ELECTION CAMPAIGNS & WELFARE STATE CHANGE

Democratic Linkage and Leadership Under Pressure

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STAFFAN KUMLIN
ACHIM GOERRES
Till Liv och Elsa
Für Anna, Alexander und Andrea
At the end of a long project, it can be hard to remember exactly how it started. But we do recall our first meeting over lunch in a sunny Pisa square during the 2007 General Conference of the European Consortium of Political Research. We were survey researchers with a micro-level focus, but also shared a broader interest in the politics and policies of European welfare states. Further meetings and exchanges turned into concrete cooperation plans and we first discussed the possibility of this book in 2012. Almost ten years have passed and ‘the book’ accompanied us as we navigated through project applications, data collections, career shifts, moving between universities, parental leave, teaching obligations, the chairmanship of a department, family life, personal losses, and, in 2020–22, the Covid-19 pandemic with its challenging demands on university teachers and parents. With so much water having passed under the bridge, it is now difficult to know exactly whom to thank. We know that we are indebted to many institutions and individuals but apologize to those we somehow forgot.

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Oslo and Duisburg, November 2021
Staffan Kumlin
Achim Goerres
# Contents

*List of Figures*  
List of Tables  

## I Research Problems and Theoretical Framework

1. Introduction: Democracy and Welfare State Change  
2. Democratic Linkage and the Party Decline Debate  
3. Democratic Leadership and the Changing Study of Changing Welfare States  

## II Campaign Contents

4. Up and Down with the Welfare State: Systemic Agenda Shifts in Europe  
5. What Politicians (Don’t) Tell You about Welfare State Change  

## III Public Responses

6. What Makes People Worry about the Welfare State?  
7. Who Persuades and Who Responds?  
8. Do People Adjust Policy Preferences to Reform Pressures?  

## IV Conclusions

9. Democracy and Welfare State Change Revisited  

*Bibliography*  
*Index*
List of Figures

4.1. Election campaign themes in 18 countries, 1977–2010 (%) 77
4.2. The welfare state domain as election campaign theme (moving averages) 78
4.3. Welfare state campaign themes in one and both journals 79
4.4. The welfare state domain as an election campaign theme across welfare regimes 82
4.5. Simultaneous salience of selected themes (in all campaigns and in campaigns where welfare state themes were salient) 83
4.6. The development of abstract campaign themes and concrete policy areas (moving averages) 85
4.7. Policy areas as campaign themes and sub-issues 87
4.8. The development of pensions, health care, and elder care (moving averages) 88
4.9. The development of campaign themes and sub-issues related to public services and cash transfer systems (moving averages) 89
4.10. The development of retrenchment/austerity and social investment related themes and sub-issues (moving averages) 90
6.1. Predicted marginal effects of the EU immigration frame versus control, and non-European/non-Western immigration, across levels of support for government responsibility for providing a reasonable standard of living for immigrants 138
7.1. Effects of experiment 2 treatments in different voter groups 153
7.2. Treatment effects compared to control group and moderating political attitudes 154
7.3. Predicted effects of treatment on attitudes towards family policy (1–7) moderated by party choice at the previous Bundestag election 161
7.4. Predicted effects of information treatment moderated by general welfare state support, DV: support for families themselves 162
8.1. Graphical representations of structural equation models estimated in the chapter 174
List of Tables

5.1. Fourteen thematic codes related to reform pressures and opportunities 101
5.2. Reform pressures and opportunities themes across three time periods between 2000 and 2010 102
5.3. Salience of types of policy responses in the context of the welfare state 105
5.4. Bivariate analysis of reform pressures and opportunities and their links to policy responses at different levels of electoral popularity 108
5.5. Fifteen thematic codes related to normative values and outcomes 111
5.6. Codings of welfare state reform pressures, normative outcomes and values and their links to policy responses 112
6.1. Treatments and experimental groups 130
6.2. Means for all respondents on the seven sustainability items, and the sustainability index 131
6.3. OLS regression models of the perceived welfare state sustainability index (b-coefficients with p values in brackets) 133
7.1. Treatment groups in experiment 2 in Norway in 2015 149
7.2. Effects of experiment 2 treatments on perceptions of welfare sustainability in Norway in 2015 152
7.3. Treatment groups related to concrete pressures in experiment 3 (family policy) in Germany in 2015 158
7.4. Treatment effects on family policy support index (1–7) 160
8.1. Sustainability index, means, and standard deviations at two time points in Norway and Germany 175
8.2. Aggregate changes in five aspects of welfare state support in Norway 2013–15 and Germany 2015–16 177
8.3. Intra-individual correlations on the sustainability index and five attitudes towards the welfare state in Norway 2014–15 and Germany 2015–16 178
8.4. Model 1, cross-lagged path models of six welfare state support variables, Germany 2016–15 179
8.5. Model 2, cross-lagged path models of six welfare state support variables with moderating effect, Germany 2015–16 181
8.6. Model 1, cross-lagged path models of five welfare state support variables, Norway 2014–15 182
8.7. Model 2, cross-lagged path models of five welfare state support variables with moderating effect, Norway 2014–15 182
PART I

RESEARCH PROBLEMS AND THEORETICAL FRAMEWORK
Introduction
Democracy and Welfare State Change

For several decades, mature welfare states in Europe have been on their way into a phase of austerity, marked by increasing demands and smaller, more insecure, revenues. A host of seemingly disparate reform pressures have gradually called into question the economic sustainability of social protection and services. The usual suspects include economic internationalization, which may trigger tax competition, capital flight, or redirect investment to emerging economies. Population ageing increases the proportion of people using pensions and health services, while fewer work and pay taxes. Public finances are further hurt by persistent unemployment (working-age adults who cannot find work) together with low employment (working-age adults not on the labour market). Periodic economic crises—such as ‘the great recession’ beginning in 2008—raise unemployment and benefit reliance in the short term, while scarring individuals and human capital in the long term. Meanwhile, changing family patterns, gender equality, and in particular female labour market participation alleviate these problems but also produce new trade-offs, for example between older social protection and better dual-earner policies. Finally, increasing levels of low-skilled immigration, not least in the wake of the 2015 refugee spike, raise the number of individuals with poor education and language skills generating further needs and potentially competition with other legitimate needs.

In this book, we investigate if and how political leaders publicly debate welfare state reform pressures and reforms at election time, and how citizens respond and draw political conclusions from such debate. At a more general level, we wonder what the answers to these questions reveal about the causes of welfare state change and about the nature of representative democracy in the early twenty-first century.

One rationale for raising these questions is that mature welfare states are changing. This was, until recently, far from obvious. Instead, welfare state researchers long tended to find policy stability despite the formidable challenges.
Studies in this vein often relied on Paul Pierson’s (1994, 1996, 2001) theory of a ‘new politics of the welfare state’ (shorthand: NPWS) (for overviews, see Levy 2010; Patashnik 2015). NPWS uses institutional theory to explain why political actors typically find it easier, cheaper, and more rational to stay close to long-trodden policy paths. It also emphasizes how parties and politicians think twice about welfare reform because of strong public support for already established policies. Policy change is occasionally possible, but mainly if coupled with ‘blame avoidance’ strategies that conceal what is going on and the political responsibility for it. A related idea is that multiple pressures in the new ‘era of permanent austerity’ generate ideological depolarization between left- and right-leaning parties. Most actors, regardless of ideology, must now simultaneously consider both the popularity and inertia of the welfare state and indisputable reform pressures. As a result, political parties advance increasingly similar and at best cautious reform agendas.

These ideas long seemed largely correct. No dramatic ‘race-to-the-bottom’ was (or is) in sight in most mature welfare states. Rather, policy changes were at first glacially slow and could be understood as institutionally path-dependent developments without radical breaks from past practices. In recent years, however, scholars documented how mature welfare states have begun to change more quickly and in more fundamental ways (see van Kersbergen and Vis 2014; Beramendi et al. 2015; Manow, Palier, and Schwander 2018). This process began in the late 1990s, gained momentum in the early 2000s, and was accelerated in several countries by the multiple crises experienced in Europe since 2009. Crucially, policy change appears multidimensional: it comes both as ‘neoliberal’ retrenchment (i.e. as benefit cuts and austerity policies), but also as less destructive, sometimes even expansive reforms in certain areas. This is captured by increasingly popular concepts such as ‘recalibration’, ‘social investment’, ‘active labour market policy’, and ‘dual-earner policies’, terms which we shall return to.

Anton Hemerijck, in Changing Welfare States (2013), juxtaposes these trends and the scholarly challenges they pose:

the wide-ranging post-formative welfare reform momentum, with significant domestic variation, adds up to a broad, cumulative welfare-state (self-) transformation across the Member States of the European Union ... contrary to Paul Pierson’s conjecture of change-resistant welfare states ... the majority of European welfare states have, interactively, made complementary reforms across macroeconomic policy, industrial relations, taxation, social security, labour market policy, employment protection legislation,
pensions, social services, welfare financing, and social and employment policy administration.

(Hemerijck 2013: 34–5)

Not only are these changes more fundamental and widespread than anticipated. Hemerijck (2013) also argues that they force us to reconsider how politicians and citizens respond to pressures operating on welfare states.

we are in dire need of an alternative analytical perspective that allows a better and nuanced understanding of these more positive, multidimensional, and dynamic trajectories of social reform. ... As we observe more profound changes on the output side of the dependent variable of policy responses, we are confronted with a theoretical quest.... What we are looking for in the first place is a theoretical perspective that is more dynamic, and better able to gain leverage on social policy innovation and institutional transformation across time. Second, and most important, such a dynamic perspective should be able to conceptualize policy actors as more open and responsive to adaptive challenges.

(Hemerijck 2013: 40–1)

Our book heeds this general call in specific ways. We investigate how political leaders and the public respond to reform pressures during a crucial period in a mass democracy: the election campaign. Do campaigns facilitate debate and attention to welfare state challenges? Do political parties present citizens with distinct choices as to how challenges might be met? Do political leaders prepare citizens for the idea that some solutions may be painful and unpopular? Do campaigns have adaptive consequences for how the public perceives the economic need for reform? Do citizens adjust their policy preferences as a result?

To address these questions, we have assembled a number of primary data sources:

- A data set covering 172 election campaigns in 18 European countries across three decades (EU15+ Norway, Iceland, Switzerland, 1977–2010). These data offer information about dominant campaign themes throwing light on the changing character of campaigns.
- Eighteen party leader speeches from the major left- and right-leaning parties in election years in Germany, Norway, and Sweden in the 2000s. These speeches, which comprise some 100,000 words of carefully formulated party messages under heavy media attention on the threshold to
an election year, reveal whether leaders publicly debate reform pressures and propose policy solutions that are distinct from those of other parties.

- A series of survey-embedded experiments gauging how political messages about reform pressures affect citizens’ perceptions of welfare state sustainability in Germany, Norway, and Sweden.
- Panel surveys in Germany and Norway with waves collected between 2014 and 2016, allowing longitudinal analysis of how policy preferences along relevant dimensions are in turn affected by perceptions of welfare state sustainability.

Welfare state change and democracy: intertwined research problems

Our empirical results inform two broad and intertwined research problems. First, we want to understand the role of election campaigns in processes of welfare state change. What we are after, however, is not a straightforward estimation of ‘campaign effects’ on policy. For this we can rely on existing theory and research. Several studies clearly suggest that welfare reforms of different kinds become more likely as political systems pay greater collective attention to reform pressures and policy solutions. Taking a quantitative example, Jakobsson and Kumlin (2017) use time-series cross-section data and find that retrenchment in recent decades is more likely after election campaigns in which at least one welfare state related issue dominated the public sphere. Taking a more qualitative example, Schmidt (2002) followed six countries intensely. Focusing on a diverse set of reform types, she concludes that reform is more easily triggered in contexts with a pervasive, and often more public, reform discourse. Such discourse can advance new ‘causal’ ideas at odds with established institutional practices, interests, and ideologies favouring the status quo. In Schmidt’s (2002: 169) formulation, ‘discourse, understood as whatever policy actors say to each other and to the public more generally in their efforts to construct and legitimate their policy programs, is the missing element in the explanation of policy change in the welfare state’. She concludes that

[countries managed more or less successfully in their adjustment to the external economic pressures ... not only because of their greater or lesser economic vulnerabilities, their greater or lesser institutional capacities, and their better or worse policy responses but also because of their more or less convincing legitimating discourses.

Schmidt (2002: 190)
Other scholars have developed the theory behind discourse effects on policy change. For example, Baumgartner, Jones, and Wilkerson (2011) emphasize how not only citizens, but also policymakers, operate under severe ‘attention scarcity’ such that policy changes occur earlier and to a greater extent in problem areas that actors devote more attention to throughout the political process (Baumgartner et al. 2011; see also Kingdon 2011 [1984]). Further, attention to problems is not only a scarce, but also highly dynamic resource. Attention can change more quickly compared to other important but inert factors such as values or institutions. Put differently, attention to problems is the key ‘moving part’ for understanding policy change (Baumgartner et al. 2011: 952).

While we contribute to research emphasizing discourse and attention in welfare reform, we also believe a crucial component is missing in this literature. Put simply, our contribution is to ask if campaign and discourse effects arise through democratic mechanisms. This leads to our second research problem, which concerns the quality of representative democracy in an era of challenges and resource scarcity. Can campaigns, and their constituent actors, respond to reform pressure while adhering to key democratic principles? What are these principles? What sort of observations would get us closer to answers? Democratic values are of course contested and not easily operationalized. Still, we hope to demonstrate the analytical leverage in identifying certain broad, but observable, principles most of us hope are not compromised even as pressures mount and welfare states begin to change.

We use the concepts of ‘democratic linkage’ and ‘democratic leadership’ as structuring devices. These are two ‘visions’ (Powell 2000) for what good political representation is and how it can be achieved. In this book, they function specifically as models for how political parties and citizens could and should communicate in campaign contexts.¹

Now, most readers will probably agree that understanding the nature of representative democracy is interesting in its own right. What is more, however, these models inform our first research problem, that is, understanding processes of welfare state change. As we shall see, the models specify possible ways in which leaders and citizens may publicly adapt to, and communicate about, welfare state challenges and solutions. Hence, the models help us specify key democratic mechanisms through which campaign discourse may explain welfare state change.

¹ In other words, we will not examine all possible facets and implications of these models but rather concentrate intensely on a smaller number of key implications for the book’s research problems.
Chapters 2 and 3 will revisit the notions of democratic linkage and leadership in detail. Chapter 1 will now give a first flavour of these chapters and indicate our contributions to current research. The remainder of Chapter 1 then samples highlights from the empirical chapters, discusses limitations inherent in our data, and finally foreshadows the concluding chapter.

Democratic linkage and the party decline debate

Democratic linkage is about the ability of electoral democracy to channel citizens’ policy preferences into post-election policy. The linkage model envisages political parties presenting distinct and future-oriented policy platforms, addressing which societal problems now deserve attention while also proposing policy solutions. Citizens, for their part, use this information to develop informed perceptions of party differences and their own policy preferences. In turn, this allows them to vote for the party offering the best match. After the election, governing parties are honest and cohesive enough to let the policy mandates they asked for in the campaign translate into actual policy.

What explanation of welfare state change is implied by the democratic linkage model? A key implication is that campaigns in general, and political parties in particular, have increasingly put reform pressures on the agenda as these have become severe and consequential for policy. What is more, parties have told citizens which policy solutions will address growing challenges. Equally importantly, the problem/solution packages offered by parties are distinct from each other, allowing meaningful democratic choice in the face of outstanding challenges. Citizens, for their part, have the ability to use the information they receive to form their own views about reform pressures and—crucially under the ‘linkage’ model—adjust their prospective policy preferences.

Chapter 2 draws on a debate over whether political parties are losing their ability to provide democratic linkage. We note dramatically different views on the extent of party decline in this regard. The most pessimistic voices argue that dwindling party membership, more volatile and heterogeneous voters, and more complex conflict structures, make it harder for parties to link voter preferences with policies. By contrast, the most optimistic voices claim that even traditional mainstream mass parties reinvent themselves by developing their polices in the light of new societal challenges. Meanwhile, they also become better and more active in using modern election campaigns as a tool for communicating their problem–policy packages. This compensates for weakening traditional organizational and membership-based mass party linkage mechanisms.
A key contribution of this book is to analyse in detail the specifics of welfare state pressures and policy changes, that is, if/how such specifics are communicated to citizens, with which intensity, and with which effects. This sets our study apart from much research that still conceives of political conflict in very overarching terms; often this entails measures like general left–right self-placement among citizens, and broad measures of social spending to tap policy. This does not necessarily reveal which underlying pressures citizens are confronted with (if any), or which policies they are informed about (if any). Both of these components—salience of real-world problems and actual reform—is necessary to fully understand linkage in pressured welfare states where a complex landscape of problems and reform trajectories has opened up.

A further contribution is data related. In the words of Green-Pedersen and Jensen (2019: 805): ‘we have almost no knowledge about what parties actually focus on when they address their would-be voters within the realm of the welfare state.’ Admittedly, this is a drastic generalization, and we will discuss a number of exceptions along the way (see Busemeyer, Franzmann, and Garritzmann 2013; Green-Pedersen 2019; Green-Pedersen and Jensen 2019). On closer inspection, however, existing studies are not only few but often limited to measuring the issues parties discuss in their written party manifestoes. While such documents offer important windows into party competition generally, they are by definition less useful in revealing exactly what reform pressures and policy solutions citizens hear about in public campaign settings. Our data take us closer to such public campaign attention. Additionally, our experiments gauge how citizens’ problem perceptions and policy preferences respond to information they are likely to encounter.

Democratic leadership and the study of changing welfare states

A good elected politician does more than diligently implement citizens’ policy preferences. As Pitkin (1967) and other democratic theorists have argued, we want politicians who sometimes dare to defend unpopular but, as far as leaders can judge, sensible decisions while seeking to legitimize these. Influential scholars even suggest that such top-down democratic leadership is becoming more important in tandem with an alleged decline in democratic linkage.

Democratic leadership, then, requires daring—rather than blame-avoiding—politicians who, at least in principle and on occasion, have the courage to argue publicly that big challenges necessitate unpopular policies. Furthermore, democratic leadership also places demands on those who are led. Citizens are, at least in principle and on occasion, willing and able to listen. Leadership is compromised if citizens do not even in principle and on
occasion have a capacity for accepting explanations made by democratic leaders. Leadership will not work if citizens can never readjust their perceptions of underlying challenges while at least accepting that they cannot have their prospective policy preferences satisfied.

Can accelerating welfare state change be explained by democratic leadership? The first half of Chapter 3 describes how older welfare state scholarship assigned a limited role to public sphere communication. From this vantage point, welfare state development was never, and is still not, due to broad open debate and ultimately policy changes in the face of popular preferences reshaped through such processes. This is true for a broad school of thought often labelled as ‘institutional’ theory. Pierson’s (2001) ‘new politics’ framework is one example: it implies that political communication is seriously flawed. Politicians refrain from talking about uncomfortable pressures (unless there is a culprit to blame). Democratic linkage is compromised by ideological depolarization at the same time as democratic leadership will not work due to citizens’ inability to let go of the status quo. This, in turn, is what forces policymakers to engage in blame avoidance rather than daring leadership.

Accelerating welfare state change, however, has challenged traditional welfare state scholarship. A growing body of work now suggests that leaders may develop new ideas about the welfare state and communicate to a greater and more consequential extent than older theories imply. A number of discourse-oriented concepts—examples to be discussed include ‘credit claiming’ (Weaver 1986; Bonoli and Natali 2012), ‘strategic reframing’ (Elmelund-Præstekæ and Emmenegger 2013), and—particularly useful here—‘ideational leadership’ (Stiller 2010)—have gained currency in welfare state change research. This emerging literature goes beyond blame avoidance and suggests that parties may proactively put reform pressures on the public agenda, explain to citizens why choosing partly painful reform may be both economically smart and partly defensible with normative arguments. The latter arguments link reform pressures and solutions to ideas about fairness and ‘deservingness’ that the audience holds. The extent, nature, and consequences of such leadership, however, is currently less than clear. Past studies tend to concentrate on elite discourse itself rather than public communication. Alternatively, analysis is limited to dramatic cases or even anecdotal evidence about the contents and consequences of public discourse.

A parallel body of new findings concerns citizens. Their attitudes and behaviour now appear more ambivalent and malleable than previously appreciated. True, welfare state support appears relatively stable and strong. At the same time, electoral punishment for retrenchment is weak and contingent
INTRODUCTION

Case studies even suggest that politicizing pressures and championing retrenchment (sometimes in combination with more expansive policies) can be a road to electoral victory (Elmelund-Præstekær and Emmenegger 2013). Other studies report a readiness among citizens to react to some types of reform pressures (Naumann 2014, 2017; Jensen and Naumann 2016). Our empirics will allow progress in gauging the extent to which citizens are susceptible to information about reform pressures, as well as the types of normative arguments that may open the door to such influences.

A particular point made in recent work is that retrenchment is no longer the ‘only game in town’ (van Kersbergen, Vis, and Hemerijck 2014). Welfare reform is no longer merely a unidimensional struggle between the status quo and destructive cuts (Bonoli and Natali 2012; Häusermann 2012). Scholars have documented an ideational shift towards a “social investment” oriented welfare state (Morel, Palier, and Palme 2012; Hemerijck 2018). Concrete policy examples of this shift include expansive dual earner reforms in child care and parental leave as well as a host of activation policies meant to preserve and generate human capital on the labour market. Overall, what we will refer to as the social investment/activation turn builds on the promise that the welfare state is not just a problem to be downscaled, but is also part of the solutions that will alleviate reform pressures. Relatedly, the menu of policy responses is now longer and less exclusively destructive—and unpopular—than older theories imply.

This complex landscape of policy solutions generates key questions for this book. Has the social investment/activation turn—which is apparent in ideational and policy trends—also ‘gone public’? It may have, in part because it allows politicians to debate pressures while having something more popular to propose than only retrenchment. Perhaps it has even permeated public debate to the extent that it masks more unpopular policy? If so, the social investment/activation paradigm may function as a vehicle for blame avoidance and an obstacle for true democratic leadership.

Empirical chapters at a glance

Let us take a brief look at the empirical chapters. These chapters are divided into two sections: one that examines messages and agendas that emanate from elite actors in campaigns, and one that studies citizens’ reactions. Let us consider each in turn.
Chapter 4 analyses ‘systemic agendas’. Older research on the welfare state, we will note, has often promoted a somewhat reductionist view of elections, seeing these mainly as instruments for aggregation of exogenous preferences rather than for deliberation and preference change. Thus, as Chapter 4 will explain, much welfare state research has studied the policy preferences of specific actors, such as political parties and citizens. We know much less about policy agendas, that is, how prioritized and salient welfare issues are compared to other policy domains. In particular, this is true for the question of how much overall attention is being paid to welfare state issues in election campaigns. Do welfare issues ever dominate an election campaign? Have they become more or less dominant over time? Answers to these questions are crucial if we want to better understand the role played by election campaigns in welfare state reform (and better assess its democratic character).

Chapter 4 draws on recent work suggesting the meaningfulness of a ‘systemic’ approach to agenda-setting. We examine if welfare state issues become more—or perhaps less—likely to dominate entire election campaigns over time as most welfare states have delved deeper into the era of growing pressure for change. To the extent that there has been an attention increase, what about its timing? Have we witnessed a gradual increase in attention (as welfare states have experienced gradually mounting pressure)? Or have we rather seen a late and brief attention response to an ‘era of permanent austerity’ that really began in the early 1980s? The late-and-brief reaction, Chapter 3 will explain, is implied by theories of ‘punctuated equilibrium’ (Baumgartner et al. 2009) and ‘attention cycles’ (Downs 1972).

Chapter 4 also begins to analyse two sets of questions that cut through several chapters. One is about blame avoidance. Is welfare state debate a ‘fair-weather sport’ that was mainly exercised some time ago when pressures were less severe? Alternatively, perhaps we find such debate precisely during major economic crises because it can serve as a scapegoat for unpopular reforms? A second set of questions are about the social/investment activation turn. Have the well-documented elite- and policy-related shifts in this direction also shaped campaigns? Has social/investment activation even take over attention from less popular policies such as retrenchment?

By the end of Chapter 4 we hope to have convinced the reader that studying systemic agendas is worthwhile and can produce key insights. Yet, crucial questions cannot be answered using the systemic approach; these instead demand disaggregation and detailed analysis of ‘meso-level’ party messages.