

# **Taking Stock of the Comparative Literature on the Role of Blame Avoidance Strategies in Social Policy Reform**

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## **Abstract**

In this paper, I take stock of and review the comparative literature on blame avoidance strategies in social policy reform to identify the conditions under which blame avoidance strategies are necessary (or not). This helps to solve the seemingly contradictory findings that blame avoidance strategies may not (always) be necessary while they are often employed. Moreover, I propose that experimental designs help to establish the effect of blame avoidance strategies and present an approach for assessing systematically the employment and success of blame avoidance strategies. Hereby, I outline a research agenda for comparative theory development.

**Key words:** Welfare state retrenchment; blame avoidance strategies; strategic communication; credit-claiming retrenchment; comparative social policy analysis

## 1. Introduction

Under which conditions are blame avoidance strategies necessary for social policy reforms?

Such reforms, for instance of unemployment insurance, have been taken by many governments over the past decades (see e.g. Palier 2010; Häusermann 2010; Vis 2010; Hemerijck 2013).

Reforms typically mean having to decide how to distribute scarce public funds. This entails difficult political trade-offs (Breunig and Busemeyer 2012; Jensen and Mortensen 2013; Van Kersbergen and Vis 2014), making reforms typically *electorally risky*. They are also *institutionally difficult* because of path dependence and the presence of veto players who can block the reforms (Pierson 1994, 2001). The comparative welfare state literature describing and explaining social policy reforms has made great theoretical and empirical strides since Pierson's (1994) 'new politics of the welfare state' argument started off the debate.<sup>1</sup> Pierson argued that the political logic of welfare retrenchment and expansion differed fundamentally. Whereas governments can claim credit for expansion, they need to avoid the blame that accompanies retrenchment. Therefore, so Pierson argued, blame avoidance strategies – i.e. strategies that governments and other political actors use to avoid possible electoral blame –<sup>2</sup> are necessary for retrenchment.

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<sup>1</sup> Thanks to one of the anonymous reviewers for pointing this out.

<sup>2</sup> Since Weaver's (1986) seminal work, there have been several categorizations of blame avoidance strategies (e.g., Pierson 1994; Hood 2011; Wenzelburger 2011; Van Kersbergen and Vis 2014). Table A1 in the Appendix presents an extension of Pal and Weaver's (2003: 25-33) categorization that I use here (see below). Note that Pal and Weaver speak of loss-imposing strategies. Still, if a political actor succeeds in imposing losses on voters, this implies that she has been able to avoid (some of) the blame that comes with it.

The 1990s literature typically took Pierson's argument for granted and focused on why and how welfare reform took place given the political and institutional hurdles (see Green-Pedersen and Haverland 2002 and Van Kersbergen 2002 for reviews). In the 2000s, scholars increasingly started to examine to what extent retrenchment actually had negative electoral consequences. As I discuss below, this literature shows that this is not necessarily the case. For instance, the what we may label punishment literature demonstrated that some political parties are not punished for retrenching social policies (Arndt 2013; Giger and Nelson 2011, 2013; Schumacher 2012; Schumacher et al. 2013). And another strand of literature showed that retrenchment may present governments with credit-claiming opportunities (Elmelund-Præstekær and Emmenegger 2013; Davidsson and Marx 2013).

Do these findings mean that Pierson was wrong and that blame avoidance strategies are not necessary for social policy reform? Not necessarily, since the punishment literature suffers from omitted variable bias; it does not include a variable tapping into the employment and success of blame avoidance strategies. Hence, we do not know whether the lack of punishment is due to retrenchment not being electorally dangerous or because this electoral danger has been removed with a successful blame avoidance strategy. And the literature that does consider blame avoidance strategies typically focused more on the "how" of retrenchment rather than its electoral effects (e.g., Green-Pedersen 2002; Zohlnhöfer 2007; Starke 2008).

Against this backdrop, under which conditions are blame avoidance strategies necessary for social policy reform? This is the question I address in this paper through a stocktaking exercise, or review, of the recent literature. I particularly assess (1) when retrenchment leads to electoral punishment (implying the need for blame avoidance strategies) and (2) when which type of blame avoidance strategy (manipulating perceptions, manipulating payoffs, manipulating

procedures, see note 2) is employed.<sup>3</sup> I show that an increasing body of empirical research has found that blame avoidance strategies may not be needed for some political parties, especially conservative and liberal ones, because for them retrenchment hardly constitutes an electoral risk. The same applies to some social policies, especially those addressing labor market risks (like unemployment insurance) (Green-Pedersen 2002; Armingeon and Giger 2008; Jensen 2012; Arndt 2013; Giger and Nelson 2011, 2013; Schumacher 2012; Schumacher et al. 2013; Wolf et al. 2014). At the same time, and different than expected according to a ‘Nixon-goes-to-China’ logic (Ross 2000), some studies have found that social democratic parties were punished for retrenchment (Arndt 2013; Schumacher et al. 2013).

Regarding the employment of blame avoidance strategies, I discuss recent work demonstrating that what drives political actors to use blame avoidance strategies is their *perception* that reform is electorally risky (Wenzelburger 2011, 2014). Whether it actually is, is of (much) less importance. This latter finding explains why blame avoidance strategies are extensively used (see e.g., Pal and Weaver 2003).

Furthermore, I discuss recent studies finding – in line with early contributions of Levy (1999) and Ross (2000) – that credit-claiming retrenchment takes place (Elmelund-Præstekær and Emmenegger 2013; Davidsson and Marx 2013). This finding conflicts with the assumption that retrenchment is always an exercise in blame avoidance. Still, as I explain below, credit-

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<sup>3</sup> I include especially English-language empirical studies on advanced western democracies published in international journals, books, and as book chapters that appeared over the last five years. Over this period, especially the punishment literature expanded substantially but, to the best of my knowledge, has not yet been systematically reviewed or connected. When relevant, I also include older publications.

claiming retrenchment does not exclude the need for a blame avoidance strategy.

My stocktaking exercise reveals that although our knowledge on blame avoidance strategies and social policy reform's electoral effects has expanded, we still lack an overarching theory of blame avoidance. A main hindrance here is the lack of an approach for identifying the employment of blame avoidance strategies in social policy reforms and for establishing their success. I therefore propose such an approach, which helps to construct variables to be included in for instance the punishment literature. Another hindrance for comparative theory development lies in lack of knowledge about the (causal) effect of blame avoidance strategies. I propose that experimental designs offer an excellent tool to this end.

## **2. When does social policy reform lead to electoral punishment?**

One of Pierson's (1994) main assumptions was that social policy retrenchment usually raises the risk of electoral retribution. But is retrenchment electorally dangerous for all political parties? Recent studies have taken up this question and come in two – related – flavors. First, studies showing that electoral punishment is a conditional process. Second, studies arguing that retrenchment may offer credit-claiming opportunities. So, under which conditions does reform lead to electoral punishment?

### *Conditional electoral punishment*

A first key finding is that electoral punishment is *not* an automatic process but a conditional one. Punishment occurs only when voters are aware of the reform, willing to act on it (i.e., care about it), and have an alternative party to vote for. In a first study on this topic, Armingeon and Giger (2008) showed that voters punished retrenching governing parties only when retrenchment was a

key issue during the election campaign. Moreover, Giger and Nelson (2013) found that governments that retrenched unemployment benefits, health care or pensions were only punished by so-called unconditional believers. These are voters with high welfare state support who consider the welfare state's economic costs to be low. This was especially the case for the left socialist and socialist party families (idem, table 2). De Vries and Hobolt (2012) demonstrated that voters who were affected negatively by a reduction in universal child benefits in the Netherlands in the 1990s became less likely to vote for incumbent parties, compared to the voters unaffected by the cutbacks. This effect was stronger for the political sophisticates. Related, Van der Velden (2013) showed that only those voters who were affected negatively by the increase in the retirement age in the Netherlands in 2009, and considered themselves as deserving of benefits, and were politically sophisticated punished the incumbents.<sup>4</sup>

Giger and Nelson (2011) found that electoral punishment after retrenchment varied across party families. While no party family systematically lost votes after retrenchment of unemployment insurance, sick pay or pensions, liberal and to a lesser extent religious party families gained votes. While Giger and Nelson's findings fail to support the Nixon-goes-to-China logic for social democratic parties, this logic holds for religious parties. Schumacher et al. (2013) corroborated the conclusion that electoral punishment varies across parties. However, they showed that parties that were actively involved in the welfare state's build-up and expansion, so-called positive welfare image parties (left-wing parties and Christian democrats) did systematically lose votes after retrenchment. Conversely, parties with a negative welfare image (liberals and conservatives) did not. Schumacher et al. thus find no support for the Nixon-goes-to-China logic for both religious and social democratic parties. No Nixon-goes-to-China

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<sup>4</sup> This specific group is small: 3 per cent of the electorate (Van der Velden 2013: 25).

effect is also Lindbom's (2014) conclusion. He found that voters did punish the incumbent social-democratic party for visible retrenchment (the closing down of hospitals' emergency departments). However, they did this only when they could vote for a viable alternative party. More evidence for the absence of a Nixon-goes-to-China effect is Arndt's (2013) study of Third Way labor market reforms by British, Danish, German, and Swedish social democrats, which had negative electoral consequences (see also Arndt 2014). Arndt showed that in majoritarian systems like the UK, with no viable alternative party to vote for, the electoral risk was vote abstention. Similarly, Karreth et al. (2012) found an increasing level of non-voting among social-democratic voters in Germany, Sweden and the UK after a right-ward shift.

Actually, these novel empirical findings are not that surprising. Over a decade ago, Green-Pedersen (2002) already identified the trade-off between keeping the economy on track (which may imply retrenchment at some stage) and upholding the social policy status quo. Punishment for retrenchment would occur only if the reform was politicized and came on the political agenda (cf. Armingeon and Giger 2008). According to Green-Pedersen, it mattered a great deal *how* the retrenchment issue was put on the agenda whether governments were punished or not for it. The reform's framing and justification were crucial (see also next section). Also party competition was hypothesized and empirically illustrated to influence the likeliness of electoral backlash and, hence, the need for blame avoidance strategies (Ross 2000; Kitschelt 2001; Green-Pedersen 2002; Zohlnhöfer 2007).

Another, related explanation for the punishment literature's empirical findings is that voters hold conflicting preferences (Schumacher et al. 2013). Voters simultaneously want to uphold the welfare state status quo *and* want lower government expenditures; generally irreconcilable preferences. The precise preferences vary across voters, with negative [positive]

welfare image parties' voters having stronger preferences for cutting government expenditures [upholding the welfare status quo]. This means that it is easier – though not easy – for negative welfare image parties to retrench and get away with it; whereas it is harder – though not impossible – for positive welfare image parties. Another explanation for the empirical findings would be that some political parties – particularly conservative and liberal ones – are more successful in avoiding blame. However, because the variable employment and success of blame avoidance strategies is omitted from the punishment literature, we do not know if this is the case.

#### *Variation in unpopularity of cutbacks across social policies*

A second key finding of the literature is that there is variation across social policies in the degree of unpopularity of cutbacks. This variation, in turn, may lead to variation in the degree of electoral punishment (see e.g. Pierson 1994). Green-Pedersen (2002) proposed that retrenchment of policies closely related to the labor market are more easily justifiable by governments, who can for instance claim that unemployment benefits cause idleness among the unemployed (i.e. manipulation of perceptions). The electoral risk of cutting back these policies is therefore lower than of policies farther from the labor market (like pensions). Related, Jensen (2012) distinguished social policies addressing labor-market risks (e.g., unemployment) from policies addressing life-course risks (e.g., health, old age). Because life-course risks are largely uncorrelated with the income distribution, contrary to labor-market risks, the median voter is much more favorable toward policies addressing life-course risks than she is towards policies addressing labor-market risks (cf. Esping-Andersen 1999; see Tromborg 2014 for recent empirical evidence). Consequently, Jensen expected (and found) that both left-wing and right-wing governments have an incentive to expand spending on life-course related risks policies.

Moreover, Jensen also showed that right-wing governments have quite some leeway to retrench labor-market policies, at least until labor-market risk exposure rises (e.g. because of poor economic circumstances). Related, Elmelund-Præstekær and Baggesen-Klitgaard (2012: 1093) found that both left-wing and right-wing governments have an incentive to cater to the median voter rather than to core constituencies or party voters regarding policies designed to absorb democratically distributed risks, like healthcare or pensions. These findings also corroborate research on the deservingness of benefit recipients. The latter literature showed that pensioners and the sick are seen as more deserving of a benefit than are the disabled and, particularly, the unemployed (e.g., Petersen et al. 2011).

An increasing body of empirical work supports Jensen's (2012) argument that life-course policies are more popular among voters than labor-market risk policies are, making the former electorally riskier to retrench. Wolf et al. (2014), for example, found that cutbacks to pensions that are particularly unpopular (see also Tepe and Vanhuysse 2011). And Elmelund-Præstekær and Baggesen-Klitgaard (2012) found variation across class-risk and life-course risk policies. Giger and Nelson's (2011) finding that liberal parties do not gain electorally by retrenching sick pay also corroborates Jensen's (2012) argument.<sup>5</sup>

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<sup>5</sup> Giger (2012), conversely, argued that cutbacks of pensions and health care, i.e. life-course risk policies *par excellence*, were only unpopular among those voters who were interested in social policy (probably between 20 and 40 per cent of the sample).

### *Credit-claiming retrenchment*

Another stream of studies has addressed so-called credit-claiming retrenchment,<sup>6</sup> proposing that retrenchment may enable governments to reap electoral gains. Levy (1999) is an early contribution to this line of work. He suggested that retrenchment may be “popular” when it turns vices into virtues, e.g., cutbacks ensuring that people who are neither sick nor disabled no longer receive a disability benefit. Especially under socioeconomically harsh conditions, which provide policymakers with an economic incentive to retrench (Tromborg 2014), retrenchment may become rational from a vote-seeking perspective (Bonoli 2012). But do political actors then engage heads-on in retrenchment, i.e. without resorting to blame avoidance strategies, as Bonoli (2012) proposed, or are such strategies still applied? The latter seems most likely. Drawing on insights from prospect theory (Kahneman and Tversky 1979), Vis and Van Kersbergen (2007) proposed that whether a government is willing to engage in electorally risky reform and whether voters accept this reform depends on the domain in which they find themselves. Facing a positive situation (i.e., gains), individuals behave risk-averse, meaning that governments will abstain from retrenchment and voters will not accept retrenchment. Conversely, facing a deteriorating situation (losses), governments are willing to take the electoral risk of retrenchment and voters may accept this retrenchment. The latter will only be case if the domain of the voters has changed from one of gains into one of losses. And this is anything but an automatic process. While it may be obvious to citizens and political actors alike that “something” needs to be done –

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<sup>6</sup> Credit-claiming retrenchment differs from what Bonoli (2012) labels “affordable” credit-claiming. The latter entails the expansion of policies (like childcare) that may offer a win–win situation by being popular among large segments of the population while simultaneously addressing a social problem (combining work and family life).

the current consensus in most Western democracies that have been hit severely by the Great Recession –, it is not at all obvious *what* this something needs to be. This means that voters need to be convinced not just that *a* decision is needed, but that *this particular* decision is needed. This requires an active strategy from the side of the government. The manipulating perceptions’ strategy damned if you do, damned if you don’t (see Table A1 in the Appendix) is an example hereof.

The studies addressing credit-claiming retrenchment tend to agree on the continuing relevance of blame avoidance. For retrenchment to be credit-claiming, an active reframing strategy from the government is typically considered needed, since retrenchment is unlikely to be popular per se (Elmelund-Præstekær and Emmenegger 2013). Davidsson and Marx (2012) showed that credit claiming retrenchment of unemployment benefits by German and Swedish governments was possible when unemployment was highly salient and issue ownership of successfully addressing unemployment by the government was contested. Under this combination, the tradeoff between keeping the economy on track and upholding the welfare state status quo tilted towards the former.

### *Discussion*

Summing up, when does retrenchment lead to electoral punishment and are blame avoidance strategies, consequently, necessary? First, blame avoidance strategies, especially of the manipulating perceptions type, are needed for credit-claiming retrenchment. They are also needed for cutting back life-course risk policies, like health care. Also political parties that are historically tied to the welfare state (especially social democrats) need to resort to blame avoidance strategies. This finding also demonstrates that, while intuitively plausible, the Nixon-

goes-to-China logic as proposed by Ross does not work. For other political parties retrenchment may not be electorally risky, making blame avoidance strategies possibly unnecessary. This holds especially for retrenchment of labor market risk policies, like unemployment insurance. Note that *may not* should be emphasized here, because of a variable tapping into the employment and success of blame avoidance strategies is not included in punishment studies. This means that the lack of electoral punishment may also result from the success of blame avoidance strategies (cf. Wenzelburger 2014).

Interestingly, Wenzelburger (2011, 2014) has convincingly shown that what motivates political actors to engage in blame avoidance is not so much the real, objective risk of electoral punishment, but political actors' *perception* of the risk of being punished. Wenzelburger conducted qualitative elite interviews with 15 high-level politicians and civil servants from Belgium, Sweden, Canada and France who were in office when their economies faced recessions in the early 1990. He showed that these politicians feared or simply assumed that they would be punished for their austerity measures. The politicians indicated that they used blame avoidance strategies to lower this electoral risk. Thus, the (real) *perception* of electoral risk motivated them to turn to blame avoidance strategies, not the reform's objective risk. This also explains why different types of blame avoidance strategies are so often employed, as the next section shows.

### **3. When is which type of blame avoidance strategy employed?**

Political actors have at their disposal and employ different types of blame avoidance strategies (see note 2). In this paper, I use Pal and Weaver's (2003) broad categories of blame avoidance strategies – *manipulating procedures*, *manipulating perceptions* and *manipulating payoffs* –, because all empirically observed strategies are subsumable under one category; making the

categorization exhaustive. In discussing when which type of strategy is employed, I try to relate as much as possible to the previous section on the conditions under which retrenchment is electorally risky.

### *Manipulating procedures*

The first category of blame avoidance strategies used in social policy reform aims to manipulate procedures. These strategies focus especially on the “formal”, typically institutional, opportunities for avoiding or lowering blame. An example is delegating decision-making power to a lower level (e.g., municipality). Because of the typical focus on institutional set-ups, political actors’ role is less active than with the other two types of blame avoidance strategies. Still, also manipulating procedures is not an automatic process. A typical argument is that the more power is concentrated (i.e. in Westminster systems), the lower are the institutional constraints and veto points and thus the easier it is to enact reforms. Institutionally easier enactment of reforms generally means that the necessity to employ blame avoidance strategies is lower (Wenzelburger 2011: 1158). Concentrated power, however, also indicates concentrated responsibility, which increases rather than reduces the need for blame avoidance. With higher numbers of veto players, i.e. a higher level of power dispersion, it is easier to diffuse blame because responsibility for a measure spreads among many players (e.g., Weaver 1986). In sum, power concentration may either help or hinder blame avoidance, but it typically increases the necessity to resort to blame avoidance strategies.

Several studies examined how the different institutional levels within countries (vertical and horizontal) offer opportunities for avoiding blame and how political actors make use of them. Vertically, Béland and Myles (2012) showed that Canada’s federal system offers

opportunities for blame avoidance or at least blame sharing, which political actors use (see also Lecours and Béland 2010). Costa-i-Font (2010) proposed that decentralized systems with local and central governmental authorities lead to two scenarios. In the first one, which Italy exemplifies, opinions on how to reform clash among institutional levels and the opportunities for blame avoidance are limited, hampering reform. In the second scenario, exemplified by Spain, blame diffusion and blame-sharing enable reform. Focusing on formal authority, i.e. the institutional level that is actually responsible, Mortensen (2013) examined which governmental level got blamed for unpopular policies. Examining responsibility attribution on health care issues in Denmark, based on a content analysis of over 2,000 articles before and after a major health care reform, Mortensen showed that decentralization to a regional authority shifted the possible blame, but also the possible credit. In that sense, decentralizing formal authority had the expected effect of responsibility deflection. Interestingly, and in line with the existence of a negativity effect, Mortensen also found that the central government is more likely to lose credit than to avoid blame (176).

Generally, the effect of federalism on the opportunities for blame avoidance and the occurrence of reform can vary. So-called power-sharing federalism, like the German system, tends to hinder reform, whereas power-separating federalism, like the Canadian system, tends to facilitate reform (Jordan 2009). Related, Wenzelburger (2011: 1176) found that country differences, particularly in terms of their institutional set-up and the political parties in power, influence which political strategies can be used most effectively. And Jensen and Mortensen (2013) showed that institutional fragmentation enabled blame diffusion when retrenching unemployment benefits. Furthermore, Breunig and Busemeyer (2012) found that, under fiscal stress, the electoral system influences which type of spending governments can cut to minimize

electoral losses. In majoritarian systems, governments can best shield discretionary spending (like military spending) from cutbacks, because their constituencies are tied to specific policies. In proportional representation systems, conversely, governments can best shield entitlement policies spending (like unemployment benefits) from cutbacks, because these policies have broad beneficiaries whose votes are needed for re-election (922).

Another type of manipulation of procedures to avoid blame is delegation, for instance delegating public programs to non-state actors. Morgan and Campbell (2011) examined the 2003 Medicare Modernization Act in the US, which expanded Medicare with a prescription drug benefit delivered by competing, private insurance companies. An expansion at the federal level would have been electorally risky, because of ‘a fundamental ambiguity at the heart of public opinion in the United States: that Americans want government programs but dislike government’ (Morgan and Campbell 2011: 6). By ‘delegating public programs to non-state actors’ blame can be avoided – and possibly credit can be claimed, since this ‘satisfies both of these impulses by meeting the public’s demands for security without increasing the apparent size and scope of government’ (7).

All in all, the literature on manipulating procedures suggests that political actors use the opportunities offered by the institutional structure for implementing social policy reform. This literature is typically less interested in reform’s electoral effects than it is in its occurrence and process.

### *Manipulation perceptions*

A second strand of literature focuses on the manipulation of perceptions. These strategies aim to avoid blame by changing the perceptions of those affected by the reform. Note that manipulating

perceptions generally means having to act visibly, conflicting with an underlying assumption in the new politics' literature that reforms are best kept invisible. Above, I already argued that blame avoidance strategies of the manipulating perceptions type are among others employed when political actors try to pursue credit-claiming retrenchment (see e.g. Davidsson and Marx 2012; Elmelund-Præstekær and Emmenegger 2013; but see Bonoli 2012). In addition, using discourse or ideas can be considered a means to manipulate perceptions. A large and expanding literature focuses on the role of discourse and ideas in, for example, social policy reform (see e.g., Schmidt 2008 and Béland and Cox 2011 for overviews). While rich, this literature fails to explain when policymakers take up a specific idea or discourse, and when this idea or discourse has a causal effect. The literature is also generally silent about the strategies policymakers use to implement reforms (cf. Vis and Van Kersbergen 2013).

Another body of empirical work suggests that manipulating perceptions to avoid blame will be easier when the socioeconomic situation is deteriorating (Kuipers 2006; Vis 2010; Hollanders and Vis 2013; Van Kersbergen and Vis 2014). Political actors then may convince voters more easily that something needs to be done to turn the tides, like retrenchment (cf. Tromborg 2014). Still, implementing reform under a dire socioeconomic situation remains difficult, to say the least. The poor approval ratings of most current governments that are implementing reforms signify this. One of the reasons is that during a poor socioeconomic situation, the share of the voters who need, or may soon need, to draw on welfare state benefits increases. This typically leads to higher, not lower, support for social policies (Vis et al. 2011; Margalit 2013). Whether a government is able to get away with reform under this situation also depends on issue ownership: do voters trust the governing party or parties to uphold the welfare state as much as possible *and* do they expect that this party or parties can bring the economy

back on track? We still lack a full understanding of when and why a blame avoidance strategy that manipulates perceptions is successful (or not).

### *Manipulating payoffs*

The blame avoidance strategies falling under the category of manipulating payoffs have received significant attention in the literature. These strategies intend to lower the blame by manipulating the incidence of gains and losses among those affected by the reform. Bonoli and Palier (2007) for example hold that governments have been able to institute radical reforms by targeting predominantly those groups with retrenching policies that are least likely to mobilize politically. In pension reforms, these are often argued to be the younger generations (see Larsen 2008). Whether age is a political cleavage is undecided in the literature, though. According to Goerres (2008), such a cleavage is a myth. His analysis of German pension policy – a country with the majority of voting citizens being aged above 50 years – revealed no age cleavage in terms of party preferences. Manipulating payoffs is not easy.

Already since the 1970s, *timing* within the electoral cycle has been analyzed as an important factor for governments to push-through potentially risky reforms, starting with the literature on political business cycles (Nordhaus 1975, see Drazen 2000; Lewis-Beck and Paldam 2000). Fernández (2012), for example, argued that because of (1) a honeymoon period at the beginning of an electoral cycle, offering political capital to act, and (2) voters' cognitive biases (such as them remembering more recent events better), the political costs of implementing unpopular pension reforms early in the electoral cycle are smaller. Fernández found that the hazard rate of a pension retrenchment is 75 per cent higher in a post-election year than in any other year of the electoral cycle. He also found that the hazard rate of pension retrenchment is

higher when low economic growth is combined with medium or high population ageing (86). Related, Tepe and Vanhuyse (2011) conducted an analysis in which a blame avoidance strategy – the delay of the implementation of a pension reform, so-called strategic timing –, is the dependent variable instead of the independent one. They defined “medium” and “large” “cutback events as reductions over a period of three years of respectively 8 and 12 percent in pension generosity scores” (128), and examined to what extent three factors (partisanship, the electoral cycle and institutional rigidity) account for delays in pension generosity cutbacks. Tepe and Vanhuyse were thus interested in the factors that relate to the use of a blame avoidance strategy (see also Tepe and Vanhuyse 2010: 1215). They found that socioeconomic problem pressure (i.e., rising unemployment and population ageing) delayed large-size cutbacks but accelerated medium-size ones, probably to avoid the even bitterer electoral pill of large cutbacks.

Jacobs (2011) proposed that one of the necessary conditions for governments to make policy investments – i.e. imposing costs today for future benefits, for instance, by opting for a “funded” public pension scheme rather than a pay-as-you-go system – is electoral safety.<sup>7</sup> A government is in such a situation under the – rare – situation that the opposition is weak or divided and the threat to losing office is minimal (45). The more likely scenario is that voters are tilted against such investment, because (1) the detrimental long-term effects have not yet taken place and are therefore discounted by the voters, especially compared to the policy costs or social problems that have already materialized and (2) the complexity of predicting long-term consequences are vast (see also Jacobs and Matthews 2012). Moreover, the electoral risk of a policy investment will be smaller when the policy problem the investment sets out to address is

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<sup>7</sup> The other two necessary conditions for governments to pursue long-term investment are expected long-term social returns and institutional capacity (Jacobs 2011: 50-71).

becoming more salient.

Overall, these studies suggest that manipulating payoffs as a blame avoidance strategy is regularly used. Like with the other two types of strategies, however, it remains an open question whether the strategy is also successful in avoiding electoral losses.

#### **4. Discussion and outline of a research agenda**

In this paper, I have taken stock of the recent literature on blame avoidance strategies in social policy reform to identify the conditions under which blame avoidance strategies are necessary. This literature showed that retrenchment is not electorally risky for all political parties. Some parties, especially liberal and conservative parties, did not systematically lose votes after retrenchment, meaning that resorting to blame avoidance strategies may not be needed for them. Interestingly, social democratic parties were typically found to be punished for retrenchment, indicating that the intuitively plausible Nixon-goes-to-China logic is a myth. Current work also found that cutbacks of some social policies, especially catering to life-course risks (like pensions), is electorally much riskier than of other policies, especially those catering to labor-market risks (like unemployment insurance). Also this suggests that blame avoidance strategies' necessity varies, in this case across policies. There were also studies finding evidence for so-called credit-claiming retrenchment, i.e. retrenchment that enables governments to reap electoral gains. But for such retrenchment to be successful, blame avoidance strategies of the manipulating perceptions type are still needed. The literature also offered ample evidence that different types of blame avoidance strategies were employed. Which one did depends largely on the opportunities existing in the institutional structure (manipulating procedures), on how the reform can be timed or how the reform's gains and losses can be divided (manipulating payoffs),

and on how the reform can be “sold” or strategically communicated (manipulating perceptions).

However, both studies of social policy reform’s electoral effects and those of the employment of blame avoidance strategies failed to examine the full nexus between the reform, blame avoidance strategies, and electoral effects (cf. Wenzelburger 2011). As noted, studies examining reforms’ electoral effects cannot exclude the possibility that there is no – or little – electoral punishment *because* blame avoidance strategies were employed successfully.

Moreover, work addressing the employment of blame avoidance strategies is typically interested more in how blame avoidance strategies enable social policy reform than in whether the strategies are successful in lowering or removing the reform’s electoral fallout. We thus lack a theoretically defined means to identify the employment as well as success of blame avoidance strategies systematically. Developing such measures is difficult but badly needed to clarify the nexus between reform, blame avoidance strategies, and electoral effects.

I suggest a four-step approach on how to proceed (see Table 1). For assessing the *employment of blame avoidance strategies*, we need for each reform: (1) date of proposal for reform, (2) date of the decision to pursue the reform, and (3) date of implementation (Step 1). We also need to know whether the reform was part of a package (Step 2). The latter would be a sign of a manipulating procedure strategy, because packaging a reform hides it. Next, we need information of the reform’s target group or groups (Step 3). Which group(s) of voters gain and which ones lose from the reform? The higher the degree of targeting the stronger is the indication that a manipulating payoffs strategy is being employed. The latter would also be the case if the reform is timed strategically. To assess the employment of a manipulating perceptions strategy (Step 4), we can look at the argumentation given by the political actors who propose the reform. Do they try to convince the voters that the reform is necessary? Do they actively try to

shape voters' attitudes toward the reform? To obtain this information, we can examine official governmental documents (like bill proposals), press statements, and newspaper articles on the proposed reform. Collecting these kinds of data on the employment of blame avoidance strategies should be possible – also for a large number of countries for a relatively long time period and for different types of social policy reform – but it would surely be time-consuming.

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For assessing the *success of blame avoidance strategies*, we could for example compare approval rating of the government or of individual political parties before the reform was proposed and after it. Many other issues than a specific reform could, of course, affect approval ratings. However, if the ratings are close enough to the date at which the reform was proposed, this should provide an indication of the reform's impact. The effect of some of the blame avoidance strategies should be relatively direct. This holds especially for strategies of the manipulating payoffs and manipulating procedures type. If these strategies work, i.e. are successful in lowering the reform's electoral risk, the approval ratings before and after the reform should not differ significantly. The manipulating perceptions strategy would typically take longer to have an effect. Comparing approval ratings just before and just after the reform's proposal (although this should also be done) will therefore not tap into this. Depending on the use of the strategy – which is established in the first step, see above – the “right” moment for assessing the blame avoidance strategy's effect can be established. This would, for instance, be the case if the government no longer communicates the need for the reform through press releases or in newspapers.

### *Experimental research designs*

To further comparative theory development on blame avoidance in social policy reform, I also see much merit in experimental research designs. Experiments are an ideal means to study the causal effect of a particular type of blame avoidance strategy and could thereby offer insights into which strategy is most effective under which conditions. So far, experimental designs are relatively rare in social policy research and in the blame avoidance literature in particular.<sup>8</sup> An exception includes Slothuus (2007), who demonstrated that the way a retrenchment proposal is framed influences individuals' perception of benefit recipients' deservingness. This, in turn, had a strong impact on the support for, or opposition against, the proposed retrenchment. Slothuus' findings indicate that political actors can pull more voters toward the reform by careful framing (i.e., manipulating perceptions). Wenzelburger (2014) is a recent example of an experimental study addressing the effect of blame avoidance strategies, particularly different forms of manipulating perceptions. He finds that these strategies seem to have the desired effect, since attitudes towards the retrenching government are more positive in the experimental group than in the control group.

The empirical results discussed above suggest ample avenues for testing by means of experimental designs. Given the varying degrees of electoral risk involved in different policy reforms (e.g., life-course risk policies like health care versus labor-market risk policies such as unemployment insurance), does the effect of blame avoidance strategies vary across these

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<sup>8</sup> McGraw (1990) and (1991) are examples of early work experimentally testing the effect of different explanatory tactics or accounts that can serve as a means of blame avoidance strategies, namely excuses and justifications.

policies as well? We could test this by comparing the effect of the same kind of blame avoidance strategy (e.g., manipulating perceptions) across two policy areas. It seems plausible that it is easier to manipulate citizens' perceptions regarding retrenchment of labor-market risk policies than of life-course risk policies. It would also be interesting to test the blame avoidance effect of different policy instruments such as indexation (an example of manipulating procedures). Another route interesting to pursue would be to examine how different blame avoidance strategies play out for different groups of voters. The results of such experiments would contribute to the much-needed development of a theory of blame avoidance in social policy reform.

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**Table 1. Measuring the employment and success of blame avoidance strategies**

BLAME AVOIDANCE STRATEGIES' EMPLOYMENT	
Step 1: Identify three dates for each reform (proposed, decided, implemented)	Is there manipulation of payoffs in terms of timing?
Step 2: Is reform part of package or not?	If yes, manipulation of procedures
Step 3: Assess reform's target group(s)	The higher the degree of targeting, the higher the indication of manipulation of payoffs
Step 4: Assess if voters' perceptions manipulated	Examine the argumentation given for the reform by the political actor proposing it, e.g. in bill proposals, press statements, and newspaper articles
BLAME AVOIDANCE STRATEGIES' SUCCESS	
Compare approval ratings before and directly after the reform (for assessing effect of manipulating payoffs and manipulating procedures);	
Compare approval ratings before and after the reform, when the political actor's manipulation perception strategy has stopped (for assessing effect of manipulating perceptions; use information from step 4 above to know when this strategy's employment has ended).	

## APPENDIX

**Table A1 Categories of blame avoidance strategies**

<p><b>Manipulating procedures</b></p>	<p><i>Insulation</i>: Delegate decision-making power to another body (e.g., court, regulatory agency);</p> <p><i>Passing the buck</i>: Delegate detailed decision-making power to another body, but constrain its options so that it will have to impose losses while shouldering the blame for doing so;</p> <p><i>Agenda limitation</i>: Keep loss-imposing actions from being taken openly (e.g., by bundling them with other legislation).</p> <p><i>Organisational strategies</i>: Plan a reform intelligently (Wenzelburger 2011).</p>
<p><b>Manipulating perceptions</b></p>	<p><i>Obfuscation</i>: Use technical changes or other mechanisms to lower visibility of loss-imposing actions (see Pierson 1994);</p> <p><i>Finding a scapegoat</i>: Blame loss-imposing action on another actor (e.g., courts, a previous government);</p> <p><i>Circling the wagons</i>: Achieve a consensus among all major policymakers before a loss-imposing initiative is announced;</p> <p><i>Redefining the issue</i>: Portray loss-imposing action in a new way that mobilizes on its behalf previously un-mobilized beneficiaries of that action and/or those with no direct stake in it;</p> <p><i>Justification</i>: Try and convince the voters that the reform is needed and just (Green-Pedersen 2002);</p> <p><i>Damned if you do, damned if you don't</i>: Try and manipulate the domain of the voter so that the gains domain is reframed into a losses domain, making plausible that no matter which party or government rules, the reform will take place because the status quo is untenable (Vis and Van Kersbergen 2007);</p> <p><i>Strategic re-framing</i>: Re-frame an originally unpopular reform into a “popular” one, hence turning the reform into a potential vote-winner (Elmelund-Præstekær and Emmenegger 2013).</p>

	<i>Strategic communication</i> : Phrase the reform such that the changes of electoral punishment are minimized (Wenzelburger 2011).
<b>Manipulating payoffs</b>	<p><i>Dispersion</i>: Keep level of losses low and broad enough or disperse over a long time period, so that opposition lacks incentives to mobilize;</p> <p><i>Compensation</i>: Provide sufficient compensation to specific categories of potential losers so as to mitigate or dispel their opposition (cf. Pierson 1994);</p> <p><i>Exemption</i>: Exempt enough specific categories of opponents of loss-imposing action to split and weaken opposition coalition (cf. Pierson’s 1994 division strategy);</p> <p><i>Concentration</i>: Impose losses on groups that are politically weakest or viewed least sympathetically by others and, thus, unlikely to build a broad coalition against loss-imposing action (Pierson’s 1994 division strategy);</p> <p><i>Creative accounting and lies, damn lies and statistics</i>: Try and redefine the terms according to which the outcomes are measured that are feared to have negative consequences to change the domain of voters from one of gains into one of losses (Vis and Van Kersbergen 2007).</p> <p><i>“Automatic” retrenchment</i> (Weaver 1988)</p> <p><i>Delaying the effects of the reform</i>, or strategic timing (Bonoli and Palier 2007)</p>

*Source*: Pal and Weaver (2003: 28-29, table 1-4); the blame avoidance strategies in table A1 including a reference were added by the author.