveys can be used in similar fashion to assess public perceptions and literacy in particular policy areas, including tax and pensions. Otherwise, public literacy can be assessed based on the literature or dedicated surveys and tests.
- **People's self-assessed knowledge of policy issues** can be measured through surveys, if possible in conjunction with measures of policy literacy, to determine how well people feel they understand an issue and the effects of policy. Comparison between these two objective and subjective measures of literacy (actual and perceived knowledge) can provide an indication of people's **openness to information** and through it of the likely effectiveness of information campaigns in shifting their perceptions and strengthening the case for reform.
- **Existing evidence on public engagement with information** can also provide useful insights on people's openness to information in specific areas, notably in situations where forms of information avoidance are observed such as in the case of pensions (see above). More direct and onerous approaches can be used to measure openness to information through experimental surveys or protocols designed to measure willingness to pay for information (Alesina, Miano and Stantcheva, 2023^[56])¹ or to assess belief adjustment and the effectiveness

of information (Alesina, Stantcheva and Teso, 2018^[57]; Duch and Torres, 2023^[58]). Evidence on people's openness to information can be related in turn to possible perception gaps identified under the **Economic and Fairness dimensions** (see Figure 2.6 above). In this perspective, the existence of perception gaps combined with low openness to information would suggest that the impact of communications campaigns could be limited and that policymakers will need to consider appropriate methods for conveying evidence in order to shift public perceptions.

Uncertainty

This sub-component can be measured through added questions on people's degree of uncertainty/confidence in their views regarding key variables that affect support for reform.

As detailed above, these variables may include:

- *Who will gain and lose from reform? (self; groups);*
- *The effectiveness of reforms;*
- *The government's credibility in implementing reform and compensation measures.*

Uncertainty and the impact of information can also be assessed using other methods (focus groups...).

Margins for adapting to social change

- **Capacity to adapt** can be measured first of all in material/financial terms, by looking at objective measures of income instability and at perceived income insecurity.²
- Assessing the **non-financial margins required to adapt to social change** implies that one determines first what behavioural change is asked of individuals and key groups of stakeholders.³ From there, the range of "losers" from and potential opponents to reform can be broadened by identifying populations with a limited capacity to change their behaviour or who face higher adjustment costs.

Additional elements to consider may notably include: (i) **how the implied behavioural change is evaluated** (positively/negatively), as this may also influence people's willingness to support reform; and (ii) **preference intensity** could also possibly be measured as another indicator of willingness to change behaviour.⁴

Area-specific behavioural elements that are relevant for reform design or communication

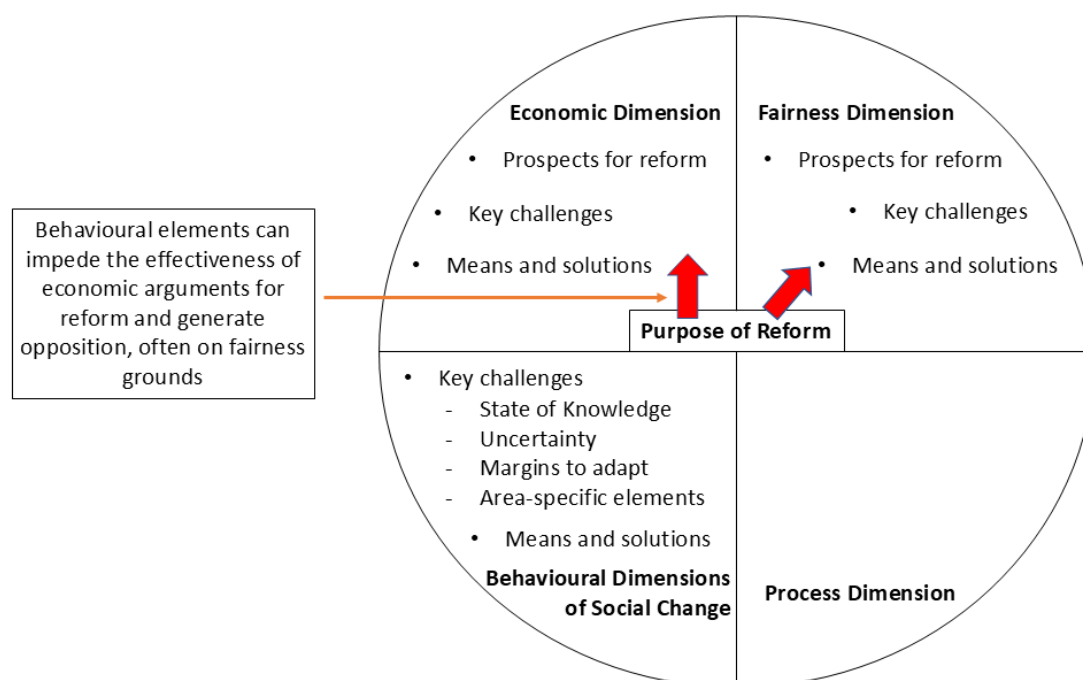
The relevant elements for specific policy areas would be identified based on desk research and/or consultation with experts. These elements may be measured or assessed in applied contexts using surveys and experimental methods. OECD work on the application of behavioural insights can provide resources for understanding how reform design and communication should be adapted in light of the role played by behavioural elements.

Notes:

1. An interesting finding in this survey experiment is that, all things considered, those who have the largest misperceptions are less willing to pay to receive the correct information. This is either because they are more confident in their views or hold strong beliefs and are less open to new information.
2. See for example (OECD, 2023^[59]).
3. See OECD (2025, pp. 20-21^[37]) for a case study on how behavioural science has been used to identify the main barriers to the adoption of sustainability measures by small- and medium-sized enterprises in the Netherlands. The OECD BASIC and LOGIC frameworks provide guidance on how to apply and mainstream the ethical use of behavioural insights in public policy (OECD, 2019^[60]; 2024^[61]).
4. This point is in line with the Expert Group's recommendation to focus on the *Intensity of Policy Preferences* as a key factor to measure (see Section 1.3.1 of the previous chapter for further detail).

As a summary, a more detailed visualisation of the *Behavioural Dimensions of Social Change* covered by the PAT is presented in Figure 2.7. This includes the main sub-components and some of the channels through which these behavioural factors may affect other dimensions of public acceptability.

Figure 2.7. How the Behavioural Dimensions of Social Change can affect the case for reform



Process Dimension

As highlighted in Section 2.2.1, a *Process Dimension* is needed to capture the sense of legitimacy that a given reform can draw, or not, from the political and institutional processes used to design, implement or justify it. Process legitimacy is an important determinant of public acceptability and is distinct from the support that can be derived from the outcomes of reform and from the presence or absence of behavioural barriers to social change. The current section seeks to identify the main sources of process legitimacy that apply across reform areas. Further questions on how the *Process Dimension* interacts with the other dimensions of the PAT and on its relative importance across different reform areas are also considered.

A number of key procedural elements contribute to the legitimacy and acceptability of reforms. These key elements can be used to specify the content of the *Process Dimension*. Building on the elements identified in *Making Reform Happen* and on input from the Expert Group, the following *Key Challenges* and possible *Means and Solutions* for addressing them should be considered.

Sub-component #1: Key challenges – Administrative and technical capacity

Administrative capacity is an essential condition for the successful implementation of reforms (Jain and Majumdar, 2016^[62]; Khemani, 2019^[63]). Insofar as it helps determine whether a reform delivers on its objectives and meets public expectations, administrative capacity constitutes one of the main sources of legitimacy both during and after the implementation stage of reform.²² This also covers the technical capacity to evaluate and monitor the economic and distributional impacts of reforms through the development of appropriate tools, including macro-econometric models, micro-simulation models and surveys.²³ Administrative and technical capacity can be related to the *uncertainty* component presented

under the *Behavioural Dimensions of Social Change*. Building and demonstrating sufficient capacity can help address issues of credibility and commitment that governments may face, notably in deploying compensatory measures. Additional and adapted capacity may also be necessary to address some of the barriers to reform identified under the *margins to adapt* component and facilitate behavioural change.

Sub-component #2: Key challenges – Evidence base

Establishing a strong evidence base to support the case for reform constitutes a key recommendation from *Making Reform Happen* (see Section 2.1.1 above). Particular emphasis should be put on two aspects: (i) the extent to which appropriate evidence is produced and integrated into the reform process, notably at the design stage; and (ii) the extent to which it is effectively communicated and used to set common terms for policy and public debates, as outlined for example in (OECD, 2023^[64]). Trusted information providers can contribute on both counts, notably when they have a mandated role in the reform process and sufficient institutional weight to influence it.²⁴ Developing and using effective metrics to inform policy and public debates – i.e. ones that are relevant to the policy issue and adapted to the public's concerns and understanding of the issue – constitutes another important element to consider.²⁵

Sub-component #3: Key challenges – Political conditions

Political conditions are often exogenous to the reform process but tend nonetheless to play an important role in ensuring public support and through it the success or failure of reform. The main political success factors identified in *Making Reform Happen* (Tompson, 2009^[17]; OECD, 2010^[18]) as contributing across reform domains include: (i) strong electoral mandates; (ii) government cohesion; and (iii) the timing of reform in the electoral cycle. These factors may be further complemented by additional indicators (general or sector-specific) based on analysis of the literature, by subjective indicators and by measures of trust in government, civic engagement or political efficacy as proxies for satisfaction with political processes.²⁶

Sub-component #4: Key challenges – Engagement with stakeholders

Engagement with stakeholders represents an essential and well-identified condition for overcoming opposition to reform and ensuring broad legitimacy across reform areas. National institutional frameworks need to be taken into account, with effective consensus-building institutions and a culture of social dialogue often highlighted as factors that contribute to promote public acceptability and facilitate reform (Tompson, 2009, p. 55^[17]). Even in the absence of established institutions of this kind, participatory processes may provide means for doing so. Discussions by the Expert Group identified several key characteristics for assessing engagement with stakeholders, notably (i) its inclusive character and capacity to ensure that all voices are heard²⁷; and (ii) the capacity to reach out to and mobilise constituencies in favour of reform, as well as engaging with constituencies that are opposed to it (de Geus, Thode and Weidenfeld, 2016^[44]). Engagement of this kind should be extended when additional stakeholders have been identified on the basis of their limited *margins for adapting* to the changes implied by reform.

Box 2.6. Possible measurement of the PAT's Process Dimension

The following measures can be used to assess the different sub-components for this dimension:

Administrative capacity

This component would check, first of all, the extent to which capacity is considered and assessed throughout the different stages of the reform process. Benchmarking and existing tools and frameworks can be used to measure and assess capacity needs.¹ Capacity-building measures introduced as part of the reform process (recruitment, technical training, peer learning, building or introduction of appropriate tools...) can also be assessed, as well as the pilot testing of these measures where applicable. The assessment of capacity can be complemented with subjective measures of satisfaction with public services (surveys, online tools, analysis of digital traces...), as done for example in the *OECD Survey on Drivers of Trust in Public Institutions* (OECD, 2024^[23]) or in the case of the Australian Public Sector reform agenda (see Box 2.1).

Evidence base

Benchmarking, standards and good practices for evidence-based policymaking can help assess to what degree the available information is effectively integrated into the reform process. Similarly, existing recommendations and good practices on public communication can help assess how effectively evidence is communicated in policy and public debates (OECD, 2021^[22]; 2023^[64]). In addition to these procedural indicators, the reception of the evidence and its effectiveness in influencing policymakers and citizens on key issues or variables (e.g. effective communication of reform objectives, impacts or the costs of the status quo) can also be assessed using traditional methods (surveys, interviews, focus groups...) and social listening tools (applied to parliamentary texts for policy debates and to news media sources and digital traces for the public debate). On this topic, see for example (OECD, 2024^[23]) and the case study on social listening provided in Section 2.3.5 below.

Political conditions

A series of key political variables are identified in *Making Reform Happen*, including having a strong electoral mandate for reform, government cohesion, a stable political horizon and sufficient time to prepare a reform (Tompson, 2009^[17]). These variables and indicators can be used as a starting point and extended through further analysis of the literature in specific reform areas. Subjective measures can complement these indicators. For example, measures of perceived legitimacy could be used to assess the strength of the mandate for reform, in addition to the indicator proposed in (Tompson, 2009^[17]) (presence or absence of a reform pledge in the government's electoral programme), through surveys, focus groups or social listening tools.

Engagement with stakeholders

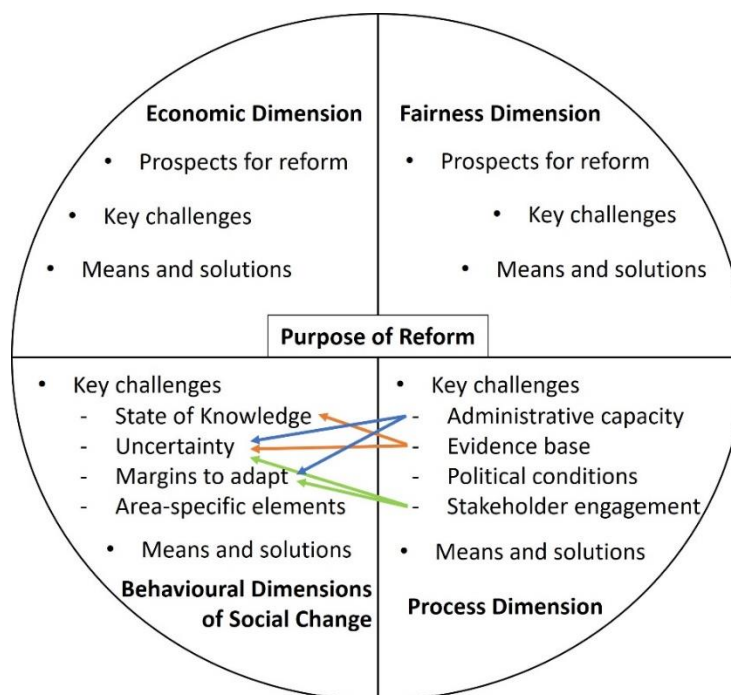
Making Reform Happen identifies a series of key variables associated with communication and engagement with stakeholders: use of consensus-building institutions, formal concertation with social partners, respect for acquired rights, role for opponents of reform, activation of constituencies in support of reform (Tompson, 2009^[17]). These variables and indicators can be used as a starting point and extended through further analysis of the literature in specific reform areas. Ongoing OECD work on facilitating and promoting citizen participation throughout the policy process can also provide valuable insights and recommendations, as well as possible indicators, in this area (OECD, 2022^[65]).

Note:

1. See, for example, the OECD *Administrative Capacity Building Self-Assessment Instrument* in the area of regional development and structural cohesion (OECD, 2021^[66]).

As a summary, a more detailed visualisation of the *Process Dimension* is presented in Figure 2.8. It includes the main sub-components and some of the ways in which elements of process may interact with the components identified under the PAT's *Behavioural Dimensions of Social Change*.

Figure 2.8. Elements of process can help address some of the behavioural barriers to reform



2.3. A complementary toolkit to operationalise the PAT

The general framework detailed in the previous section can help improve the OECD's analysis and advice on reforms by ensuring that considerations of public acceptability are taken into account more systematically. It contributes to do so by (i) “mapping” the key dimensions that matter for the public acceptability of reforms; (ii) providing a means to identify and organise the relevant perceptual and behavioural data; and (iii) harnessing the insights from this body of data to better understand how well a proposed reform aligns with public views and demands.

A set of complementary tools is needed to support policymakers in designing and implementing concrete reform proposals for specific areas and national settings. These tools aim to operationalise the general framework for use in applied contexts. Section 2.3 outlines the proposed elements for a toolkit that governments can use. These elements include:

- **A general checklist** to help ensure that all the elements relevant to public acceptability are taken into account during the reform process (Section 2.3.1);
- **Sectoral roadmaps** to determine which dimensions of public acceptability are likely to matter most for a specific type of reform and where the main challenges lie. These roadmaps will help “configure” the PAT for use in particular areas and contexts (Section 2.3.2);
- **Data review and collection** to identify “reform-breaking data” and indicators to assess how effective the case for reform has been in building public support. These indicators would contribute to deepen and contextualise standard opinion surveys measuring support for reform by providing a more detailed picture of the key factors that shape public responses to reform. The identification

of reform-breaking data could help policymakers decide whether and when it may make sense to halt a particular reform effort in light of the failure to shift key public perceptions or attitudes (Section 2.3.3); and

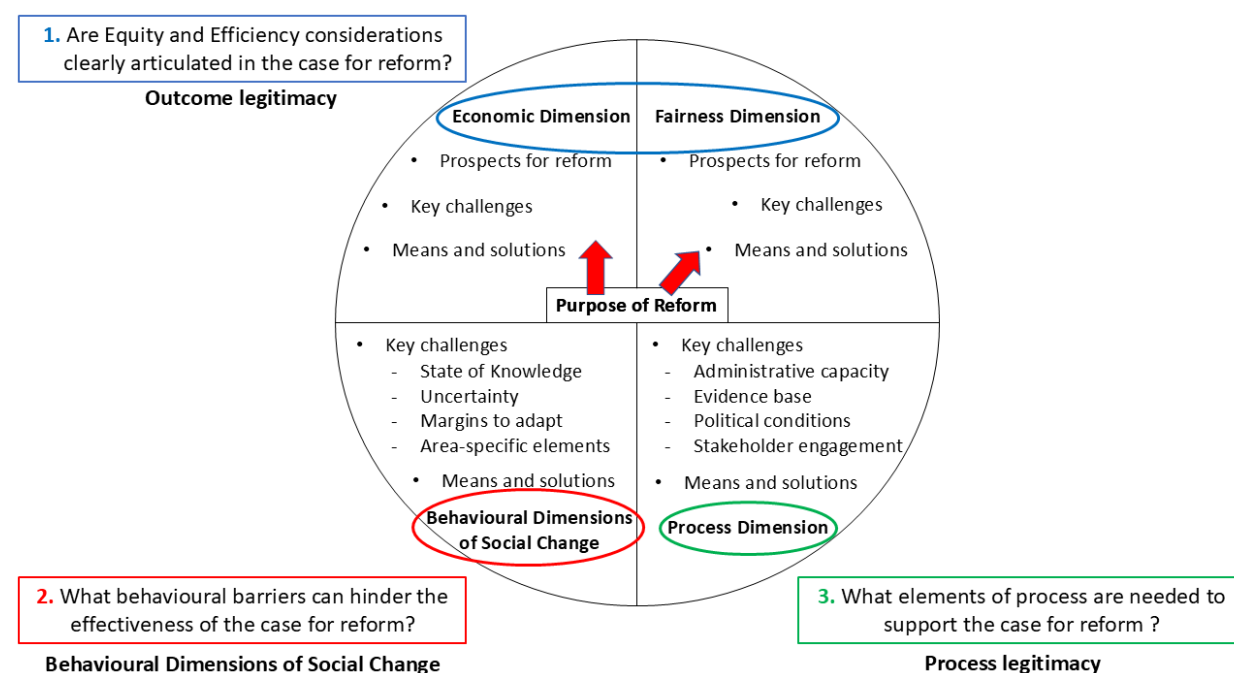
- **A social listening tool** to help assess how the public is responding to the main aspects of the government's case for reform.

The PAT is meant to be applied in conjunction with the existing tools and methods that governments use to inform the design, implementation and communication of reforms. As such, the general framework and complementary tools provided by the PAT can be integrated, as needed, into the regular processes for designing, implementing and communicating reforms. Doing so can help enhance these processes through the added insights the framework and tools offer on public acceptability. The PAT is notably conceived to work alongside and add to existing tools and methods that are widely used across OECD countries, notably: (i) macro-econometric and micro-simulation models for assessing the economic and distributional impacts of proposed reforms; and (ii) communication tools to disseminate information about the effects of reform to the public.

2.3.1. General checklist

A general checklist can provide policymakers with practical guidance on how to apply the PAT in a way that is effective and systematic. In doing so, it can help organise the different dimensions of public acceptability covered by the PAT and ensure that their implications are taken into account at relevant stages of the reform process in order to build a strong case for reform. A prototype checklist is presented in Box 2.7 below and detailed in Annex 2.A at the end of this chapter for further development and pilot application.²⁸ It builds on and extends a similar “reformer’s checklist” from *Making Reform Happen* (OECD, 2010, p. 16_[18]) by adding a specific focus on the conditions for public acceptability. It also takes the standardised checklist developed for the *OECD Principles for Ethical Behavioural Science in Public Policy* (OECD, 2022_[67]) as a possible template.²⁹

Figure 2.9. A general checklist can be built around the framework provided by the PAT



The checklist would reflect the structure and key features of the PAT's general framework. On this basis, it would be organised around the 3 guiding questions previously identified as essential steps for assessing the public acceptability of reforms (see Figure 2.3). Figure 2.9 above provides an overview of the structure and content of the PAT.

The checklist should start by considering the intended purpose of the reform. Policymakers may have different motivations for reform, including reform on economic grounds; reform on equity grounds; and reform on political grounds. Understanding these motivations provides valuable preliminary insight as they are tied to particular objectives and will frame the case for reform by putting emphasis on specific dimensions of the PAT. For example, in the case of pension reform, objectives may include (i) ensuring the long-term financial sustainability of the pension system (*Economic Dimension*); (ii) increasing the adequacy of pensions to reduce old-age income poverty (*Fairness Dimension*); (iii) promoting greater individual responsibility for retirement choices or facilitating pension decisions (*Behavioural Dimensions of Social Change*); or (iv) strengthening the governance and stability of pension systems (*Process Dimension*). A clear understanding of the motivation and key objectives of a reform can help frame the case for reform, anticipate how the public is likely to respond to it and identify key challenges that will need to be addressed.

An additional issue to consider here is the extent to which public acceptability constitutes a relevant concern for policymakers. Reforms are not always designed with the general public in mind. Policymakers may for instance target particular groups as the relevant constituency in the case of reforms on political grounds. Even in this case, it can be argued that public acceptability should remain an important concern as it is an essential condition for the long-term political “viability” of a reform and for avoiding problems of reform reversal and “dead-end reforms” (i.e. reforms that are enacted but prevent any further reform activity in their area over the medium/long-term due to the negative impact they have on perceptions, attitudes and overall public acceptability).

From there, the general checklist would follow the 3 main stages set out in the PAT for assessing the public acceptability of reforms. This implies looking at the following broad questions:

- 1) **To what extent are policymakers able to clearly articulate the equity and efficiency implications of reform?** As argued in Section 2.2.1, insofar as the economic and distributional impacts of reform represent the main outcomes of interest to citizens, the *Economic* and *Fairness* dimensions can be taken to cover the “*outcome legitimacy*” of a reform and constitute key conditions for public acceptability.
- 2) **How well are the behavioural barriers to reform understood?** Again, as argued in Section 2.2.1, outcome legitimacy may not be enough in and of itself to bring about reform. A second essential step for policymakers consists therefore in identifying the relevant behavioural implications of reform and the ways in which they may undermine the public's understanding of the case for reform and willingness to support or comply with reform. The PAT proposes to take proper account of these *Behavioural* dimensions. In order to do so, it considers the broader informational, cognitive and behavioural implications of the type of social change introduced by a reform, the barriers they may present and the measures that may be needed to accompany individuals in making this change.
- 3) **What role do elements of process play in strengthening or undermining the case for reform?** Reforms can also draw on a form of “*process legitimacy*” separate from their outcomes and a third and final step consists in assessing the conditions that contribute to it. These elements are considered under the *Process* dimension of the PAT. The relative importance of outcome legitimacy and process legitimacy will vary across reforms areas. This issue will be addressed when developing sectoral roadmaps for reform (see Section 2.3.2 below).

Finally, the checklist should also include general principles or good-practices rules that can help better integrate public acceptability into the design of reforms. For example, the discussion of pension reform by the Expert Group highlighted a series of “*proportionality rules*” that can help address several key challenges by exploiting the interactions between different dimensions of the PAT:

- **Proportionality between the *Margins to Adapt* and the degree of *Stakeholder Engagement*:** The more important the adjustment and behavioural change demanded, the greater is the need for consultation (and/or administrative capacity to facilitate the transition). This would reflect a general principle of “*nothing about me decided without me*”.
- **Proportionality between the *State of Knowledge* and the *Evidence Base*:** The less an issue is understood, the more focus should be put on providing information and on engagement with stakeholders. This would reflect the principle of “*not taking people for fools*”.

Further research could be conducted to identify general and sectoral good-practice rules of this kind, based on country experience.

To facilitate the application of the PAT, the checklist can be tailored to fit the key characteristics of a particular reform proposal and context, as well as the available data. Data constraints mean that it may not be possible or cost-effective to cover all the relevant dimensions of the PAT and implement the full checklist presented in Annex 2.A. Consideration would therefore be given in each specific case to possible streamlining and tailoring of the checklist to identify what are the areas of key importance for assessing the public acceptability of a reform and what indicators can be used to do so. Designing roadmaps for reform (Section 2.3.2) and strategies for data collection (Section 2.3.3) can help identify the key questions and indicators. Where perceptual or behavioural data are not available for specific dimensions of the PAT, alternative options can be explored for measuring and assessing public acceptability or ad hoc tools can be implemented (surveys, survey experiments...).

Box 2.7. Outline of a possible Reformer's Checklist

1st step: Assessing outcome legitimacy – To what extent does the case for reform clearly articulate the equity and efficiency implications of reform for the public?

Purpose of reform

- *What is the intended purpose of reform?*
 - Is that purpose clearly established and understood by policymakers?
- *How well is the intended purpose perceived by the public?*
 - Is the case for reform effectively and coherently framed around its intended purpose?
 - Are good practices and OECD guidelines in terms of public communication being followed?

Prospects for reform

- *Do policymakers clearly understand the expected economic & distributional impacts of reform?*
 - Has the performance of the existing policy setting been properly assessed or benchmarked?
Has the economic impact of reform been properly assessed?
 - Has the distributional impact of the existing policy setting and proposed reform been assessed?
 - Does the assessment indicate that:
 - A majority of the population is expected to benefit from reform (*Economic dimension*)?

- The reform is expected to reduce inequality overall or for the key groups affected (*Fairness dimension*)?
- *Does the case for reform take proper account of public views on the need for reform?*
 - How well aligned is the case for reform with the public's understanding of:
 - The need for reform?
 - The likely impacts of reform?
 - Have communication campaigns sought to address the key perception gaps identified? How effective have they been in shifting the relevant attitudes and perceptions?

2nd step: Taking account of the behavioural dimensions of social change – What behavioural barriers may undermine support for reform?

State of Knowledge

- Can the public's level of knowledge and openness to information be assessed? Have the implications been taken into account when designing communication around the reform?
- How likely is the public to engage with quantitative evidence? Is this reflected in the type of information and modes of communication used to build public support for reform?

Uncertainty

- Who do people perceive to be the main “winners” and “losers” of reform?
- How well do these perceptions align with the expected “winners” and “losers”?

Margins to adapt

- What behavioural adjustments are demanded by reform? Have groups with limited margins to adapt been identified?
- Have appropriate support, compensation or transition measures been put in place? Is the public sufficiently aware of these accompanying measures?

3rd step: What elements of process are needed to support the case for reform?

Administrative and technical capacity

- *Is there appropriate administrative and technical capacity in place to deliver on reform objectives?*
 - Have capacity needs been assessed and integrated at all stages of the reform process?

Evidence base

- *How well is the evidence used?*
 - To what extent has the design of reform been informed by the evidence?
 - How well has the evidence been communicated to the public? Has focus been put on ensuring that the messaging is coherent and effective, in line with existing good practices?

Political conditions

- *Have the key political conditions for reform been satisfied?*
 - Is there an electoral mandate for reform and is it clearly perceived by the public?
 - Does the reform have clearly identifiable “owners” and how are they perceived by the public?

- *Is the expected timeframe for design, adoption and implementation of reform realistic?*
 - Does the timeframe for reform allow sufficient time for effective communication and consultation, in light of the challenges identified?

Stakeholder engagement

- *How effective and inclusive has consultation with key stakeholders been?*
 - Is there a strategy in place for engaging with the constituencies threatened by reform?
 - Have efforts been made to engage with and mobilise constituencies in favour of reform?
 - Have OECD guidelines and good practices on stakeholder engagement been applied?
- *Has the role of stakeholder engagement been taken into account when designing the reform?*
 - Can consultation increase support for reform by helping address challenges related to uncertainty about reform or identifying ways to facilitate adaptation?

2.3.2. Sectoral roadmaps for reform

To accompany the general checklist, sectoral roadmaps for reform can be drawn up to provide more detailed guidance and inform concrete reform proposals. The general framework is designed to help integrate considerations of public acceptability *ex-ante* into the reform process and organise the available data. The insights generated using the general framework can be used to develop applied roadmaps for reform that are adapted to the particular conditions encountered by policymakers. These sectoral roadmaps would notably reflect the relative importance of the PAT's different dimensions and specific interactions between them *within* given policy areas and national settings. They would also focus on the *key challenges* that the case for reform will need to address, as well as on the appropriate *means and solutions* for addressing them.

The following resources can be used to help develop sectoral roadmaps that are tailored for specific reform areas and national settings:

- **Insights from OECD analysis** on the key challenges for reform in specific areas and countries, building on the general recommendations for reform contained in the *Economic Policy Reforms: Going for Growth* reports, as well as on the detailed economic surveillance of countries provided through the *Economic Surveys*, and on in-depth sectoral studies conducted in specialised OECD publications such as *Pensions at a Glance* or *Tax Policy Reviews*. Taking the area of tax policy as an example, Table 2.1 offers an illustration of the added concrete insights that can be drawn to guide reform efforts by applying the PAT (3rd column on the *Relative importance of the different dimensions of public acceptability*), compared to a more traditional political economy analysis (2nd column on *Key political economy challenges*).
- **Lessons from previous reform episodes** in the area considered and in cases that are comparable in terms of national context, challenges faced and/or institutional settings. These lessons can be collected through different means, notably:
 - **Cross-country comparative analysis** on the conditions for the public acceptability of particular types of reform. Similar work has already been conducted by the IMF on the political costs of different types of reform, combining data-sets on structural reforms and on electoral outcomes (Ciminelli et al., 2019^[68]; Alesina et al., 2023^[24]) (see Box 2.2 above). This work could be extended to cover issues of public acceptability, for example (i) through *modelling* of the possible relations between key subjective factors identified and the successful implementation of reforms; or (ii) by looking at the longer-term impact of past reforms on public perceptions and through this on the feasibility of future reforms in the same area.

- Another interesting approach could consist in looking at the “**actual roadmaps**” from previous reform episodes (i.e. what shape the government’s intended case for reform ended up taking in practice and what grounds dominated public debate). These actual roadmaps can help better understand what arguments and dimensions the public was receptive to.³⁰ Identification and analysis of these actual roadmaps would be conducted through case studies of relevant reform episodes and interviews of policymakers and stakeholders involved as well as of experts.

Sectoral roadmaps also provide an opportunity to adapt and streamline the general checklist in a way that fits more closely with applied conditions. The sectoral roadmaps are designed to help policymakers specify and fine-tune their case for reform based on a more detailed assessment of key challenges and the relative importance of different dimensions for public acceptability in the policy areas and contexts considered. On this basis, a subset of relevant questions can be selected from the general checklist to produce a streamlined checklist that is adapted to the conditions encountered for a specific reform proposal. Additional questions that do not feature in the general checklist may also be included. These streamlined checklists may be easier to implement and less onerous in terms of the data required.

Table 2.1. Examples of sectoral insights on the public acceptability of tax reform

Selected representative examples of tax and benefit reforms	Key political economy challenges	Relative importance of the different dimensions of public acceptability	Possible analogies with other areas
Health taxes Ex: Increasing tobacco excise duties	• <i>Fairness concerns</i>: The tax is regressive • <i>Behavioural aspects</i>: The tax aims to change individual behaviour and reduce a negative externality	• Efficiency tends to dominate fairness concerns in public debates • The purpose of the tax matters: Its aim is viewed as legitimate	• Other “sin taxes” (sugar-sweetened beverages...) • Other taxes aimed at changing behaviour in situations with negative externalities
Property taxes Ex: Phasing out of mortgage tax relief	• <i>Equity/Efficiency trade-off</i>: The impact differs across households (recent buyers lose out) • <i>Status quo bias</i>: The tax advantage is capitalised in house prices; Some households face adjustment costs • <i>Salience of property as an issue</i>	• Status quo bias tends to dominate public debates, even when the existing system is poorly designed • As a result, argument for reform is hard to make on equity grounds	• Other areas that involve reforming an existing system to which people have adapted their expectations and behaviour
Financing of social protection Ex: Introduction of Social Security Contributions in systems based on Non-Tax Compulsory Payments	• <i>No equity/efficiency trade-off</i>: Strong argument for reform on both grounds • <i>Behavioural aspects</i>: Uncertainty over outcomes and transition costs (scale and distribution)	• Behavioural aspects may dominate both equity and efficiency arguments for reform • Reducing uncertainty and accompanying individuals throughout the transition process should be key priorities	
Environmental taxes Ex: Increasing the price of carbon and recycling the revenue	• <i>Equity/Efficiency trade-off</i>: Efficient instrument, but recycling is needed to compensate for the uneven costs of adjustment • <i>Behavioural aspects</i>: The tax aims to change behaviour and margins to adapt may be limited for certain groups • <i>Salience of carbon tax</i>	• Economic and behavioural issues (cost of living; adjustment costs) tend to translate into fairness concerns • Compensation is hard to do well and credibly, which may limit its effects (issues of capacity, uncertainty and trust) • Risk that (i) recycled revenue gets discounted over time; and (ii) the carbon tax is associated with the overall increase in fuel prices (ex. of the <i>Gilets Jaunes</i>)	• Limits of the analogy between health taxes and environmental taxes: In the case of the proposed increase of the carbon tax in 2018 in France, the expectation may have been that a logic similar to that seen with health taxes would apply, with the common benefits of behavioural change overcoming equity considerations (episode of the <i>Gilets Jaunes</i>)

Source: OECD Secretariat – Presentation to the OECD Expert Group on New Measures of the Public Acceptability of Reforms.

2.3.3. Data review and collection

Sectoral roadmaps can help identify the key subjective factors that are needed to ensure the case is well understood and can gather sufficient public support. In turn, measurement of these subjective factors can provide valuable insight on:

- How well aligned the government's case for reform is with public perceptions, attitudes and preferences and how difficult it is likely to be to make this case;
- Which public perceptions, attitudes and policy preferences will need to be leveraged or shifted in priority to ensure sufficient support; and
- How the case for reform may need to be adapted in light of the constraints created by public perceptions, attitudes and preferences.

To facilitate the application of the PAT, a review would be conducted of the available relevant data collected through existing OECD tools (*Risks that Matter* survey; *Drivers of Trust in Public Institutions* survey...), as well as through the main national and international sources. Where key data gaps are identified, consideration would be given to the types of additional data that are needed and the most effective means through which they can be collected. Avenues for doing so may include the consolidation and merging of existing datasets, notably administrative data, or the setting up of an *OECD Perceptions Database* to compile key data (see Section 1.4 in the previous chapter).

Measurement of these factors can also help identify “reform-breaking data” – i.e. perceptions, attitudes or preferences that are of crucial importance for the case for reform and without which it is unlikely to be understood or accepted by the public. Once identified, these perceptions, attitudes and preferences can be used as a goal or indicator against which governments can assess whether and to what extent they have been successful in making the case for reform.³¹ Failure to shift or maintain enough of these key factors could also provide a useful indication of when it may make sense to bring a particular reform effort to a halt. This would be done on the grounds that the case for reform was not successfully made or understood, the conditions for public acceptability are not met and that a reform, even enacted in this context, would lack sufficient legitimacy and thereby run the risk of being reversed or blocking future opportunities for reform in this area (i.e. so-called “*dead-end reforms*”).

2.3.4. Social listening tool

Efforts to monitor the political and public debate around specific reforms could further increase the relevance of the proposed PAT. Similar strategies and capabilities for “*social listening*” have been developed during the COVID-19 pandemic (Alfonsi et al., 2022^[69]). These strategies have generally aimed to improve public health communication through a better understanding of people's perceptions of issues and risks, of the way in which communication is received by different communities and of the “communication needs” of these communities. They have also been used to analyse the public acceptability of sanitary measures during the pandemic, including vaccine mandates (McGowan, 2022^[70]; Spitale, Biller-Andorno and Germani, 2022^[71]). More broadly, countries' experience with the use of social listening tools has been reviewed by the OECD and good practice principles have been established (OECD, 2021^[22]; 2023^[64]). Applied to the public acceptability of reforms, social listening would aim to assess the effectiveness of the case for reform and to better understand along which dimensions that case is helping build public support and conversely where it is less well received or more easily contested. In doing so, these efforts may also shed light on important questions that remain outside the framework of the PAT, including the degree of salience of the policy issue and reform proposal in the political and public debate, the use and effectiveness of normative vs. technical language in these debates and the impact that emotions may have on the relative importance of the different dimensions of public acceptability.

New or existing data tools can be used to collect relevant data and analyse the main “narratives” around specific reforms. In a number of OECD countries, social listening capabilities are already contributing to improve policymakers’ understanding of public views and inform their communication around key or sensitive issues (OECD, 2021, pp. 80-98^[22]; 2023, pp. 25-26^[64]). Existing data tools could support the application of the PAT through targeted forms of social listening and be directed towards one or more of its dimensions, as relevant for particular reforms and contexts. The PAT would in turn provide a framework for organising the data. It should be noted furthermore that narrative approaches have been used to better identify and characterise reform episodes in different policy areas, drawing on qualitative data and textual analysis.³²

Various methods (machine learning...) and resources (existing databases, web-scraped data...) can extend these approaches and develop a dedicated data tool to help monitor the public acceptability of specific reforms. Section 2.3.5 below provides an example of the application of such a tool to assess the response to the government’s case for reform in public and policy debates. This illustrative case study uses a tool developed in collaboration with the ISI Foundation³³ to provide a retrospective analysis of the policy and public debates around the recent French pension reform, focusing on news media articles and parliamentary texts. For more detail on this case study, see (Parazzoli et al., forthcoming^[72]).

2.3.5. What can social listening tell us about public acceptability? An application to the case of the 2023 pension reform in France

Background

Social listening opens new and potentially significant avenues for assessing the public acceptability of reforms through the analysis of non-standard data sources, including large public datasets and digital traces. Leveraging these data, which are often collected at scale and in real-time, could help complement traditional methods for assessing public acceptability, such as opinion surveys or focus groups, and provide policymakers with additional insights that can be used to improve the design and communication of reforms.

To test the potential contribution of social listening for understanding public acceptability and improving reforms, the OECD and ISI Foundation have explored (i) the possible insights that can be drawn from the analysis of two relevant sources of data: news media articles (as a proxy for public debate) and parliamentary speeches (as a proxy for policy debate); and (ii) the value of the PAT as a framework for organising these data, taking the 2023 pension reform in France as a retrospective case study.

Case study: The 2023 French Pension Reform

The French pension reform studied here (*Loi du 14 Avril 2023 de Financement Rectificative de la Sécurité Sociale pour 2023*) was passed in March 2023 and ratified in April 2023. The main elements of the reform included a gradual increase in the minimum legal retirement age (from 62 years to 64 years) and the bringing forward of an already planned extension of the necessary contribution period for a full pension (from 42 years to 43 years). For more detail on the 2023 French pension reform, see notably (Boulhol and Queisser (2023^[73]) and OECD (2023, pp. 15-57^[74]).

In addition to its timeliness, a number of reasons made this case highly relevant for analysis:

- i. *The significance and salience of pension reform:* The main elements of the 2023 French pension reform were in line with the trends observed and types of reform implemented in other countries in recent years, with the legal retirement age increasing in over half of OECD countries;
- ii. *The important role played by issues of public acceptability:* Despite being in line with the experience of other OECD countries, the 2023 French pension reform generated large-scale

- opposition, including strikes and 14 days of national protest by trade unions; and
- iii. *The 2023 pension reform came after several recent reform efforts in the same area:* This included two significant parametric reforms implemented in 2010 (*Loi Woerth*) and 2014 (*Loi Touraine*), as well as a proposal for systemic pension reform tabled in 2019 but withdrawn following the outbreak of the COVID-19 pandemic.

Furthermore, all four dimensions of the PAT featured prominently in the case for reform as well as in public debates around it:

- **Economic dimension:** One of the main stated objectives of the reform was to ensure the financial sustainability of the French pension system and eliminate its projected deficit by 2030. This objective was notably justified by the fact that total pension spending in France is among the highest in the OECD at around 14% of GDP (compared to 9% on average) and estimated to increase by 0.5% to 1% of GDP over the next decade according to projections by the French Pensions Advisory Council (*Conseil d'Orientation des Retraites*). Furthermore, pension system deficits could credibly be tied to broader concerns about growing public debt in the French case, as future gaps in pension revenue would likely have to be covered by government contributions or give rise to difficult renegotiations with the social partners.
- **Fairness dimension:** The reform was also presented as a means to ensure the continued viability of the current “pay-as-you-go” system and preserve the French model of intergenerational solidarity. Issues of intragenerational fairness were also considered, as the reform included an increase in the minimum contributory pension as part of a larger package designed to improve financial sustainability. However, the case for pension reform tends to be complex and therefore difficult to make on fairness grounds. For example, when looking at intergenerational fairness, in France people aged 65 and older tend on average to be relatively well off with a level of disposable income similar to the rest of the population (though it is projected to fall in the future) and a rate of old age poverty that is among the lowest in the OECD and below the rate of poverty for the general population. Issues related to intragenerational fairness, such as the effects of the reform on vulnerable groups (including women) and inequalities in life expectancy between occupations (as well as their impact on pension wealth) also featured prominently in debates around the reform.
- **Behavioural dimensions of Social Change:** Due to the complexity of pension systems and pension decisions, behavioural barriers tend to play an important role in the context of pension reform. As in most cases, this was taken into account to a degree in the design of the reform and the key measures of the 2023 French pension reform are to be implemented gradually to allow workers (particularly those close to retirement age) time to adjust. As previously mentioned, complexity and limited knowledge often mean that it is difficult to make the case for pension reform on fairness grounds. Figure 2.2 shows for example that public perceptions in France do not reflect the pension system’s actual performance in terms of protecting pensioners from economic risks, which would be a key element to consider in debates on intergenerational fairness.
- **Process dimension:** The 2023 French pension reform also presents an interesting case from the point of view of “process legitimacy”. First of all, the government could point to a clear electoral mandate for reform, as reforming the pension system was a central element in the programme of President Emmanuel Macron’s re-election campaign in 2022 and had already been signalled as a priority during his first term (2017-2022). Secondly, the 2023 pension reform was more limited in scope than a previous reform proposal tabled in December 2019 and suspended in March 2020 due to the outbreak of the COVID-19 pandemic. Finally, the 2023 pension reform was adopted through a special procedure (Article 49.3 of the French constitution) rather than through the ordinary legislative process. Article 49.3 allows the government to commit its responsibility and have a legislative proposal adopted without parliamentary approval but subject instead to a vote of no-confidence in the government (*motion de censure*).

Research design

Research focused on the analysis of (i) news articles published online by leading media outlets as the main data source for studying public debates; and (ii) parliamentary speeches as the main data source for studying policy debates. These data were compared to assess the salience of specific topics relevant to the reform in the news media and in parliamentary discourse. Media articles were obtained from public big data sources (the Global Database of Events – [GDELT](#)) and parliamentary speeches from the open data portal of the French National Assembly (*Assemblée Nationale* – i.e. the lower house of the French Parliament). Similar analysis could potentially also be conducted for other relevant data sources including social media and digital traces.

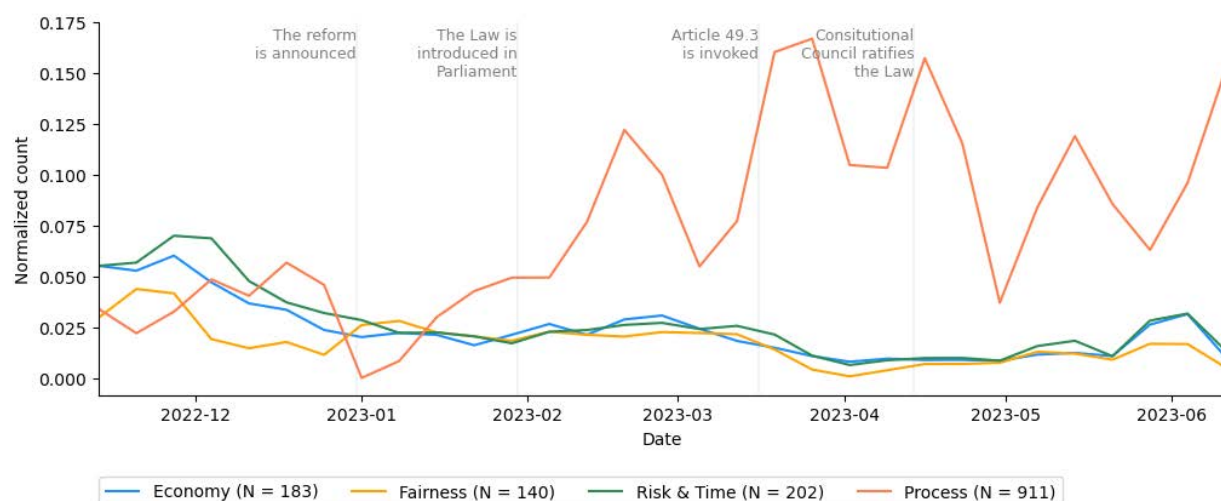
The analysis proceeded to identify news media articles related to each of the four dimensions of the PAT, based on a series of significant keywords and indicators that were defined by OECD experts and used to characterise relevance to each dimension. For the purpose of the analysis, keywords relating to the PAT's Behavioural Dimensions of Social Change were limited to a specific subset of dimensions relating to time and risk. Word and document embeddings were used to rank documents according to their similarity to each dimension and identify the most relevant ones (Mikolov et al., 2013^[75]). The aim in doing so was to explore the relative importance of the different dimensions of public acceptability in public debates. The working hypothesis, given the general characteristics of pension reform, was that issues related to “*process legitimacy*” were likely to dominate issues related to “*outcome legitimacy*”, notably in public debates. This reflects the fact that the complexity of pension reform makes it difficult to build a strong and convincing case on economic and fairness grounds.

In addition to the relative importance of the different dimensions, efforts were made to explore what further possible insights could be drawn by analysing the content of public and policy debates. These efforts focused on (i) the salience and framing of the topics that dominated discussions around the reform, and (ii) the degree to which they may align or differ between public debates and policy debates. In order to do so, the sets of documents relating to the different dimensions of the PAT were analysed using topic modelling, a type of statistical modelling that employs unsupervised machine learning to identify clusters of similar words within a body of text.³⁴ The relevant sets of documents for each dimension of the PAT were then compared across the two different sources of data – news media articles and parliamentary speeches – to assess the degree to which they aligned or not in terms of the main topics they covered.³⁵

Results

Figure 2.10 shows the evolution over time of the **volume of media articles related to each of the four dimensions of the PAT**, aggregated at a weekly level and normalised over the total of articles published each week for the period between 1st November 2022 and 15th June 2023. This analysis tends to confirm the working hypothesis: elements relating to the Process Dimension are dominant in news media coverage of the reform and the focus on these elements increases once the law was introduced in the National Assembly. Conversely, focus shifts away from elements relating to the Economic Dimension and the Risk and Time Dimension, which were initially the most covered.

Figure 2.10. Weekly media articles relating to the different dimensions of the PAT

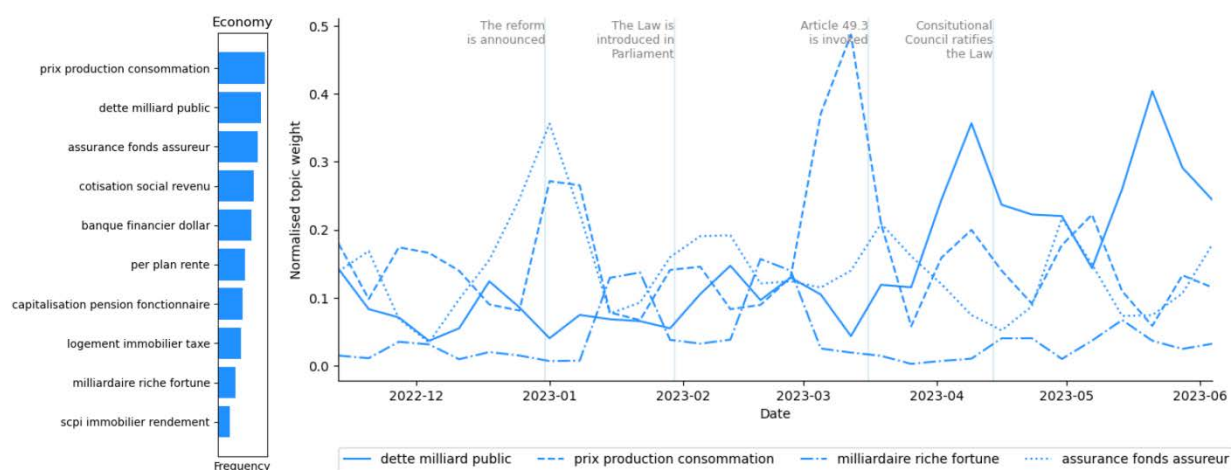


Note: Weekly number of documents classified as belonging to each dimension of public acceptability in news media articles from major French media outlets over the period 1st November 2022 to 15th June 2023. Articles are taken from 10 selected media sources: *Le Monde*, *Libération*, *L'Equipe*, *Le Figaro*, *Les Echos*, *La Tribune*, *L'Humanité*, *La Croix*, *Le Point*, and *Le Parisien*. The values are normalised over total documents published each week

Source: Parazzoli et al. (forthcoming^[72]), "Taking the Pulse of Reform: What can a multi-channel analysis of media and parliamentary speeches tell us about public acceptability?"

Turning to the **content of news media articles**, the main topics specific to each dimension were identified. Figure 2.11 presents the results of this analysis for the Economic Dimension, showing the surfaced topics and their frequency (on the left), as well as their evolution over time (on the right). The topics are represented by the three most relevant words related to them – i.e. the so-called "topic descriptors". The results indicate the salience of the issue of public debt – one of the main objectives of the reform and a key element in its rationale – in news media coverage. Other relevant topics include discussions about inflation, housing, private insurance, and billionaires. Furthermore, the evolution in the coverage of different topics can provide an indication of how the focus of public debate responded to external events and key moments in the legislative process.

Figure 2.11. Media coverage of selected topics for the Economic Dimension of public acceptability

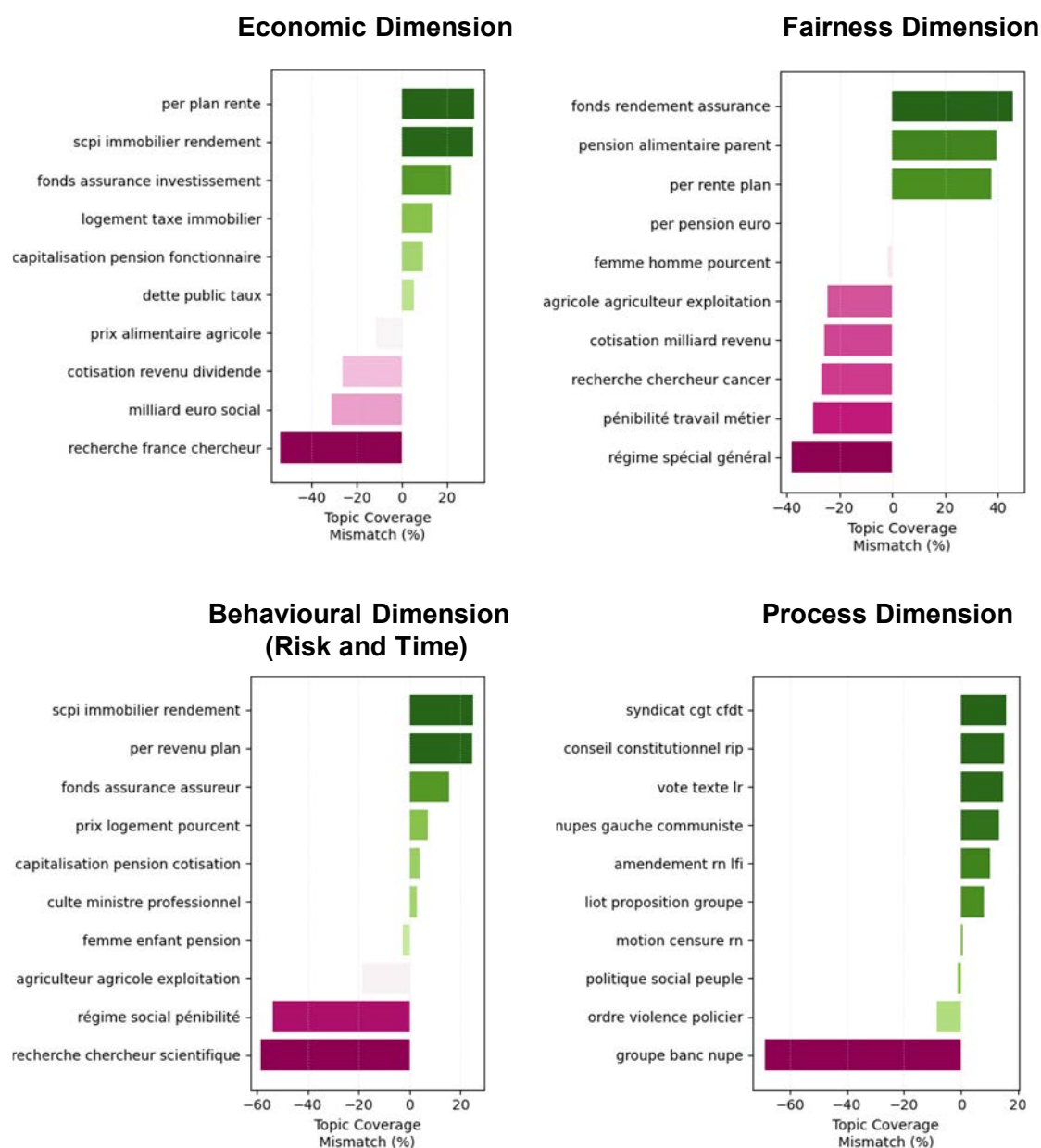


Source: Parazzoli et al. (forthcoming^[72]), "Taking the Pulse of Reform: What can a multi-channel analysis of media and parliamentary speeches tell us about public acceptability?"

Finally, the analysis sought to **compare the content of news media articles and of parliamentary speeches** to identify meaningful analogies and differences. Figure 2.12 shows differences in coverage between media articles and parliamentary speeches for all four dimensions of the PAT. Topics on the left (purple) were more discussed in parliamentary speeches, while those on the right (green) were more discussed in media articles. The analysis across the different dimensions indicates, for instance, that reference to academic research was more common in parliamentary speeches, while topics relating to individual pension decisions – such as pension contributions (*cotisation*), pension saving plans (*Plan d'Épargne Retraite* or *PER*) and common pension investment instruments (*Société Civile de Placement Immobilier* or *SCPI*) – featured more prominently in the news media. This may suggest that, while research and expert opinion feed directly into policy debates (notably through parliamentary hearings and reports commissioned by the government or other state institutions), they may have much less impact on public debates.

As a result, the practical and individual-level effects of the pension reform may have received more attention and carried more weight in the public debate (as proxied by news media), while aggregate-level considerations and important issues such as the role of social policy featured less prominently than in policy debates. Interestingly also, looking at the *Fairness Dimension*, the impact of the reform on women was discussed comparatively more in the news media than in parliament. Taking account of these types of “mismatches” may yield insights that can help strengthen the case for reform by better addressing citizens’ demands and concerns and thereby increase public support for reform. It also highlights the potential benefits that can be drawn from the analysis of non-standard data that are public and collected in real-time.

Figure 2.12. Comparison of the coverage of topics in news articles and parliamentary speeches



Note: Bars leaning on the left (in purple) indicate that the topic was more discussed in parliamentary speeches, while those on the right (green) indicate that the topic was more discussed in media.

Source: Parazzoli et al. (forthcoming^[72]), "Taking the Pulse of Reform: What can a multi-channel analysis of media and parliamentary speeches tell us about public acceptability?"

2.4. Possible next steps for this work

The PAT provides flexibility in its use. It can be applied and operationalised in several ways, according to policymakers' needs. The *general framework* presented in Section 2.2 covers the main dimensions of reform that matter to people and contribute to public acceptability across reform areas and across country settings. It is set at a high enough level to be used or customised by different governments for different types of reform. As such, it could potentially form part of a digital hub on reform that countries can access to carry out preliminary analysis on public acceptability based on the available data. This digital hub would be supported by the setting up of an *OECD Perceptions Database*, as proposed in Chapter 1. Furthermore, a complementary *toolkit* could be developed to help governments operationalise the insights on public acceptability provided by the general framework and design reforms that are adapted to their own national contexts and circumstances. Elements of this potential toolkit are presented in Section 2.3.

More specifically, the following applications of the PAT could be considered:

- **First, specific implementation of the PAT could be undertaken as part of a concrete reform episode**, in collaboration with interested countries. In this context, the general framework and toolkit would support policymakers by helping them assess the conditions for public acceptability and drawing relevant insights from the available data to improve the design, implementation and communication of necessary reforms. These case studies would provide a test of how operational the PAT is in an applied context; how it can be adapted to specific reform areas and national settings; and how suitable indicators can be developed.
- **Second, the general framework could be integrated into OECD analysis on the political economy of reform** to take better account of public acceptability in policy advice and recommendations. Here, the framework could be applied in a sectoral context (for example, to support the analysis of pension reform in the *OECD Pensions at a Glance* reports or the analysis of labour-market reform in the *OECD Employment Outlook...*) or integrated more fully into the economic surveillance conducted in *OECD Economic Surveys* or *Going for Growth* reports.
- **Third, retrospective applications of the framework could be made to past reform episodes.** Doing so would provide an opportunity to (i) draw additional insights from these episodes relating to public acceptability, in line with the work done in *Making Reform Happen*; and (ii) test the validity of the framework.

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Annex 2.A. Prototype for a Reformers' Checklist

Examples of relevant questions to include in a general checklist

1st step: Assessing outcome legitimacy – To what extent does the case for reform clearly articulate the equity and efficiency implications of reform for the public?

Purpose of reform

- *What is the intended purpose of reform?* (Economic grounds; Fairness grounds; Political grounds)
 - Is that purpose clearly established and understood by policymakers?
 - Is there a shared consensus across government on the purpose and objective of reform?
- *Is it in line with the way in which the public tends to frame and assess this type of reform?*
 - Has analysis been conducted to understand how the public perceives the purpose of reform (through desk research, surveys or expert opinion/interviews)?
- *How well is the purpose of reform communicated to the public?*
 - Is the intended purpose of reform coherently reflected in communication campaigns?
 - Are good practices and OECD guidelines in terms of public communication being followed?
 - Has the public's reception of the case for reform been explored through surveys, focus groups or other methods (social listening...)?

Prospects for reform

- *Do policymakers clearly understand the economic and distributional impacts of reform?*
 - What models and tools are in place to assess the economic and distributional impacts of a proposed reform (micro-simulation models, Distributional Impact Assessments...)? Where relevant, are they aligned with good practices?
 - Has the performance of the existing policy setting been properly assessed or benchmarked? Has the economic impact of reform been properly assessed?
 - Has the distributional impact of the existing policy setting and proposed reform been assessed?
 - Does the assessment indicate that:
 - A majority of the population is expected to benefit from reform (*Economic dimension*)?
 - The reform is expected to reduce inequality overall or for the key groups affected (*Fairness dimension*)?
- *Does the case for reform take account of the public's views on the need for reform?*
 - How well aligned is the case for reform with the public's understanding of:
 - The need for reform?
 - The likely impacts of reform on both grounds (i.e. how difficult is reform likely to be)?
 - What relevant perception gaps have been identified?
 - Have communication campaigns sought to address the key perception gaps identified? How effective have they been in shifting the relevant perceptions and attitudes?

Key challenges for reform and means for addressing them

- *Does the reform strategy seek to improve the prospects for reform?*
 - Have the economic impacts of reform been effectively communicated to the public? Have the results of Distributional Impact Assessments been effectively communicated to the public?
 - Have communication campaigns sought to address key perception gaps? How effective have they been in shifting the relevant attitudes and perceptions?
 - What more can be done to demonstrate the need for reform and/or the desirability of the expected outcomes?
- *Does the case for reform take account of the main sector-specific challenges relating to equity and efficiency?*
 - Have the main challenges been identified, based on analysis of the literature, consultation with key interest groups and expert advice?
 - Have trade-offs between equity and efficiency been clearly presented as part of the case for reform?

2nd step: Taking account of the behavioural dimensions of social change – What behavioural barriers may undermine support for reform?

State of Knowledge

- Can the public's level of knowledge and openness to information be assessed? Have the implications been taken into account when designing communication around the reform?
- How well does the public understand the underlying policy issue? / How well do people feel they understand the policy issue?
- How likely is the public to engage with quantitative evidence? Is this reflected in the type of information and modes of communication used to build public support for reform?
- Do salient analogies exist with successful reforms in other areas?

Uncertainty

- What sources of uncertainty may affect public support for reform?
- Who do people perceive to be the main “winners” and “losers” of reform?
- How well do these perceptions align with the expected “winners” and “losers”?

Margins to adapt

- Have the broader behavioural costs been identified and considered when designing and implementing reforms?
- What behavioural adjustments are demanded by reform? Have groups with limited margins to adapt been identified?
- Have appropriate support, compensation or transition measures been put in place? Is the public sufficiently aware of these accompanying measures?

Area-specific challenges

- *What additional behavioural traits need to be considered in this specific reform area?*
 - Example of pension reform: Forms of time inconsistency (hyperbolic discounting, myopia...), information avoidance, attitudes towards risk and endowment effects...
- *Have the implications of these behavioural traits for the design and communication of reform been taken into account?*

- Example of pension reform: Use of non-standard direct cash transfers (one-off lump-sum payments...) in the case of *myopia*; use of alternative modes of communication or choice architecture in the case of *limited public knowledge*, *low openness to information* or *high complexity of the issue*...
- *Are behavioural barriers addressed through ethical means?*
 - Have OECD guidelines and good practice principles been applied to ensure the ethical nature of interventions throughout the reform process?

3rd step: What elements of process are needed to support the case for reform?

Preliminary structural question

- *How prominently is process legitimacy likely to feature in the case for reform?*
 - In light of potential difficulties in building public support on grounds of content alone (prospects for reform; behavioural barriers)?
 - In light of past experience in this specific reform area?

Administrative and technical Capacity

- *Is there appropriate administrative and technical capacity in place to deliver on reform objectives?*
 - Have capacity needs been assessed and integrated at all stages of the reform process?
 - Are institutions in place that can manage the reform effectively or is there a need to create or strengthen such institutions?
- *Has the role of administrative capacity in building public support been taken into account (i.e. its role in addressing key challenges identified under previous steps of the checklist)?*
 - Does limited capacity create sources of uncertainty that may undermine support for reform?
 - Is additional capacity needed to help people adapt to reform and facilitate social change?

Evidence base

- *How reliable is the evidence base supporting the case for reform?*
 - Are there reliable indicators or estimates for the key outcomes impacted by reform? Are there estimates or counterfactuals for these outcomes in the absence of reform?
 - What relevant perceptual and behavioural data are available to understand public views of the policy issue? Where are the main gaps?
- *How well is the evidence used?*
 - To what extent has the design of reform been informed by the evidence?
 - How well has the evidence been communicated to the public? Has focus been put on ensuring that the messaging is coherent and effective, in line with existing good practices?
 - Are there trusted information providers that can communicate the evidence to the public?
 - Can limited public knowledge, uncertainty and gaps in trust limit the effectiveness of the evidence in making the case for reform? What type of information can help overcome these behavioural barriers?

Political Conditions

- *Have the key political conditions for reform been satisfied?*
 - Is there an electoral mandate for reform and is it clearly perceived by the public?
 - Does the reform have clearly identifiable “owners” and how are they perceived by the public?
 - How united and cohesive is government in support of reform?
- *Is the expected timeframe for design, adoption and implementation of reform realistic?*
 - Does the timeframe for reform take account of electoral horizons?
 - Does the timeframe for reform allow sufficient time for effective communication and consultation, in light of the challenges identified?

Stakeholder engagement

- *How effective and inclusive has consultation with key stakeholders been?*
 - Have OECD guidelines and good practices on stakeholder engagement been applied?
 - Is there a strategy for engaging with the constituencies threatened by reform?
 - Have efforts been made to engage with and mobilise constituencies in favour of reform?
- *Has the role of stakeholder engagement in building public support been taken into account?*
 - Can consultation help address challenges related to uncertainty about reform or identify ways to facilitate adaptation when margins are limited?

Notes

¹ This is notably done through the [Economic Policy Reforms: Going for Growth](#) series of flagship reports, which focus on structural reforms.

² For a discussion on the complementarity between quantitative and qualitative analysis of the political economy of reform and the benefits of combining them, see Tompson (2009, pp. 15-23^[17]).

³ These recommendations are in line with similar analyses by the European Commission (Aphecetche et al., 2022^[76]) and the International Monetary Fund (Ciminelli et al., 2019^[68]).

⁴ This conclusion was notably underlined at the 2019 OECD conference on *The Changing Political Economy of Reform* which took stock of new challenges and areas for research on the political economy of reform ten years after *Making Reform Happen*. The proposal to create the *OECD Expert Group on New Measures of the Public Acceptability of Reforms* to explore possible responses to these new challenges was a major outcome of this conference.

⁵ The multidimensional framework developed in Stokes (1996^[77]) provides an interesting example of this type of approach. This framework extends traditional “economic voting” models by including a broader range of motivations that can explain public responses to reforms, beyond individual self-interest and expected payoffs. In order to do so, Stokes (1996^[77]) identifies a series of key grounds through which citizens assess the economic effects of reforms, based on a review of the literature on economic voting and on the study of selected cases of structural reforms in Latin America and Eastern Europe in the 1980s-1990s. In addition to the economic and distributional impacts of reform, this broader approach highlights two additional elements: (i) the impact of reform on public expectations of future economic performance (i.e. how citizens perceive the outcomes of reform and whether a reform is “working” or not); and (ii) the

impact of reform on public attitudes towards government (i.e. how and to what extent citizens attribute responsibility for the outcomes of reform). On this basis, the framework developed in (Stokes, 1996^[77]) distinguishes 4 main dimensions that contribute to shape the public acceptability of reforms: (i) economic impacts; (ii) distributional impacts; (iii) intertemporal arbitrage; and (iv) government responsibility.

⁶ See for example Alesina and Drazen (1991^[78]), Drazen (2000^[40]), Persson and Tabellini (2000^[41]), Alesina, Ardagna and Trebbi (2006^[79]) for classical formulations of this challenge.

⁷ This conclusion is also echoed in the sectoral guidance provided by *Making Reform Happen* in different policy areas, including for example labour market reform (OECD, 2010, pp. 56-57^[18]) and tax reform (OECD, 2010, p. 103^[18]).

⁸ A broad definition of “behavioural dimensions” is needed here as barriers to behavioural change may often be informational or cognitive in nature. When assessing the public acceptability of a reform, understanding how citizens view the underlying policy issue can help determine how receptive they will be to arguments on efficiency and equity grounds and how effective the case for reform is likely to be. Similarly, citizens’ capacity to make choices in a new environment or adapt effectively to new incentives and rules will depend in part on levels of public understanding and on whether or not they have access to tractable and actionable information as well as effective support.

⁹ Tompson (2009^[17]) for example provides both quantitative evidence (through cross-country econometric analysis) and qualitative evidence (through case studies) of the importance of institutional and political factors linked to process in the successful implementation of reforms.

¹⁰ Under the basic assumption of economic voting, this constitutes the only dimension that matters for public acceptability. Even here, however, policy preferences and the relevant economic variables through which economic performance is assessed are likely to vary across different groups. See for example Bojar and Vlandas (2021^[80]) for evidence on group heterogeneity in terms of policy preferences and key variables used to assess perceived economic performance.

¹¹ This point is in line with the Expert Group’s recommendation to focus on *People’s understanding and evaluation of the “state of society”* as a key factor to measure (see Section 1.3.1 of the previous chapter for further detail).

¹² This point is in line with the Expert Group’s recommendation to focus on *Policymakers’ perceptions of public attitudes* as a key factor to measure (see Section 1.3.1 of the previous chapter for further detail).

¹³ This point is also in line with the Expert Group’s recommendation to focus on *Policymakers’ perceptions of public attitudes* as a key factor to measure (see Section 1.3.1 of the previous chapter for further detail).

¹⁴ This may include, for example, reforms for which the stated objective is to maintain social stability. Conversely, reforms that were originally intended to address economic or fairness goals may instead be perceived as being motivated by electoral concerns and political signalling, notably if the case for reform is not clearly and convincingly made to the public or is effectively undermined by opponents. This latter case further underlines the relevance of assessing whether public perceptions of the purpose of reform are aligned with the purpose around which policymakers are framing the case for reform.

¹⁵ Mus, Mercier and Chevallier (2023^[81]) tests the implications of mental accounting for public policy and provides evidence that “matched earmarking” can help increase public support for carbon taxation by

clearly linking carbon tax revenue to spending on green projects. These results are replicated for health-related earmarking of tobacco tax revenue (another consumer tax) and social-related earmarking of inheritance tax revenue (a non-consumer tax).

¹⁶ As exemplified for instance by the use of matching donations in philanthropy.

¹⁷ On the issue of information avoidance, see Golman, Hagmann and Loewenstein (2017^[82]). For evidence on knowledge gaps and misperceptions relating to the tax system, see notably Stantcheva (2021^[34]) which uses large-scale surveys to study the public's understanding of income tax and inheritance tax in the US. Results show that US respondents significantly over-estimate the share of households that pay the top income tax rate (an estimated 20% on average against an actual share of less than 1%) and underestimate the share of households that pay no income tax (an estimated 25% against an actual share of 44%). They also overestimate the share of households that pay the estate tax by several orders of magnitude (an estimated 36% on average against an actual share of less than 0.1%).

¹⁸ On good practices in the area of public communication, see (OECD, 2021^[22]; 2023^[64]). On good practices in the communication of pension information, see for example Atkinson et al. (2012^[90]). See also the case of Slovenia, which uses a staged approach involving (i) communicating the problem; (ii) communicating solutions to the problem; and (iii) communicating entitlements (OECD, 2022^[89]).

¹⁹ See Stantcheva (2021^[34]) and Dechezleprêtre et al. (2022^[5]) on the impact of messaging on support for tax and environmental policies respectively. See also Duch and Torres (2023^[58]) on the provision of audit information and its impact on beliefs about corruption and integrity at the municipal level in Chile.

²⁰ For example, populations with limited alternative mobility or consumption options in the case of environmental taxes; or workers close to retirement age in the case of pension reform. Dechezleprêtre et al. (2022, p. 8^[5]) captures this idea well: “*Opposition to climate policies is strongly correlated with lower availability of public transportation, more reliance on cars, and, to a lesser extent, higher gas expenses*”.

²¹ See for example Flipo (2021^[83]) and Martin and Islar (2021^[84]) on the case of the Gilets Jaunes in France. In public debates on environmental taxes, this idea of unfair differentiated treatment based on the capacity to adapt is typically expressed by the argument that “*the poor change their behaviour and the rich just pay the tax*”.

²² Focus on administrative and technical capacity should not be limited to the implementation stage. Before implementation, the assessment of capacity has an important role to play in informing the design of reforms, notably by identifying the potential “winners” and “losers” from reform, ensuring reform objectives are aligned with available means of implementation, and determining whether compensation measures can be delivered effectively. Following implementation, evaluation of the impacts of reform (including public satisfaction) and communication of the results of evaluation can help ensure that capacity remains adapted and public support for the reform is maintained.

²³ The European Commission's 2022 [Communication on Better Assessing the Distributional Impact of Member-states' Policies](#) offers an interesting example through the guidance and support it provides on the use of ex-ante Distributional Impact Assessments to assist in the design of reforms.

²⁴ Independent fiscal, productivity and regulatory institutions can help address challenges linked to uncertainty and limited public understanding of policy issues, for instance by providing trusted and authoritative evaluations of the impact of tax reforms (see p.19). The *Netherlands Bureau for Economic*

Policy Analysis (CPB) and the *Australian Productivity Commission* (APC) were highlighted as good examples of such trusted institutions in (OECD, 2010, pp. 32-33^[18]).

²⁵ For example, better indicators on the quality of public spending were highlighted as one possible way to help overcome limited willingness to pay in the context of tax and benefits reforms (see Box 2.5).

²⁶ Some evidence exists linking trust in government and institutions with support for reform (OECD, 2024^[23]), including in the area of social policy (Garritzmann, Neimanns and Busemeyer, 2023^[85]).

²⁷ Including those of constituencies that are impacted by reform, but whose interests may not be well represented in the public debate – such as youth and future workers in the case of pension reform.

²⁸ It should be noted that the prototype described in Annex 2.A represents a general and comprehensive checklist designed to fully cover the different dimensions of the PAT across reform areas. Implementing this ideal checklist may require access to an extensive range of both objective and perceptual/behavioural data, some of which may be lacking or costly to collect. In practice, however, shorter and more targeted versions of this general checklist can be drawn up for specific reform areas and contexts, based notably on the identification of key challenges and prioritisation of the different dimensions provided by the sectoral roadmaps (see following section). These efforts would be further supported by the establishment of an *OECD Perceptions Database*, as suggested in Section 1.4, to compile key perceptual and behavioural data and help address the main data gaps.

²⁹ This standardised checklist is designed to help policymakers ensure that ethical considerations are integrated into the application of behavioural science at all stages of the policy process and includes a series of prompting questions to accompany and guide the use of the checklist.

³⁰ For example, the outsized importance of process dimensions in the case of pension reform highlighted by the Expert Group can be explained by a common failure to establish a sufficiently strong and popular case on equity and efficiency grounds due to the difficulties associated with the informational/behavioural aspects of the issue (complexity of pension systems; limited technical understanding; information avoidance...). As a result, pension reform may end up relying entirely on process legitimacy unless these challenges are better addressed. This would also imply limited opportunities for building outcome legitimacy and creating buy-in and support for the actual economic and distributive outcomes of pension reform.

³¹ These “*reform-making*” and “*reform-breaking*” data would be used to complement simpler traditional measures of public acceptability, such as polling measures of support for reform or focus group results from key constituencies. They present the advantage of providing a finer picture of the elements that contribute to the public acceptability of a reform and may give a clearer and earlier indication of why the case for a particular reform is likely to succeed or fail and on what grounds.

³² See for example Duval et al. (2018^[87]) and Aumond, Di Tommaso and Rünstler (2022^[86]).

³³ The ISI Foundation (*Istituto per l’Interscambio Scientifico*) is a research institution that is based in Turin, Italy. It specialises in the application of data science and computational modelling to issues of environmental sustainability, social inclusion and public health. For more information on the ISI Foundation and its work, see: <https://www.isi.it/>.

³⁴ Non-negative matrix factorisation (NMF) was used for this task (Paatero and Tapper, 1994_[88]). To avoid issues with low topic coherence and poor usability of information, the analysis focused on extracting a smaller number of topics – specifically, 10 topics from each corpus.

³⁵ Coupled matrix factorisation with non-negativity constraints was applied to compare news media articles and parliamentary speeches on the same dimension of the PAT. This technique enables the analysis of two distinct bodies of text or “corpora” by searching for latent topics in two collections of documents simultaneously. Through this analysis, a set of common topics is identified across the two sets of documents. Mismatches between them in terms of coverage can then be detected by assessing the presence of these common topics in each corpus.

Getting the Public on Side

How to Make Reforms Acceptable by Design

Public acceptability is a crucial condition for the successful implementation of reforms. The challenges raised by the green, digital and demographic transitions call for urgent and ambitious policy action. Despite this, governments often struggle to build sufficiently broad public support for the reforms needed to promote change. Better information and effective public communication have a key role to play. But policymakers cannot get the public to choose the side of reform without a proper understanding of people's views and how they can help strengthen the policy process.

Perceptual and behavioural data provide an important source of insights on the perceptions, attitudes and preferences that constitute the "demand-side" of reform. The interdisciplinary *OECD Expert Group on New Measures of the Public Acceptability of Reforms* was set up in 2021 to take stock of these insights and explore their potential for improving policy. This report reflects the outcomes of the Expert Group's work. It looks at and assesses (i) the available data and what they can tell policymakers about people's views; (ii) the analytical frameworks through which these data are interpreted; and (iii) the policy tools through which considerations of public acceptability are integrated into the reform process.



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