

NORFACE
Research Programme

Welfare State Futures

Summary of the Final Evaluation Report



NORFACE
NETWORK

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Introduction

This public summary of the Final Evaluation Report of the NORFACE transnational research programme Welfare State Futures (WSF) provides the key findings and recommendations of the final evaluation that was carried out to measure the achievements of the WSF research programme. The NORFACE Network (New Opportunities for Research Funding Agency Cooperation in Europe) launched the WSF research programme in December 2012. The aim of this programme was to study the Welfare State within multiple countries in times of global social-economic change, in order to encourage theoretical, conceptual and methodological innovation on this complex subject.

The WSF programme had three main objectives:

- To advance globally excellent theoretical and methodological research on welfare state futures, which may be multi-disciplinary, inter-disciplinary and comparative, and which builds synergetically on a pan-European basis.
- To motivate and support excellence and capacity building for research on welfare state futures on a cross-national basis throughout the NORFACE countries.
- To develop understanding and promote research-based knowledge and insight into welfare state futures for issues of societal, practical and policy relevance, with theoretical foundations but worked on jointly with relevant users and experts.

Specifically, the programme covered five themes of research on Welfare State Futures:

1. People and the welfare state;
2. Inequalities, diversity and welfare states;
3. Rethinking the economics of the welfare state;
4. The future politics of the welfare state;
5. Shifting responsibilities for welfare.

After a joint NORFACE Call for Proposals, fifteen transnational research projects were selected for funding within the WSF programme. The projects started late 2014/early 2015 and concluded towards the end of 2018.

Evaluation

After a midterm evaluation of the WSF programme in 2017, the final evaluation had to demonstrate whether the objectives of the programme, outlined above, were met. To this end, NORFACE appointed an international panel consisting of three experts to conduct the successful implementation of the evaluation. The aim of the final evaluation was to identify the progress and achievements of the WSF programme, whilst assessing in how far the programme has added value to the discussion of these particular societal challenges in comparison to nationally funded research programmes.

The panel used three criteria to structure their evaluation:

- A) Scientific quality and visibility, and methodological goals
- B) Implementation of the programme and the scientific co-ordination activities
- C) Dissemination and involvement of potential stakeholders

Findings

A) Scientific quality and visibility, and methodological goals

When looking at the theoretical and methodological research, both the midterm and final evaluation highlighted the high quality of the funded projects and determined excellent theoretical, conceptual and methodological innovation. Furthermore, the aim of creating comparative programmes was met, although teams from Western and Northern Europe were considered somewhat overrepresented in comparison to other geographical areas.

All projects produced at least five joint publications in high quality journals. Some issues with inter-disciplinary publications were identified. The focus of the publication plans in most project teams seemed to show that they prioritised the key journals in the main discipline area of the project, whereas the programme intended to stimulate more of an inter-disciplinary output. The evaluation also found that all projects organised successful workshops and seminars. The thematic workshops on programme-level were also considered well-functioning instruments for encouraging exchange, collaboration and capacity building across the projects. The evaluation did note that a more coherent reporting from the projects to NORFACE on their workshops and seminars may have been possible.

When considering excellence and capacity building, the midterm evaluation had noted a great variation amongst the projects in their training strategies, so the midterm evaluation panel had advised on a more specific structured plan for all projects to enhance capacity building. As the large variation continued to exist, it was somewhat difficult to evaluate capacity building in a systematic manner in the final evaluation. The final evaluation did highlight that most projects financed two or more PhD and/or Postdoc positions each, and concluded that as a whole the programme contributed to capacity building, whilst also emphasising the importance of enabling young researchers to share their experiences across the various projects.

Finally, the evaluation considered how well the programme developed an understanding of, and promoted, research-based knowledge and insight into the future of Welfare States. All projects reported cooperation with stakeholders and policy makers, but the final evaluation noted that the potential for dissemination could have been exploited more fully. The evaluation concluded that certain projects have definitely made some societal impact, and have thus started a vital process that has only just commenced.

B) Implementation of the programme and the scientific co-ordination activities

The final evaluation outlined that the added value of the WSF programme was clear, due to the opportunities generated to exchange visits between research partners, include and compare country specific features of the welfare state, combine theoretical and empirical expertise in new ways, develop new perspectives and more networks, develop new joint projects, install training of the junior researchers, and generate additional co-publishing. The evaluation highlighted that a trans-national platform such as this NORFACE initiative could breach the gap between national and EU funding, and promote multidisciplinary research even further.

A further compliment was given to the scale of the ambition shown by the Scientific Programme Coordinator, Professor Ellen Immergut (European University Institute), which generated a very positive final conference; but also led to the installation of cross-project thematic workshops, book deals, and voucher systems, alongside an annual project leader forum. The Twitter feed and newsletters were seen as a positive step, although they would have benefitted from more cohesion between projects.

C) Dissemination and involvement of potential stakeholders

There was confidence that outreach will develop strongly even after the completion of the programme, if the dissemination plan outlined by the Scientific Programme Coordinator will be followed. This dissemination plan includes the following activities:

- Producing and publishing an overall scientific document to summarize the chief findings of the WSF programme in the form of a Palgrave Macmillan Pivot;
- Producing and disseminating a Policy Brief to disseminate key policy-relevant findings of the WSF programme to stakeholders at the European Level;
- Producing a five-part series as the final five issues of the WSF newsletter;

- Producing a multi-media animation for dissemination to a non-scientific audience with a focus on impact;
- Leaving a lasting legacy through a WSF Wikipedia site;
- Providing for a transfer of the web documents to the NORFACE website;
- Implementing further provisions for data deposit.

Final conclusion and recommendations

The final evaluation concluded that the programme was overall a significant success, with international cooperation facilitating cross-boundary research and therefore more prevalent studies, outlining that this type of programme can potentially breach the “gap between the national and EU funding, and to contribute new basic research which also has potential for societal impact”.

The evaluation also pointed out the opportunities for improvement, through a range of recommendations for future NORFACE programmes. These are as follows:

1. *Legacy*: Systems for preserving and updating the information about the projects would benefit the projects and the overarching programme.
2. *Programme seminars and activities*: Thematic workshops, PhD and Postdoc training and a final conference were considered positive steps. The evaluation recommended a larger kick-off event for future NORFACE programmes.
3. *Scientific Programme Coordinator*: A more pre-defined role needs to be developed. Ensuring both dissemination and research quality is a tricky balance to achieve for this function. The evaluation highlighted that professional communications staff could improve and ease the work of the Scientific Programme Coordinator, as fluid communications could be of great benefit to the programme.
4. *Data*: Proper storage and easy access was recommended, in light of the commitment to open science. A comprehensive data storage plan is required.
5. *Coordination*: Projects can be linked more efficiently, through improved communication and a kick-off meeting. The reporting forms may need altering as well to improve consistency and evaluation.

For more information on the WSF programme, please visit the [NORFACE website](#).