

# THE ELECTORAL POLITICS OF WELFARE STATE REFORMS

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## INTRODUCTION

One of the main claims of Paul Pierson's (1994, 1996) seminal work on the welfare state is that retrenchment is a highly risky endeavour for policymakers since cutbacks of benefits and services are generally unpopular with voters. However, according to Pierson, policymakers—driven by ideological conviction or fiscal pressure—may be able to avoid electoral punishment by applying different blame avoidance strategies. The design of welfare state reforms is thus deeply affected by policymakers' short-term vote-seeking considerations, with partisan politics prevalent in the golden age (Huber and Stephens 2001) receding to the background.

The 'new politics' framework outlined by Pierson and others (Pierson 1996, 2001) thus contained several original hypotheses concerning electoral competition and welfare state reforms which deserved more scrutiny: Do governments shy away from retrenchment? Are they indeed punished for cutting welfare programmes and rewarded for expanding them? Do they use blame avoidance strategies to avert electoral punishment and, if this is the case, under what conditions are they successful? Finally, does government partisanship play a role in this context or does it not make a big difference anymore? Over the last 25 years, welfare state scholars have not only tried to answer these and related questions but also refined and extended the original theoretical framework, e.g., by emphasizing the role of framing and timing in policymakers' efforts to avoid the blame for unpopular reforms.

The chapter is structured as follows: First, we look back at the state of knowledge around 2000. We then describe the main advances over the last 25 years. Starting from the somewhat surprising finding that welfare state changes may have no systematic electoral consequences, we turn to the underlying causal mechanisms. In this context, we take a closer look at voter preferences and discuss the advances in our theoretical and empirical knowledge on the politics of blame avoidance. In the concluding section, we provide a critical assessment of the literature, highlighting some blind spots and pointing to future avenues for research.

## THE ELECTORAL POLITICS OF THE WELFARE STATE: WHAT WE KNEW 25 YEARS AGO

Around 2000, Pierson's (1996) theory of the 'new politics of the welfare state' informed the debate on electoral competition and welfare state reforms (see Chap. 6).

Confronted with the ‘irresistible forces’ (Pierson 1998) of globalization, lower economic growth, and demographic pressure, Pierson and others argued that mature welfare states had entered the era of permanent austerity requiring retrenchment (Pierson 2001). However, given the popularity of the welfare state with voters and their inherent negativity bias, even neoconservative critics of the welfare state, such as Margaret Thatcher and Ronald Reagan, would be reluctant to introduce radical and therefore visible cuts (Pierson 1994). They instead had different blame avoidance strategies at their disposal to avert electoral punishment (Weaver 1986; Pierson 1994, pp. 19–26): obfuscating responsibility, sparing some benefit recipients at the expense of others, and providing some kind of compensation, such as subsidizing private benefits. An important implication of the ‘new politics’ hypothesis was that the strong partisan effects of the ‘golden age’ would not persist since the opposing forces of limited fiscal resources and popular welfare programmes meant that both the left and the right were restricted in their policy options (Pierson 1996, 1998).

Building on Pierson’s insight that the politics of retrenchment differed from the politics of expansion, scholars turned to the conditions which made retrenchment more likely. Here, the ‘Nixon goes to China’ argument went further than the original framework by claiming that retrenchment was more likely under left governments than under right governments for two reasons. First, the former could present themselves as credible defenders of the welfare state, thus facing less punishment by voters than parties of the right (Ross 2000a; Green-Pedersen 2001). Second, party competition shaped welfare retrenchment by affecting left and right parties’ vote- and office-seeking calculations in different ways (Green-Pedersen 2001; Kitschelt 2001). Green-Pedersen (2001) argued that retrenchment would be stronger in systems with a pivotal centre party than in left-right bloc systems since—in the former constellation—a centre-right coalition could implement benefit cuts without losing office. Kitschelt (2001), amongst others, pointed to the high obstacles for retrenchment when two strong pro-welfare parties competed for votes. Interest groups representing benefit recipients were pointed out as additional opponents of retrenchment (see Chap. 4).

Other researchers focused on the impact of political institutions on the politics of retrenchment. The main insight was that a strong centralization of power facilitated the introduction of benefit cuts but also increased electoral risks, as avoiding responsibility for benefit cuts was more difficult under these conditions (Pierson 1994, pp. 32–36; Bonoli 2001). As already emphasized by Pierson (1994, pp. 39–50), existing welfare state structures constituted another important institutional factor since they created policy feedback strongly affecting retrenchment efforts (see Chap. 6). The most prominent example was provided by matured pay-as-you-go pension systems which created a ‘double-payment problem’ for policymakers, making radical shifts to funded pensions tantamount to political suicide (Pierson 1994, pp. 53–99; Myles and Pierson 2001). In other cases, the distributional injustices inscribed in social policy programmes could help policymakers to turn ‘vice into virtue’ by justifying spending

cuts with fighting inequities (Levy 1999). On a more general level, this pointed to the importance of the framing of reforms (Ross 2000b).

Overall, Pierson's 'new politics' thesis put the electoral politics of retrenchment at the forefront of the research agenda. Starting from the premise that the welfare state was popular but hard to sustain in the era of permanent austerity, empirical research focused on how political and institutional conditions shaped retrenchment politics. However, the central claim that retrenchment was indeed punished by voters if policymakers did not adopt blame avoidance strategies was generally taken for granted and not seriously tested. Consequently, the effectiveness of the different strategies outlined by Pierson in preventing negative political consequences also needed more scrutiny.

### THE ELECTORAL POLITICS OF THE WELFARE STATE: WHAT WE LEARNT IN THE PAST 25 YEARS

Considerable time has passed since Pierson and colleagues spawned a welfare state literature that focused on welfare retrenchment and the strategies of parties to avoid electoral punishment for it. It is therefore helpful to take stock and reflect on what we have learned.

The first insight is that—far from some doomsday expectations—we do not live in a world of permanent retrenchment. In fact, empirical data shows that welfare state expansion has been just as likely as retrenchment, although there are substantial differences across welfare states and welfare programmes (Jensen and Wenzelburger 2021, pp. 34–50; Scruggs and Ramalho Tafoya 2022). Nevertheless, empirical research has primarily focused on retrenchment and the politics of blame avoidance, whereas expansionary reforms and credit claiming have received much less attention (but see Bonoli 2012). We will return to this observation in the concluding section. In the remainder of this section, we review academic research focusing on three topics that attracted considerable attention: the electoral consequences of welfare state reforms, the role of voter preferences, and the politics of blame avoidance.

#### Do Welfare State Changes Have Electoral Consequences?

Several studies assess the claim that welfare state retrenchment should lead to electoral decline, while expansion is supposed to result in electoral gains for government parties. The consensus from quantitative studies analysing observational data is that—in the short term—neither welfare state expansion nor retrenchment has electoral consequences across all government parties (Armingeon and Giger 2008; Giger and Nelson 2011; Schumacher et al. 2013; Ahrens and Bandau 2023). When pooling all parties, countries, and years, there is no discernible effect of expenditure and generosity changes on electoral outcomes.

At the same time, electoral consequences have been shown to vary across cases and contexts. Several case studies demonstrate that certain reforms—such as the welfare cuts under Germany's 'red-green' Schröder government—were electorally

costly for governing parties, especially social democrats (Arndt 2013; Schwander and Manow 2017). Furthermore, quantitative studies report that electoral consequences selectively arise under left partisanship (Schumacher et al. 2013; Horn 2021), while the evidence is less unanimous for other party families such as Christian democrats (Giger and Nelson 2011; Schumacher et al. 2013). The literature also highlights the salience and temporal stretching of benefit cuts (Armingeon and Giger 2008). Despite these selective findings, the conditional factors exacerbating electoral consequences are inconsistent across studies and are refuted in recent research by Ahrens and Bandau (2023). Overall, the evidence of observational studies therefore suggests that electoral consequences are not uniform. They may arise under specific and possibly idiosyncratic circumstances. Electoral consequences may also take time to unfold (Schwander and Manow 2017; Horn 2021).

In contrast, studies with (quasi-)experimental setups suggest that there are electoral consequences. Voters have lower government satisfaction and willingness to vote for government parties when they are experimentally subjected to proposals on benefit cuts (Hübscher et al. 2021; Bremer and Bürgisser 2023). Other studies using polling data also indicate that welfare state changes are related to government popularity (Lee et al. 2020; Jacques and Haffert 2021). This branch of research thus indicates that changes in the status quo have at least the potential to be electorally consequential.

### A Closer Look at Voter Preferences

The ambivalent results on electoral consequences are illuminated by another research strand in welfare state research that focuses on voter preferences and their role in the political process (see also Chap. 24). These studies call into question whether voters' preferences are consistently translated into electoral consequences. This may explain why experimental research reveals voters' dislike for retrenchment, while observational research cannot confirm the prevalence of real-world electoral decline in many cases.

First, the simplest explanation for the absence of electoral consequences is that voting behaviour largely depends on factors other than welfare issues. For example, it is well-known that partisan identification and candidate orientation are better predictors of voting behaviour than issue orientations (Ahrens 2024). The welfare state is not always salient during election campaigns, and even when it is, there are other issues with more electoral importance for many voters (Armingeon and Giger 2008; Giger and Nelson 2013).

Second, voters neither generally favour welfare expansion nor generally reject retrenchment (Giger 2012), implying that electoral consequences are not automatic. Voters are aware of the trade-offs of welfare reforms, such as their budgetary implications, which prevents them from being blind supporters of the welfare state (Giger and Nelson, 2011, 2013). Furthermore, whether welfare is popular or not depends on the welfare programme in question. Most notably, welfare programmes that insure

against life course-related risks generally enjoy broader support among voters than programmes directed at labour market-related risks (Jensen 2012), reflecting differences in deservingness perceptions.

Third, voter preferences are partly endogenous to the political process, meaning that voters adapt their preferences to realized reforms to protect their partisan identification or because parties provide informational shortcuts (Bullock 2011; Slothuus and Bisgaard 2021). For example, Slothuus and Bisgaard (2021) show that Danish government supporters changed their policy preferences overnight after supposedly unpopular reforms were implemented by their parties. This kind of adaptation diminishes the potential for electoral consequences (Ahrens 2024).

Lastly, voters have limited knowledge regarding social policies and their impact on income and risk distributions, which limits the potential of voters reacting to real-world policies (Ahrens 2024; Geiger 2018). This is exacerbated by the fact that policymakers can strategically exploit such information deficiencies to manipulate electoral payoffs via the blame avoidance strategies presented in the next section.

### The Politics of Blame Avoidance

Following Pierson's theoretical framework, another strand of research has focused on the politics of blame avoidance to analyse how reform-oriented policymakers try to avoid electoral punishment. Based on interviews with political leaders, Wenzelburger (2014) shows that policymakers perceive benefit cuts as electorally risky and react by either abandoning them or adopting blame avoidance strategies. In this context, Pierson's categorization of blame avoidance strategies (obfuscation, division, and compensation) has proven to be an excellent starting point. Other authors have added strategies and presented more sophisticated typologies (König and Wenzelburger 2014; Vis 2016). Building on the work by Vis (2016), three broad blame avoidance categories can be distinguished to organize the empirical strategies (see Table 23.1).

Though unable to fully review the extensive research (Vis 2016), we summarize some of the main empirical insights. First, governments apply strategies from all three blame avoidance categories. Federal structures and other fragmentation strategies are used to shift or diffuse the blame (Béland and Myles 2012) while predecessors and supra-national institutions are presented as scapegoats (Wenzelburger 2011). Payoffs are also manipulated: benefit cuts are often complemented by extensive reforms to minimize electoral punishment (Knotz and Lindvall 2015; Lee et al. 2020). Other studies highlight strategic timing, showing the adoption of benefit cuts at the beginning and of expansionary reforms at the end of an election period (Wenzelburger 2011; Jensen and Wenzelburger 2021, pp. 84–99).

Furthermore, policymakers mainly use two strategies to manipulate voter perceptions of reforms. One strategy is to hide cuts by using less visible instruments such as qualification periods and indexation rules (Jensen et al. 2018; Jensen and Wenzelburger 2021, pp. 67–83). Another strategy—not covered by Pierson—has received

Table 23.1: *Blame avoidance categories and strategies*

| Categories                  | Strategies                                                                                                                                                                                                                                                                                                            | Conditional factors                                                                                             |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Manipulating responsibility | <i>Pass the buck</i> : Delegate decision-making to another body and constrain its options<br><i>Share responsibility</i> , e.g., with opposition<br><i>Find a scapegoat</i> , e.g., predecessor, EU                                                                                                                   | National political institutions<br>Type of government<br>Supra-national institutions                            |
| Manipulating payoffs        | <i>Dispersion</i> : Keep level of losses low and broad or dispersed over a long time<br><i>Concentration</i> : Impose losses on groups that are politically weak<br><i>Compensation</i> : Provide compensation to part of the group affected by cuts<br><i>Strategic timing</i> : ‘Frontloading’ of unpopular reforms | Welfare state structures<br>Fiscal resources<br>Type of government<br>Welfare pledges<br>Frequency of elections |
| Manipulating perceptions    | <i>Obfuscation</i> : Design reforms in a way that hides cuts, e.g., indexation of benefits<br><i>Framing</i> reforms as inevitable, just, necessary for the greater good                                                                                                                                              | Welfare state structures<br>Fiscal pressure<br>Issue ownership                                                  |

much attention: the favourable framing of reforms, e.g., by emphasizing the inevitability of measures, their budgetary benefits, or the undeservingness of beneficiaries (Slothuus 2007). If policymakers are successful in (re-)framing cuts, they can even profit from credit-claiming after retrenchment (Elmelund-Præstekær and Emmenegger 2013).

Second, the choice of blame avoidance strategies is often contingent on conditional factors (see third column of Tab. 1). Institutional and political factors—such as federalism, government type, and government partisanship—affect the ability of governments to share or diffuse the blame (Jensen and Mortensen 2014; see also Chap. 7). Governments’ ability to compensate reform losers hinges on fiscal capabilities, while electoral pledges on welfare state reforms affect the timing of retrenchment (Jensen and Wenzelburger 2021, pp. 84–99). Opportunities to hide negative effects of reforms vary among social policy programs, whereas contextual factors such as high fiscal pressure and issue ownership by governing parties can facilitate the framing of reforms (Nelson 2016).

Finally, frequent use of blame avoidance strategies does not imply that they are necessarily effective. Studies applying experimental designs show that skilful framing increases support for retrenchment (Slothuus 2007; Marx and Schumacher 2016). Some forms of compensatory spending also seem to reduce resistance against welfare cuts (Häusermann et al. 2019). However, it remains unclear to what extent blame avoidance works outside of experimental settings (Starke 2021, p.34). On the one

hand, [Elmelund-Præstekær et al. \(2015\)](#) show that skilful framing of retrenchment measures (but not obfuscation) is associated with higher government support. On the other hand, these effects are not necessarily durable and strong enough to translate into actual electoral behaviour. Further research is needed to substantiate the (lack of) success of blame avoidance strategies and the intervening factors outlined above (or a combination of both). Existing research indicates that successful blame avoidance plays at least some part in the absence of electoral punishment for welfare state retrenchment.

## CRITICAL ASSESSMENT AND OUTLOOK

### Main Advances and Blind Spots

Over the past 25 years, research in the field has substantially increased our knowledge of the electoral politics of welfare state reforms by testing the hypotheses outlined in the ‘new politics’ framework. Thanks to primarily quantitative research on preferences (see also Chap. 24), we now know much more about what kinds of welfare state reforms are electorally risky. Furthermore, we have learnt more about the blame avoidance strategies applied by policymakers to prevent electoral punishment. One major insight in this context is that—regardless of the design—the framing of reforms affects their evaluation by voters. In line with our advanced knowledge of preferences and blame avoidance, another main empirical finding of the literature is that welfare state cuts are not systematically punished by voters.

The findings on the electoral consequences of welfare retrenchment can be connected to research on the political implications of austerity. This research is relevant in the context of this chapter as austerity packages generally contain a mixture of benefit cuts and tax increases. Whether voters punish governments for austerity is contested in the literature (e.g., [Alesina et al. 2019](#), pp. 175–193; [Hübscher et al. 2021](#); [Jacques and Haffert 2021](#)), although there is clear evidence that governing parties on the left and the right were punished for austerity policies in the wake of the Great Recession ([Alonso and Ruiz-Rufino 2020](#)). Tax-based austerity packages seem to be more unpopular with voters than austerity packages mainly relying on spending cuts ([Alesina et al. 2019](#), pp. 175–193; but see [Hübscher et al. 2021](#)). This is in line with the recent finding that tax changes are electorally more consequential than welfare state reforms ([Ahrens and Bandau 2023, 2024](#)). However, survey experiments suggest that the specific design of austerity packages and the precise composition of benefit cuts and tax increases affect their unpopularity ([Hübscher et al. 2021](#); [Bremer and Bürgisser 2023](#)). In line with the literature on welfare state retrenchment, especially cuts to programmes affecting many voters—first and foremost pension cuts—are highly unpopular with voters.

Turning to blind spots in the literature, research has mainly neglected credit claiming for expansionary reforms. First, driven by Pierson’s emphasis on welfare state retrenchment, research has mainly focused on the politics of blame avoidance. The existing research could thus be complemented with studies on the politics of

credit claiming. A particularly promising approach is to study reform packages that include both components, welfare state retrenchment and expansion (for a theoretical framework see Häusermann 2012). Second, ‘systemic retrenchment’—a crucial concept in Pierson’s original framework which encompasses ‘policy changes that alter the context of future spending decisions’ (Pierson 1994, p.15)—has mostly been ignored by researchers (Jensen et al. 2019). The politics of systemic retrenchment deserve a prominent spot on the research agenda because strategies of systemic retrenchment—such as tax cuts and the tightening of fiscal rules—often contribute to the conditions under which spending cuts are implemented.

The neglect of systemic retrenchment points to wider limitations of the literature. Most research is at least implicitly based on the assumption that voter preferences on the welfare state are exogenous to the political process and that policymakers are mainly reacting to those voter preferences (Ahrens 2024). This approach is ahistoric in the sense that voters’ attitudes are influenced by existing welfare state structures (Bandau 2015). Consequently, policymakers may alter voters’ attitudes by changing these welfare structures, as highlighted by policy feedback theory (Jacobs and Mettler 2018). Furthermore, research on party cues and the framing of reforms—as well as studies on the impact of the media on mass attitudes—indicates that policymakers and other members of the political and economic elite play a substantial role in shaping attitudes toward the welfare state (Slothuus and Bisgaard 2021; Ahrens 2024). One implication is that the media, including social media, their logic of action, and the underlying power structures deserve greater academic attention in future welfare state research, as policymakers and other political actors crucially rely on the media to spread their framing efforts (Neimanns 2023).

### New Developments and Challenges

The financial crisis and the COVID-19 pandemic have contributed to a substantial rise in public debt in many advanced welfare states, adding to structural exogenous and endogenous challenges (see Chap. 2). Furthermore, social policy programmes are not only competing with costly green investment projects for scarce financial resources—after Russia’s invasion of Ukraine, the old question of ‘guns or butter’ is also back on the political agenda (IfW Kiel 2024). The existing trade-offs between welfare state generosity, tax burden, and fiscal sustainability should therefore intensify. On the one hand, increased fiscal pressure could result in the resurgence of austerity, with policymakers employing the costs of rearmament and green investments in new justification strategies to avoid blame for welfare state retrenchment. On the other hand, research indicates that the relationship between the green transformation and the welfare state is more complex. Hence, public backing of environmental action—including diverse carbon pricing strategies imposing financial strain especially on poorer households—may rely on adequate financial assistance from the welfare state (Parth and Vlandas 2022). Future research on the electoral politics of welfare state reforms will have to shed light on these interconnections.

Another major development affecting welfare state politics is the rise of populist radical right parties. Empirical evidence confirms that the surge of the radical right—and the radical left in Southern Europe—is at least partially the result of austerity policies (Gabriel et al. 2023). The electoral success of radical right parties, in turn substantially alters electoral competition, as they compete with the left for the votes of blue-collar workers and with the centre-right for business owners (Oesch and Rennwald 2018). For welfare scholars, this raises multiple questions: How does the radical right deal with the competing welfare preferences of its target groups? How does government participation of the radical right affect the politics of welfare reform? Does welfare chauvinism—which implies the exclusion of migrants and other ‘undeserving’ social groups from benefit receipt—present an effective blame avoidance strategy after welfare state retrenchment for these parties? While welfare state scholars have started to investigate these and related questions (e.g., Chueri 2022; Röth et al. 2018), much more research is needed to reach conclusive answers.

Lastly, a recurring question is how to reconcile the often inconsistent findings from research using different methods and operationalizations. First, differences within quantitative studies are at least partly due to using either social expenditure, programme generosity, or reform number measures (see Chap. 9). While the literature indicates that social expenditure data are too noisy for meaningful inferences, differences across studies remain even when social expenditure studies are disregarded. This is not least because the recent past has seen a surge of studies using survey experiments (e.g., Hübscher et al. 2021; Bremer and Bürgisser 2023). We applaud this innovation, but given the legitimate concerns about the external validity of survey experiments (Barabas and Jerit 2010), we advise some caution regarding the real-world political implications that can be drawn from these studies.

Second, case studies of specific episodes of welfare state retrenchment, such as the German Hartz reforms, generally highlight the negative short- and long-term electoral consequences of those reforms (e.g., Arndt 2013; Schwander and Manow 2017). Hence, case-based research often paints a different picture than quantitative research pooling countries and years. In our view, these discrepancies are not problematic per se. However, there is a need for a closer connection between case studies and quantitative research in the field. Future research can be advanced by further intertwining the research strands, for example, by deducing relevant scope conditions from qualitative studies or by using quantitative methods to identify outliers and other cases whose in-depth analysis can yield new insights into the electoral politics of the welfare state.

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