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The Shark Jaw and the Elevator: Arguing the Case for the Necessity, Harmlessness and Fairness of the Norwegian Pension Reform

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Based on the retrenchment literature, Norway is an unlikely candidate for comprehensive pension reform because of its unique economic situation, with a steadily growing petroleum fund and substantial tax revenues flowing into the public coffers. Thus, politicians should encounter difficulty convincing the electorate and strong interest groups of the need for reform. Nevertheless, reform did occur in Norway, and reform justifications faced surprisingly brief and light opposition. This article investigates the policy discourses applied and argues that two images of justification in the Norwegian pension reform process partially explain how resistance to the reform was overcome. The first image is a type of crisis scenario that is neatly caged in the 'shark jaw' image. The shark jaw can be visualised in a graphic illustration in which projected future petroleum revenues and pension expenses are displayed simultaneously. The lines for the two indicators extend in opposite directions, forming an image resembling a jaw. The second image frames the actual reform as an improvement; this view illustrates how the reform allows one to enter an 'elevator' that moves one upwards, presenting a stark contrast to the substance of retrenchment. The article is informed by Schmidt's discursive-institutionalism perspective and her distinction between coordinative and communicative discourses. Empirically, the article relies on a comprehensive collection of materials, including document analysis, parliamentary debates, interviews, media searches and opinion surveys.

Introduction

Based on the retrenchment literature (e.g., Pierson 1994; 2001), Norway is an unlikely candidate for a major structural and path-breaking pension reform because of its unique economic situation, with a steadily growing petroleum fund and substantial streams of tax revenues flowing into the public coffers. In the last ten years before the pension reform was (fully)

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implemented in 2011, the unemployment rate in Norway never exceeded 4.5 percent, and was well below this most of the time (Eurostat 2014). In the same period, the Government Pension Fund Global, exceptional for Norway and set up to help finance future economic challenges, grew from 609 billion NOK in 2002 to 3.312 billion NOK in 2011 (Government Pension Fund Global 2014). Thus, politicians should encounter difficulty convincing the electorate and strong interest groups of the need for reform. Nevertheless, the reform did occur, and reform justifications met with surprisingly light and brief opposition. The Norwegian case thus questions the general proposition that retrenchment is highly unlikely in situations where there is no acute economic crisis and where the existing policy programme enjoys broad and popular legitimacy. Which policy discourses did the main actors use to persuade potential opponents to accept comprehensive change? The objectives of this article are to increase our understanding of the paradoxical reform of a welfare state with a strong resources foundation and to contribute to the debate on when retrenchment occurs.

We argue that two images of justification and presentation in the Norwegian pension reform process partially explain how resistance to the reform was overcome. More specifically, we discuss how reform advocates relied on two contrasting images in different phases of the pension reform process. The first image, which was applied to create an understanding of the *need* to reform, is a type of crisis scenario that is neatly cached in the shark jaw image. This image can be observed in a graphic illustration in which projected future petroleum revenues and pension expenses are displayed simultaneously. The lines for the two indicators extend in opposite directions, forming an image resembling a jaw. The message was that future petroleum revenues would gradually be reduced and ultimately unable to meet the increasing financial needs of future pensions. The other image frames the actual reform as an *improvement*; this view is represented by an elevator. This image represents a policy discourse of progress in terms of how the reform allows one to enter an elevator that moves one upwards, starkly contrasting and contradicting the substance of retrenchment, in which benefits and replacement levels bring one downward. The meaning of the elevator metaphor is that future pensions will secure a high standard of living even when public pensions (the elevator) do not transport one to the top floor.

These two images are identified by main actors, both advocates and critics, in our analysis. However, the images of the shark jaw and the elevator are used here as pointers and headings for broader policy discourses containing other important images, elements and indicators. Theoretically, we rely on the discursive-institutionalism perspective of Schmidt (2000; 2008; 2011) and her distinction between coordinative and communicative discourses as part of the broader literature emphasising the framing of reforms and the role of ideas and discourse (cf., e.g., Campbell

2002; Béland & Cox 2011, Mehta 2011). Moreover, we discuss the classical retrenchment literature emphasising the difficulty of making major reforms and, hence, the need for blame avoidance and blame sharing (Pierson 1994; 2001). Empirically, this article is informed by document analysis, parliamentary debates, interviews, an exploratory media analysis and survey data. It focuses on the main actors in the pension process, often illustrating various points by reference to former Prime Minister Jens Stoltenberg, who appointed the pension commission (2001–4) making reform recommendations.¹

The article is organised as follows. The first section, which begins with a review of the dominant retrenchment literature, clarifies how Schmidt's theoretical account can add to the understanding of pension reforms. The second section presents the methods and sources applied in the analysis. The ensuing three sections answer the key research question of how to overcome reform resistance. An account is presented of how the shark jaw metaphor developed and how it came to dominate the outlook of key policy actors. The section after that, discussing the consensus and disappearing dissenters, precedes an analysis of the framing of the reform proposal using the elevator metaphor. The penultimate section discusses the use of opinion surveys to determine how the population has responded to changes, and the final section presents our conclusions.

Theory

As argued in the introduction, based on the dominating retrenchment literature (e.g., Pierson 1994; 2001), it is a paradox that major structural reform occurs in a country that enjoys such a unique economic situation as Norway. Moreover, Norway is an interesting case to explore as the social policy literature usually focus upon Sweden and/or Denmark when discussing Nordic countries, implying that less is known about developments in Norway. Our analysis is thus of empirical value to both the more general social policy and to retrenchment literature.

Pierson (1994) claims that retrenchment is difficult because of the ways in which people oppose cutbacks. When possible, politicians avoid retrenchment, or at least try to hide cutbacks. In Norway, almost all parties represented in parliament (the Labour Party (Ap), the Conservatives Party (H), the Christian People's Party (Krf), the Centre Party (Sp), and the Liberal Party (V)) participated in two pension settlements in 2005 (all but the Socialist Left Party (SV) and the right-wing Progress Party (Frp)) and 2007 (all but Frp). Importantly, the 2005 settlement was reached before the parliamentary election later the same year. However, even though party competition on this matter eventually was restricted, important actors outside the parliament still had to be convinced.

Schmidt (2000) observes many reforms that contradict the claims of the retrenchment literature. She raises interesting research questions that our analysis contributes to answering:

The most interesting question to explain, then, is how governments actually managed to overcome narrow self-interest enough to persuade electoral majorities and even the most affected interests of the merits of a new policy program. (Schmidt 2000, 230)²

Schmidt's work provides a helpful framework for our analysis of the Norwegian pension reform process. Political communication and discourse are central to her study. She understands a policy discourse as providing 'the cognitive definitions of the problem and the cause-and-effect relationships defining effective solutions' as well as 'the normative content of arguments proposed to justify unpopular policy initiatives' (Schmidt 2000, 230). Reformers must convincingly argue that change is both necessary and appropriate. Furthermore, it is crucial to change 'the underlying definition of moral appropriateness' if one is to be able to conduct unpopular welfare reforms (Schmidt 2000, 231). The importance of a legitimising discourse will inform our analysis.

Schmidt (2000, 232; 2008, 310) distinguishes between communicative and coordinative discourse. The former is developed to convince the general public, whereas the latter is intended to convince the elite. Although Norway has characteristics associated with multi-actor systems in which coordinative discourse is prominent (cf Schmidt 2000, 233), we regard these discourses as two phases of a legitimising discourse in which it is important, first, to convince the political elites of the reform and, second, to communicate this message to voters. This is different from Schmidt's own approach in which reforms in a comparative perspective are explained by reference to either a successful coordinative or communicative discourse. We intend to show how the application of Schmidt's analytical distinction between discourses can be used to distinguish between various phases of the reform process within a country, as well as serving as categories to compare countries that belong to majoritarian or multi-actor systems. We use Schmidt's work both as a theoretical framework and as an analytical tool.

Schmidt (2000) claims that the extent to which a legitimising discourse is convincing helps explain whether countries are able to conduct unpopular reforms. Discourse may demolish opposition. In the subsequent analysis, we argue that Schmidt's theoretical framework sheds light on how the main actors in the Norwegian pension reform process were able to sell what one journalist called 'an unmarketable commodity' (Aabø 2005) and to introduce a comprehensive pension reform with clear elements of retrenchment.

The pension reform consists of four main elements: a new notional defined contribution-inspired system for the accrual of pension rights; an actuarially 'neutral' flexible retirement age between 62 and 75;

the introduction of an automatic longevity adjustment factor (*levealdersjustering*); and a less than full wage indexation of pension benefits (Pedersen 2011, 8). These changes are estimated to reduce future pension expenditures from 15 to 12 percent of gross domestic product (GDP) in 2050. The most important retrenchment element – the longevity adjustment factor – is expected to reduce pension benefits by 20 percent for cohorts retiring around 2050.

Methods and Data

In assessing how actors framed the problem and attempted to sell the reform, we primarily rely on qualitative methods and sources, including semi-structured interviews with key policy actors such as politicians, public servants and interest organisation representatives. A total of 11 interviews were conducted in the period June–August 2013, with 13 interviewees (see Appendix 1 for a list of interviewees). For the purpose of this article, the interviews primarily serve as a source for covering the coordinative discourse between leading representatives of the central stakeholders of the reform process. However, we also asked these interviewees questions about activities and strategies with regard to communicating the reform to the broader public. In choosing what we denote as key actors for the interviews we deliberately sought to include representatives of potential veto players that were known to have a critical stance towards the reform initiative. To identify powerful actors with a critical outlook on the need to reform and alternative ideas of policy solutions we consulted the hearing statements on the pension commission report (NOU 2004: 1). Not surprisingly some of the most critical statements came from labour unions. Representatives from some of these union confederations were members of the pension council, associated with the commission, but not fully integrated. By including these representatives, as well as other members of the pension commission and the council that were genuinely positive towards the need for reform, we have ensured a balance between key actors interviewed. Moreover, it enabled us to scrutinise the battle of ideas, focusing on two central roles that ideas play in politics: as problem definitions and as policy solutions (cf Mehta 2011, 27–35).

We also scrutinised two main parliamentary debates in 2005 and 2007 and policy documents covering both green and white papers. The views of opposition and position parties are available in parliamentary debates. Interviews and parliamentary debates thus complement each other. Interviewing policy makers after the fact may be challenging due to rationalisation, but this problem is reduced by combining data sources – for example, using both interviews and debates, and relying on early hearing statements to check changes in opinion and argumentation.

Our assessment is complemented by an exploratory, quantitative media search study using a search archive service (ATEKST Retriever, <http://web.retriever-info.com/services/archive.html>). The method used allowed us to identify the extent to which some keywords and concepts found in public documents have entered the broader public debate and are viewed as part of the communicative discourse; the method also allowed us to identify the extent to which those keywords and concepts remain within a more narrow community of pension specialists and are thus part of the coordinative discourse. Together with survey data (see below), this method provides further insights into how the receiving end of the communicative discourse reacts to signals from the major reform architects.

A problem that arises when providing only a quantitative overview is that all counts are treated equally. This problem implies that important qualitative aspects of information are overlooked (i.e., who says what in which forum?). We have focused on a limited selection of national newspapers (*Aftenposten*, *Dagbladet*, *Dagens Næringsliv*, *Klassekampen*, *Morgenbladet* and *Verdens Gang*) and have included the largest regional newspaper (*Bergens Tidende*) as well as the website of the national broadcasting corporation *NRK*. The search period is 1995–2013. We intentionally began the search several years before the appointment of the pension commission in 2001 to determine whether any keywords entered the media agenda during an earlier stage. Most of these sources have article records beginning before 1995, except for the smaller, quality newspapers *Klassekampen* (records from 2001 onwards) and *Morgenbladet* (from 2003) as well as the *NRK* website (from 2000).³

Finally, we used surveys on pension reform from 2003 and 2009 to analyse the extent to which public opinion has bought into the communicative discourse in terms of accepting a general need to reform and whether the public believes that the suggested reform measures are appropriate. The 2003 cross-sectional survey (N = 1,000) was conducted by the MMI opinion survey institute on commission from the NOVA research institute and financed by the Ministry of Social Affairs. The survey questions concern attitudes and support of pensions and minimum incomes and questions on the respondents' own socioeconomic position (cf. Bay and Pedersen (2004) and Bay (2005) for further information and findings from the 2003 survey). Central questions concerned crisis understanding and pension reform preparedness. The 2009 survey (N = 1,187) was conducted by the MMI under the auspices of the ISF research institute and included questions concerning the need for pension reform and attitudes towards various reform measures (cf. Pedersen (2012) for the 2009 survey).

The Norwegian survey materials provide a unique opportunity to observe how opinion changes as the reform process unfolds. Unfortunately, no panel study on individual changes of attitudes and their causes exist. However, the

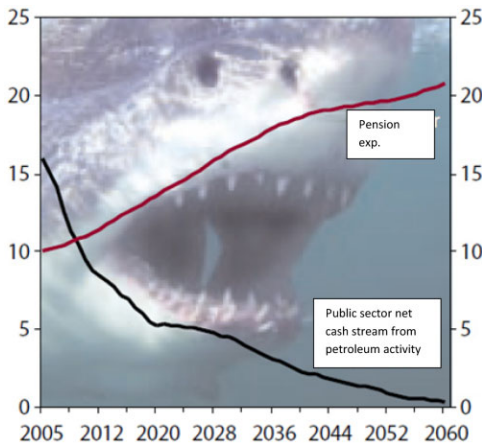
cross-sectional surveys give us information on opinion changes concerning support for reform options, although we cannot identify the individual-level reasons for change.

These materials allow us to come closer to the ‘other side’ of the communicative discourse than does Schmidt’s account with its somewhat restricted focus on policy makers and their message (cf Schmidt 2000, 232–3). The survey materials we use are also more adequate and more focused than the international surveys used by Schmidt because the latter contain more general survey questions on welfare state attitudes, whereas our materials focuses specifically on pension reform.

The Coordinative Discourse: The ‘Shark Jaw’ and the Necessity for Reform

A key aspect of the attempt to forge a consensus regarding the necessity for reform is presenting a description of the pension problem that gains acceptance among the central stakeholders. As noted by Stoltenberg (2003), it was during his time as Minister of Finance in 1996–7 that he was introduced to the term ‘shark jaw’ (*‘Haikjeften’*). As he notes: *‘Then I was presented with a figural illustration, the only in the national budget with its own name, the so-called “Shark Jaw” ’* (Stoltenberg 2003).⁴ Figure 1 provides an illustration of this ‘shark jaw’. The increasing upper line shows pension expenditures as a percentage of GDP in mainland Norway for the period 2005–60, whereas

Figure 1. The Shark Jaw.



Note: Text translated from Norwegian by the authors.

Source: Finansdepartementet og Arbeids- og sosialdepartementet (2004a, 7).

the decreasing lower line represents the public sector net cash stream from petroleum activity as a percentage of the mainland GDP.

The point of this frightening picture is to make clear the fact that future oil revenues cannot close the expected financing gap. Thus, the image is intended to debunk the popular idea that pension reform is unnecessary because Norway is such a wealthy country. Our interviewees mentioned the importance of the shark jaw illustration in portraying the relationship between future increasing pension expenditures and the reduced stream of petroleum revenue in upcoming years.

In 2001, the Stoltenberg I government presented a chapter in the long-term programme for the 2002–5 period on ‘a solidaristic and sustainable pension system’. In that chapter, the motivation for appointing a pension commission was that the substantial challenges resulting from an ageing population combined with higher average benefits would lead to a strong increase in pension expenditures throughout the century (St. meld. nr. 30 2001, 465). In addition, if the trend of early retirement continued, then it would reinforce the worsening of the dependency burden. How were these economic challenges presented? The government emphasised the rather unique Norwegian experience as it concerned future increases in pension spending; while all countries were expected to spend an increasing portion of their GDP on pensions in 2050, Norway was projected to experience the most dramatic increase in the years ahead (St. meld. nr. 30 2001, 480). By this account, an unreformed system would clearly exert pressure on future public finances. The government also noted that many countries had already reformed their public pension systems and were thus able to curb the growth in pension expenditures.

In meeting future pension burdens within a pay-as-you-go (PAYG) system, there were basically three choices: the first was to increase taxation, the second to reduce future pension benefits and increase the pension age, and the third to reduce public expenditures in other public policy areas. Norway had an additional public source of financing by tapping into resources from the petroleum fund. In a PAYG system, payments into the system come from taxes on labour (income) or consumption. Taxation on labour may lead to a lower labour supply, thereby creating an efficiency loss for society as a whole.

In sum, two factors were emphasised in framing the need for reform: first, Norway’s increase in future spending was exceptionally high in comparative terms; and second, there were the detrimental effects of increasing taxation. This effect occurred because taxation in itself led to efficiency losses, and particularly progressive and redistributive aspects of taxation were problematic because they weakened the symmetry between paid contributions and rights in the system. Thus, people would come to view their pension contributions as a tax rather than as compulsory savings. In this manner,

increasing taxes as a main road to pension reform was effectively undermined by the above arguments.

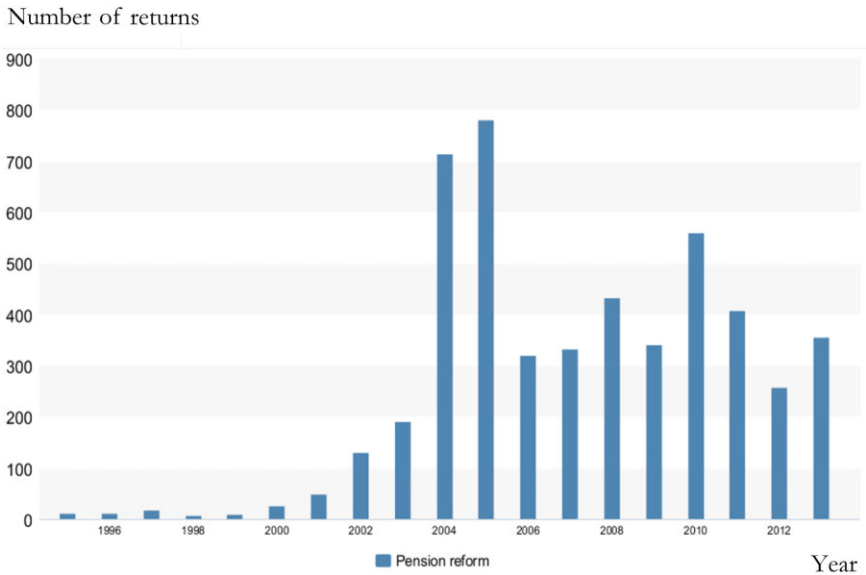
Although policy ideas were proposed at this time, it was the work of the pension commission and its report that created momentum for reform and specified the particular elements for a major structural overhaul of the Norwegian pension system, including three key retrenchment elements: the introduction of a longevity factor; a move towards actuarial neutrality as part of the flexible pension age introduced; and the indexation rule for pensions in payment, providing less than full wage compensation (NOU 2004: 1, 11–12).

A key insight gleaned from our interviews is that understanding of the problem was heavily dominated by the outlook from the Ministry of Finance and the *Statistisk Sentralbyrå* (SSB) (Statistics Norway). Both the Ministry of Finance and the SSB had important roles in the pension commission's work as the secretariat was placed in the Ministry of Finance and was the 'engine' of the commission work. Given the complexity of the pension issue and the technical expertise and 'calculative' resources in the hands of these two actors, it seems reasonable to assume that they held a dominant position over the politicians in the commission regarding both the description of the problem and possible policy solutions. Thus, in terms of a coordinative discourse consisting of 'individuals and groups at the centre of policy construction who are involved in the creation, elaboration and justification of policy and programmatic ideas' (Schmidt 2008, 310), the secretariat and members of the pension commission were the central policy actors.

The basic understanding of the problem was concisely formulated by one of the key reform actors as a combination of increasing longevity and a pension system that did not account for increasing longevity (i.e., a situation with increasing longevity and a pension system offering a fixed pension age and benefits that are not adjusted for pension age or longevity). This demographic perspective was also emphasised by politicians who cited the worsening of the ratio between working-age people and inactive retired persons (i.e., the old age dependency ratio (OADR)) as the key illustration of the pension problem. In framing this understanding of the problem, the informants highlighted several indicators and descriptive tools. In addition to the OADR, there were descriptions of longevity changes and an overview of time spent in education, work and retirement.⁵ A more dramatic and vivid description was the '*eldrebølgen*' (i.e., 'the old age wave' depicting the rising share of older people in the overall population).

Indicators for measuring future burdens more directly were also mentioned, such as pension costs as a percentage of GDP and tax increases that would be needed to finance this burden, future changes in the necessary pension premium on wages and pension income, and the method of generational or intergenerational accounting.⁶ Concerning generational

Figure 2. Returns on Keyword 'Pension Reform', 1995–2013.



Source: ATEKST Retriever, 27 January 2014.

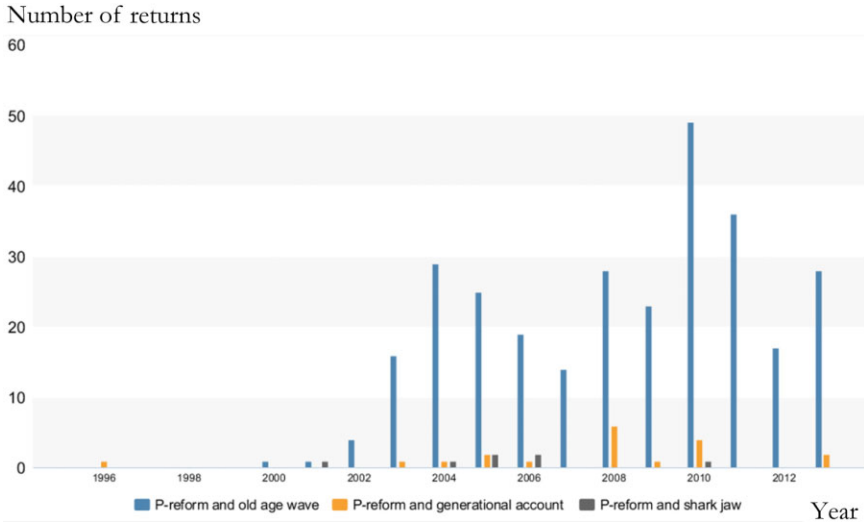
accounting, Norway was one of the pioneering countries in applying this method (Auerbach *et al.* 1999). According to the informants, the generational accounting perspective was important in advocating the need for reform.

Were these concepts and indicators traceable in the public media debate on pension reform? To provide insight into that question, we need to have an overall scale to which the findings can be related. Thus, Figure 2 shows the results of our search for articles containing the keyword 'pension reform' (*'pensjonsreform'*), restricted to our chosen media as listed above.

This search provided a total of 4,969 returns for the 1995–2013 period. The figure reveals increasing attention to pension reform beginning around the appointment of the commission and a particularly strong increase around the time that the report was disseminated in 2004 and the subsequent political agreement in 2005. A new upsurge in interest was identified in the year before the implementation of the reform in 2011. Figure 3 displays a media search for 'pension reform' combined with 'old age wave' (*'eldrebølgen'*), 'generational account' (*'generasjonsregnskap'*) and 'shark jaw' (*'haikjeften'*) for the 1995–2013 period.

The 'old age wave' keyword had a peak before the dissemination of the pension commission report, and there was a high incidence of this keyword

Figure 3. Keyword Returns on ‘Pension Reform’ and ‘Old Age Wave’, ‘Generational Account’ and ‘Shark Jaw’.



Source: ATEKST Retriever, 27 January 2014.

in the years surrounding the implementation of the pension reform. This observation indicates that this image has entered the broader public agenda and has become part of the communicative discourse on pensions and ageing challenges.

Both ‘generational account’ and ‘shark jaw’ had few returns. Given their low number of occurrences, these keywords appear more likely to have been used within a community of specialists, as our interviews and documentary analysis illustrate, and hence they should be regarded as building blocks within the coordinative discourse (cf Schmidt 2000).⁷ However, these keywords were also used in presentations of then-Minister of Finance Per-Kristian Foss (H) in communications with a wider audience regarding the need for reform (Foss 2003) as well as in briefs from the Ministries of Finance and Labour and Social Affairs in 2004.

The shark jaw is a metaphor for the argument that the balance between future pension obligations and oil revenues demands reform. Arguments on pension obligations and the lack of sustainability are extensively used in parliamentary and public debates on pension reform. The shark jaw is thus a fitting illustration of the argument, justifying the need for reform even if this rhetorical tool is not that widespread.

Key Actor Consensus and the Disappearing Dissenters

According to our interviews, the above elements of the understanding of the problem contributed to shaping a strong need for reforming the existing system. This outlook ruled strongly within the key ministries, within other state institutions concerned with pensions, among a majority of politicians, within employer interest organisations and within the financial sector. Actors within the pension policy community providing critiques or questioning the economic understanding of the problem included employee organisations, user interest organisations and representatives from the Frp and SV. For instance, the Norwegian Confederation of Trade Unions (LO) argued in its hearing statement that the commission had interpreted its mandate primarily in terms of public finance savings and austerity measures (LO 2004). The LO found that the commission had provided a distorted picture of the financial basis of the national insurance system by underestimating the costs associated with transferring pension expenditures from the national insurance fund to other pension institutions, by underestimating the contributions to financing from the petroleum fund, and by ignoring the possibility of increasing contributions and taxes from employers and employees to reach the levels observed in other countries.

Furthermore, the UHO (*Utdanningsgruppenes Hovedorganisasjon*) – the employee organisation representing teachers, nurses and policemen – questioned the economic need for reform and asked why it was necessary first to recommend national insurance reductions and then to compensate by legislating mandatory service pensions (UHO 2004).

Some of these critical points were made in the interviews. However, our informants conveyed that they quite soon in the reform process came to view such resistance, in terms of questioning the understanding of the problem and the preferred main solution, as pointless. It was argued that substantial changes would be made and that attempting to change the main reform elements was futile. Hence, the optimal course of action was to identify areas in which they could have influence and improve reform outcomes.

Moreover, within the LO, there was a gradual internal recognition of the need for stabilisation mechanisms in the system in terms of longevity adjustment (LO 2005, 321–7). As the 2005 LO Congress accepted the longevity adjustment, a key potential veto player had joined forces with the pro-reform actors. With the incoming red-green coalition government, which had made an election pledge that the general tax level should not be increased, alternatives considering increased tax financing to meet the growing pension expenditure were definitely buried.

The main critique of the commission's understanding rested on a belief among the dissenters that future productivity increases, economic growth and

increasing taxes based on this larger economic ‘cake’ would cover the increasing costs (cf. also St.f. 2007, 2662). However, lacking the resources of the commission, the dissenters were not able to demonstrate this policy solution idea in a convincing manner in terms of providing forecasts on productivity growth and the tax increases needed to finance it. The premise of increasing tax levels was the Achilles heel of this alternative policy discourse as the commission had eliminated the possibility of this proposal as an option. Without tax increases, economic growth and productivity increases were insufficient to meet the pension burden, according to a key expert. The argument was that because the pension system’s magnitude was linked to productivity growth and this in its turn was linked to the wage level, productivity growth would not be helpful at all. Moreover, the fact that productivity growth in the public sector was weaker than that in the private sector would exacerbate the financing problem. By framing the pension problem in this manner, a type of *There Is No Alternative* (TINA) of pensions emerged in terms of available options for reform policy solutions: longevity adjustments of pension benefits and a policy of working longer.

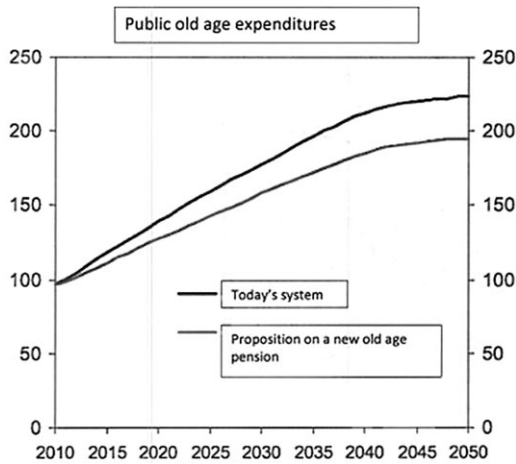
We will now proceed to discuss the elevator image as an umbrella for the arguments directed towards the general public.

The Communicative Discourse: The ‘Elevator’ and Reform as Harmless and Fair

There is some overlap of actors when we move from the policy sphere to the political sphere in which the communicative discourse occurred. Here, we find actors involved in the presentation, deliberation and legitimation of reform ideas to the public (Schmidt 2008, 310). Thus, we also find politicians, government spokespersons and party activists. This overlap includes not only those supporting reform ideas, but also opposition parties as well as other organised interests, media, experts and think tanks. The citizens and voters in the general public who are addressed by the reform message also contribute to the communicative discourse by expressing their support for or disappointment in the suggested reform measures. We capture this discourse and some of the groups involved by analysing opinion surveys and interviews; providing media searches of topical keywords; and focusing on the communicative activities of politicians in parliament, in the media and in addressing key constituencies.

We have explained how the proponents of reform succeeded in persuading opposition forces – particularly those in the trade unions – about the necessity and inevitability of a retrenchment reform. The second step was to sell the content of the reform through what we argue is a communicative discourse directed towards the general public. One means of doing so was to frame it as an *improvement rather than retrenchment*. This idea is represented

Figure 4. The Elevator Argument.



Note: Adoption and translation of figure into English. Values are billions of NOK.

Source: Arbeids- og inkluderingsdepartementet (2006, 4).

by the elevator image used by former Prime Minister Stoltenberg. This policy discourse of progress, which depicts the pension system as an elevator that by default moves one upwards, starkly contrasts with and contradicts the substance of retrenchment in which benefits and replacement levels are reduced.

Figure 4 presents as an approximate illustration of the ‘elevator’, although it shows the future costs of old age pensions by comparing total expenditures for a continuation of the existing system with the government proposition for a new old age pension. The figure shows that both systems ‘elevate’, although the reformed system (the lower line) will not transport one as far upwards (in total expenditure terms) as the old system (upper line) would.

The Prime Minister is quoted as follows when addressing the trade union congress in the midst of the reform process: ‘If you are at the first floor and intend to go to the twelfth floor but only reach the ninth floor, have you then gone down?’ (Moxnes 2013). Stoltenberg used this or similar images in different settings.⁸ A media search combining the elevator illustration and Stoltenberg (not shown here) reveals that this metaphor was used a few times during 2010 (i.e., shortly before the implementation of the reform). The similar ‘little less more’ argument was used earlier, for instance, in an interview given as part of the Labour Party’s press conference presenting their pension model in December 2004 (Arbeiderpartiet 2004). In the interview, then-party and opposition leader Stoltenberg argued as follows:

In 2050, pensioners will have doubled their purchasing power compared with today. Everyone will get much more, but some will have a little less more than others. I don't consider this retrenchment.⁹

Much of the argumentation followed the classical conservative argument of reforming to conserve – to safeguard the pension system, one would sooner or later be forced to reform it (for a similar example, see Schmidt 2000, 248). This need for reform is what we have discussed above in terms of the 'shark jaw'. The claim was that it would thus be much better to begin early to allow for establishing priorities and aims rather than waiting until one was confronted with inevitable cutbacks (cf., e.g., Arbeids- og inkluderingsdepartementet 2006, 10). As such, the reform does not reduce pensions but forgoes large increases. As illustrated above by Prime Minister Stoltenberg, this argument of 'a little less more' portraying the reform as relatively harmless was used in different versions and with different images. The elevator image is first and foremost a collective term for broader policy stories containing other important elements and indicators, as will be revealed in the following discussion. The common denominator is 'a little less more'.

Interviews confirmed that there was little emphasis on informing and convincing the general public of the need for and content of the reform. This discussion with the public was not part of the terms of reference and was reserved for the politicians. However, as part of the reform process, the government developed some informative material. These briefs, which are available online (<http://www.pensjonsreform.no>) are interesting as sources in which the main arguments are presented in a simple manner. The briefs convey the idea that the consequences of the reform are not dramatic and are decided by individual choice: it is possible for each individual to adjust to the new rules by working longer and thereby benefitting from the new approach to establishing pensions (e.g., Arbeids- og inkluderingsdepartementet 2006). This argument of being able to choose to work more and adjust to new rules is widespread throughout the broader pension reform debate (cf Finansdepartementet og Arbeids- og sosialdepartementet 2004b, 17).

Arguments supporting the fairness of reform are made by showing that people with different incomes ultimately receive similar pension benefits in the old system or by demonstrating how people (women) with low incomes and interrupted labour market participation records ultimately receive low pensions (Arbeids- og inkluderingsdepartementet 2006, 5). The message here is that the new system will result in several important improvements. These arguments may be subsumed under the ideal of *fairness* and *justice*.

After identifying weaknesses in the existing system, it is logical to implement a reform to correct these flaws. One prominent example is as follows: by referring to how people with similar incomes would receive different

pensions, the strengthened correspondence between income and actual pension benefits could be justified, thus establishing incentives to encourage people to work more. From a generational perspective, it could be argued that it was fair to reform the pension system to ensure that today's young people would also benefit from a generous public scheme. Schmidt (2000, 231) refers to this intergenerational solidarity as one value that justifies benefit reductions. Highlighting the value of being able to choose one's own future could accompany the introduction of the flexible pension age and the longevity factor as entrusting individuals with the choice of (and responsibility for) what constitutes a sufficient and fair pension level.

This fairness argument placed the reform in a much more positive light than would a focus on lower benefits and less redistribution. This part of the reform would even allow policy makers to claim credit and assume responsibility for change (cf. Levy 2010, 562). This position becomes clear when one studies the two phases of the reform process that Pedersen (2009, 145) has referred to as the most politicised – that is, the periods surrounding two parliamentary pension settlements of 2005 and 2007 – and more closely examines the parliamentary debates following these settlements.

The pension commission presented a modernised national insurance system that strengthened the link between contributions and benefits. The result of this link in redistributive terms was that those with lower and middle incomes would receive somewhat less, whereas those with higher wages would receive more in the future. It was this aspect of the reform that garnered the most attention and was extensively discussed in the two parliamentary debates in 2005 and 2007.¹⁰ The debates considered the social fairness of the system, and Ap representatives emphasised the need to improve the fairness of the system and to obtain a better redistributive profile than that presented by the pension commission, on which the Bondevik II government's proposal was based.¹¹ To support the reform and to build a broad cross-party consensus, the Ap demanded a redistributive profile closer to the old system. This demand was accepted by the Bondevik government, and Ap representatives were able to argue that they had negotiated an improvement of the system's redistributive profile. Thus, the strong focus on the improvement of distribution made the potential distributive consequences of the longevity adjustment fade into the background, while not completely disappearing (cf. e.g., St.forh. 2005, 2358, Røys, SV). A communicative discourse focusing on the need to improve some distributive outcomes fit nicely with the traditional image of the Labour Party, which is associated with social fairness and redistribution, and should have resonated with its core electoral constituency. Moreover, fairness arguments of solidarity between generations were also used as justification for the reform and as a means of securing the sustainability of the system (cf St.forh. 2005, 2350, Larsen, H; 2359, Eriksen, H; 2361 Sørffonn, Krf; 2369, Nilsen, H).

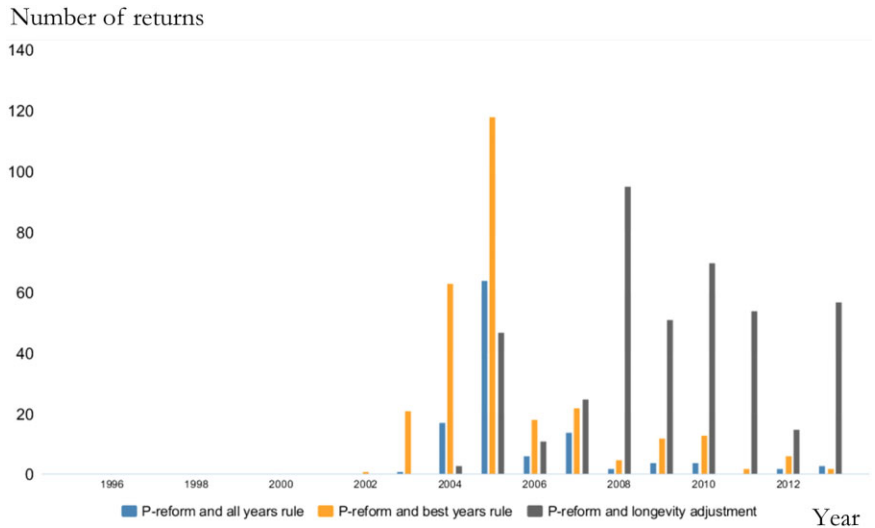
In the parliamentary debate on the second pension settlement in 2007 (St.forh. 2007), arguments similar to those made in the 2005 debate arose. Bjarne Håkon Hansen, Minister of Labour and Inclusion, claimed that it was unfair that the pre-reform system had such a weak correspondence between life income and pension (St.forh. 2007, 2670). Karen Andersen, representing the SV – a party that did not accept the first settlement in 2005 – argued that change was needed because the current system was unfair (St.forh. 2007, 2664). The dwindling opposition, however, represented by Robert Eriksson, FrP, claimed that the reform was simply a retrenchment measure (St.forh. 2007, 2659). In sum, many of the arguments of the communicative discourse described above recurred in these parliamentary debates. Many MPs also claim that the pension reform reflects responsible policy makers, and that it is important for politicians to ensure that the population understands ‘that what we do is fair, good and necessary’ (e.g., St.forh. 2007, 2671, Hanssen, AP).

Although the focus early in the reform process was on ‘a little less more’, fairness arguments were also crucial. Specifically concerning fairness and justice, a key issue in the public pension discourse concerned the removal of the best-years rule (*besteårsregel*) and its replacement with an all-years rule (*alleårsregel*), as well as the possible negative consequences of that replacement, especially for women with interruptions in their labour market careers.¹² This issue was one of the most heated topics when the pension commission released its report, and it created uncertainty within unions. The media search shown in Figure 5 reflects this attention and, by including the search term ‘longevity adjustment’ (*levealdersjustering*), indicates how a key element of retrenchment was overshadowed to some extent by this less dramatic reform element in the immediate years after the release of the pension commission report and its recommendations

Pension Reform and the People: A Successful Communicative Discourse?

To what extent was the communicative discourse successful? In a survey from 2003, 55 percent of the respondents supported the following statement: ‘The current pension system has to be changed in order to be able to finance the National Insurance system (*Folketrygden*) in the future.’ By contrast, 39 percent of respondents supported the following assertion: ‘The Norwegian state is so rich that we will manage to maintain today’s National Insurance in the future’ (Bay & Finseraas 2010, 103–4). Thus, this reform preparedness clearly made efforts to overcome reform resistance more easy. However, reform preparedness varied according to educational level; higher education groups were the most supportive, with 65 percent in favour of the need for reform, and those with lower education were the least supportive,

Figure 5. Keywords ‘Pension Reform’ and ‘All-years Rule’, ‘Best-years Rule’ and ‘Longevity Adjustment’, 1995–2013.



Source: ATEKST Retriever, 27 January 2014.

with 36 percent of this group supporting the need for reform. Thus, to embed the reform broadly among the population would require a communicative discourse to convince such sceptical groups.

The 2003 survey asked respondents about their support for different possible reform measures, with a majority (51 percent) in favour of increasing pension contributions, 22 percent supporting an increase in the pension age and only 9 percent supporting a reduction of pension benefits (Bay & Pedersen 2004). This finding is interesting when compared with the understanding of the problem and reform measures contained in the policy discourse of the pension commission: the commission evaluated tax increases as a problem in itself and fully eliminated the possibility of using it as a feasible measure to confront future pension system costs. The commission recommended adjusting benefits downwards (through the introduction of the longevity adjustment factor). Thus, the commission and public opinion appear to have been on opposite sides regarding the favoured reform measures.

To indicate the extent to which reform advocates were successful in convincing the public of the necessary and appropriate means of reform, results from a survey conducted in 2009 may be useful (ISF & MMI 2009). When asked about the strategy of increasing payments into the system (contributions and taxes), 23.8 percent of respondents considered this

strategy to be a 'very good' or 'good' measure. However, 44.7 percent disapproved of this strategy (sums of the categories of 'very bad' and 'bad' measures). Reducing benefits remained unpopular. Only 6.5 percent of respondents considered this strategy to be favourable ('good' or 'very good') idea; 67.8 percent opposed it ('very bad' or 'bad' measure). Opinion was more supportive towards an explicit increase in the pension age: 52 percent supported this idea (combining total and partial agreement scores). Moreover, 79.4 percent of respondents were in total or partial agreement with the following statement: 'People who are exhausted after a hard working career ought to be allowed to retire early without any negative consequences in the size of their pension.' The high response rate favouring for this belief could be interpreted as relatively strong support for having an early retirement social protection mechanism within the pension system. However, at the same time, opinion was divided on the following statement: 'People retiring early ought to pay for this themselves by having yearly lower pension benefits throughout their remaining life time.' Specifically, 38.5 percent of respondents agreed completely (9.4 percent) or partly (29.1 percent) with that statement, whereas 38.7 percent disagreed completely (21.7 percent) or partly (17.0 percent).

Based on these surveys, the communicative discourse was not entirely successful in convincing the public of the merits of the reform. The most successful aspect appears to be the reduced proportion of individuals supporting tax and premium increases as a possible reform alternative, from a majority of the population in 2003 to only a quarter in 2009. However, scepticism towards benefit reductions remains substantial. In addition, Norwegians are divided over the issue of actuarial neutrality (i.e., that each person should bear the cost of retiring early) and are supportive of having an early retirement arrangement for those with difficult and long working careers.

Concluding Summary

We have argued that a coordinative discourse, as illustrated by the crisis image of the 'shark jaw', served to establish consensus regarding the need for comprehensive pension reform primarily within the expert community. The simple message was that the country's unique petroleum income was insufficient to finance future pensions and that reform was thus necessary to secure future sustainability. The 'shark jaw' was not the only image used, but we consider this image to be a collective term for the communication and rhetoric of the coordinative discourse, and it has been used by central actors in the debate. Similarly, the elevator image of reform as giving people not less but only a 'little less more', thus being an improvement rather than a retrenchment, has served as a collective term for the communicative dis-

course that was developed to convince voters to support the reform. Again, the communicative discourse consisted of much more than this simple message – arguably, the rhetoric of justice was more widespread, and flexibility was also important – but the elevator image neatly captured the essence of the strategy of convincing people of the appropriateness of the reform. In this manner, the concepts developed by Schmidt (2000) have proved useful in understanding pension reform in a rich country. Our study shows that it makes sense theoretically and analytically to consider the communicative and coordinative discourse as two phases of a legitimising discourse rather than as two distinct discourses.

There is, however, ample room for future research to explore further the complexity of the Norwegian case, as well as placing it in a comparative framework looking into the use of concepts and symbolic tools across cases in order to draw more generable conclusions about the role of ideas and discourses in previous and ongoing pension reform processes. Another important avenue to take is to compare reform efforts in different areas within the same country. Hagelund and Pedersen (forthcoming), for instance, compare the successful pension reform with the many failures to change the very generous sickness pay scheme in Norway. They find that one reason for the lack of success in sickness pay reform has been the inability to build a common coordinative discourse around the need to retrench the generosity of the system.

Our study of the Norwegian case contributes to the dismantling/retrenchment literature asking ‘Is dismantling really confined to “hard times” or is it a feature of good times too?’ (Jordan et al. 2013, 8) by affirming that retrenchment reforms may well take place in good times too. Norway may thus be considered a deviant case (Seawright & Gerring 2008, 302), giving evidence that even in this situation reform was possible, and so the malleability of entrenched policies is much wider than what is to be expected from the classical retrenchment theory. This leads us to believe that path-breaking reforms are not necessarily constrained by a booming economy; on the contrary, economic growth and high employment may facilitate reform. This is parallel to Overbye’s argument that high interest rates and stable future prospects make defined-contribution schemes more popular and thus easier to implement as part of pension reform (Overbye 2007, 75). Similarly, new work incentives introduced in the reform are less problematic when the economy grows and more workers are needed. Thus it is the framing of crisis that is important. In the Norwegian case, reference was to a future crisis happening if no reform was implemented. This demonstrates the usefulness of an ideational perspective in contributing to the debate on when path-breaking reforms may take place.

We argue that the reform process has been rather pluralistic and consensus-oriented, yet dominated by the elite. The elite have largely

focused on establishing understanding of the need for and content of the reform proposals and less on creating real understanding and approval of the main principles and consequences of the new system. Our view is that the reform has been sold by understating the actual negative aspects of the reform, and this increases the likelihood of backlash and indicates that the communicative discourse will remain important. Resistance and demands for new reforms could occur in the coming years and could cause pension reform to return to the agenda, especially if an economic downturn should occur. Such speculation, however, does not prevent us from claiming that prominent Norwegian policy actors have had great success in conducting a comprehensive retrenchment reform without long-lasting protests. Our main argument is that a coordinative discourse focusing on the need for reform and a communicative discourse claiming that this reform was fair and harmless helped secure this success.

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NOTES

1. Jens Stoltenberg was the leader of the Labour Party (Ap) and was prime minister in 2000–1 and the leader of two 'red-green' majority government coalitions consisting of the Ap, SV and Sp during the 2005–13 period.
2. Jordan et al. (2013) claim that we still have little knowledge of how policy dismantling, understood as an synthesising and overarching concept including the notion of welfare state retrenchment (i.e., as an instance of dismantling), takes place.
3. However, this problem is minor in our explorative account. Keyword returns from the 1995–2000 period were close to zero; thus, excluding these latter sources would likely not have changed the outcomes significantly.
4. All Norwegian quotes are translated into English by the authors of this article.
5. The OADR is defined as the ratio between those aged 65+ and those aged 20–64. This ratio multiplied by 100 provides the percentage of the inactive older population as a share of the active working population.
6. Generational accounting purports to calculate the debt burden that our generation will leave for future generations (Galbraith *et al.* 2009). In the Norwegian context, this method is used for assessing the generational distribution consequences of continuing present budgetary policies when accounting for demographic changes and the commitments of the national insurance scheme (NOU, 2004: 1, Boks 3.2, 50).
7. The media search provided 290 returns for 'old age wave' (i.e., 5.8 percent of all articles containing 'pension reform'), seven for 'shark jaw' and 19 for 'generational account'.
8. Cf., e.g., 'Stoltenberg forsvarer pensjonskutt', *Dagens Næringsliv*, 24 November 2010. Available online at: <http://www.dn.no/forsiden/politikkSamfunn/article2028376.ece>

9. 'Taper tusenvis i måneden', *VG*, 17 December 2004.
10. In the 2005 debate, fairness/unfairness (*rettferdig/urettferdig*) was mentioned 31 times (over 39 pages), but there was less focus on longevity adjustment (*levealdersjustering*) (occurring only five times in the text). In the 2007 debate, fairness/unfairness was mentioned 20 times over 23 pages, whereas longevity adjustment was mentioned five times. [Flexibility (*fleksibilitet*) was mentioned ten times in 2005 and six times in 2007. The best-years rule (*besteårsregel*) was mentioned three times in 2005 and 20 times in 2007.]
11. Kjell Magne Bondevik (Krf) headed two governments as prime minister: the first from 1997 to 2000 (Bondevik I) and the second from 2001 to 2005 (Bondevik II). The Bondevik II government was a coalition government consisting of the Krf, H and V.
12. Earning pension benefits under an all-years rule implies that all years of income-producing work counts rather than earlier when only the best years (the 20 years with highest income) counted. The new system thus rewards continuous labour force participation stronger while periods of inactivity result in lower benefits than before.

Appendix 1. List of Interviewees

Tomas Berg, Director General, Ministry of Labour and Social Affairs, member of the Secretariat of the Pension Commission (SPC), interviewed in Oslo, 4 June 2013.

Bjørn Halvorsen, Special Advisor, Ministry of Labour and Social Affairs, leader of the SPC, interviewed in Oslo, 3 June 2013.

Anders Folkestad, Leader of the UNIO (formerly UHO), interviewed in Oslo, 4 June 2013.

Per- Kristian Foss, former MP (H) and Minister of Finance (2001–5), interviewed in Oslo, 4 June 2013.

Dennis Fredriksen, Senior Adviser, SSB, interviewed in Oslo, 6 June 2013.

Tor Hersoug, Director for R&D, NHO (Confederation of Business), member of the Council of the Pension Commission (MCPC), interviewed in Oslo, 5 June 2013.

Hilde Olsen, Senior Economist, OECD (former Director at NAV), member of Pension Commission, interviewed in Oslo, 22 August 2013.

Erik Orskaug, Chief Economist, UNIO, interviewed in Oslo, 4 June 2013.

Stein Reegård, Director, Social Policy Department, LO, telephone interview, 11 July 2013.

Sissel Rødevang, Actuary Actecan, former Director, Finance Norway (formerly Norwegian Financial Services Association), MCPC, interviewed in Oslo, 6 June 2013.

Bjørn Tore Stølen, former Chief Economist, YS (Confederation of Vocational Unions), MCPC, interviewed in Oslo, 5 June 2013.

Nils Martin Stølen, Head of Research Unit for Public Economics, SSB, interviewed in Oslo, 6 June 2013.

Gerd-Liv Valla, Adviser, LO, former Leader of the LO (2001–7), interviewed in Oslo, 5 June 2013.

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