The Impact of Partisanship in the Era of Retrenchment: Insights from Quantitative Welfare State Research

Abstract

Does government partisanship matter when it comes to the size and generosity of the welfare state? While the answer to this question is clearly positive for the 'golden age', there is so far no clear-cut answer with regard to the subsequent era of welfare retrenchment. This is by no means due to a lack of research. Quite to the contrary, a substantial number of macro-quantitative studies published over the past 15 years have addressed this very question. What is obviously missing so far is a comprehensive and systematic summary of this work which a) presents the main insights of existing research and b) identifies prospects for future research. The former goal is achieved by grouping 54 empirical studies and the incorporated statistical tests along the lines of the dependent variable as well as individual welfare programs. The main insights are that partisan effects on social spending have declined and even vanished over the course of time while the impact of partisanship persists when we turn to the more sensitive measure of welfare entitlements. Notably, the latter finding does not apply to life-course related welfare programs like pensions but is limited to class-related welfare programs like unemployment benefits.

Concerning the second goal of formulating research prospects, welfare scholars have recently raised a number of methodological issues which serve as excellent starting points for future research. First, a comparison of the most prominent entitlement datasets shows that researchers have to be (more) conscious about choosing data which match their conceptual framework. Second, future research may profit from using more dynamic concepts of partisanship. Using time-variant values of party positions can yield additional insights about the role of parties, e.g. help us to understand if programmatic convergence or external constraints are at the bottom of declining partisan effects. Third, there is fresh evidence that standard panel data analysis discriminates against partisan variables. Shifting the focus from country-years to political entities like cabinets might challenge and even alter the findings on the non-existent impact of parties on social spending.

The Impact of Partisanship in the Era of Retrenchment: Insights from Quantitative Welfare State Research

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„Partisan effects on a whole array of welfare state indicators declined in the 1970s compared to the Golden Age, and they disappeared virtually entirely in the 1980s" (Huber/Stephens 2001: 220).

„Contrary to claims that partisanship has little impact on welfare state commitments, traditional partisanship continues to have a considerable effect on welfare state entitlements in the era of retrenchment" (Allan/Scruggs 2004: 496).

1. Introduction

The two initial quotations of leading welfare state scholars reflect the ongoing debate on one of the central questions of contemporary welfare state research: Does government partisanship matter when it comes to the size and generosity of the welfare state? While the answer is clearly positive for the 'golden age' of the welfare state (e.g. Hicks/Swank 1992; Huber et al. 1993; Huber/Stephens 2001), there is so far no clear-cut answer with regard to the subsequent 'silver age of permanent austerity' in which we are living. This is by no means due to a lack of research. Quite to the contrary, a substantial number of macro-quantitative studies published over the past 15 years have addressed this very question.

What is obviously missing so far is a systematic summary of this work which is needed to answer the question: "What have we learned?" The first objective of this article is to fill this void by sorting the literature and systemizing the relevant studies on the basis of sensible criteria. As we will see, grouping the studies and the incorporated statistical tests along the lines of the dependent variable as well as individual welfare programs helps to bring some order to an otherwise rather confusing picture. The thus revealed patterns can then be

interpreted on the basis of methodological as well as theoretical considerations. More recently, welfare scholars have begun to call attention to a number of methodological problems, with the focus shifting from the well-known 'problem of the dependent variable' to issues concerning the independent variable, i.e. the conceptualization and measurement of partisanship. The raised issues may challenge the validity of the just gained insights, which is why they have to be taken seriously. Consequently, the second objective of this article is to present the most pressing methodological issues and to outline how they can be confronted in future research.

The plan of the article is straightforward: The first section outlines the selection process and presents a first overview, including a list of 54 studies which fulfilled the selection criteria. The subsequent section takes a closer look at those studies and presents the central insights of the existing research. In the final section, we turn to recently raised methodological issues and potential solutions.

2. Quantitative Studies on Partisan Effects in the Silver Age

Although a comprehensive and systematic summary of the quantitative research on partisan effects after the golden age is missing so far, a number of studies offer first insights. The meta-analysis on left-right party ideology and government policies by Imbeau, Pétry and Lamari (2001) includes 23 (out of a total of 43) studies which test for the effect of partisanship on some kind of welfare program. The analysis covers a period of more than four decades, reaching from 1950 to 1992. Distinguishing a pre-1973 and a post-1973 period, the authors show that the originally modest partisan effects declined in the latter period (ibid.: 19-20). Kittel and Obinger (2003) concentrate on studies focusing on the political determinants of social spending, including 16 studies published from 1992 to 2001. Most of those studies identify statistically significant partisan effects, but again the golden age constitutes a large part of the years covered in the selected studies. Finally, Horn (2012) offers a more recent

review. Focusing on twelve studies which mainly cover the silver age, he shows that the empirical evidence is rather inconclusive for this period but that the choice of different dependent variables – expenditure or entitlements – may be accountable for this result. While identifying many of the main studies on partisanship in the retrenchment era, the study clearly lacks comprehensiveness, excluding a large amount of studies testing for the impact of government complexion.

In order to fill this gap and identify as many relevant studies as possible, we proceeded in a two-stage process. First, empirical studies including macro-quantitative analyses on partisanship and the welfare state published since 2000 were isolated from the large amount of welfare state literature by (a) an extensive literature search via 'web of science'[1], and (b) utilizing the thus identified literature as a starting point for a bibliographical search applying cross-referencing techniques. In a second step, all studies that failed to meet at least one of the following criteria were excluded:

1. The study was published in a peer-reviewed English-language journal, thus excluding monographs and contributions to edited volumes.

2. The period under investigation starts not earlier than 1973 (first oil shock as starting point of the retrenchment era) or contains separate analyzes for the post-1973 period. Additionally, the analyzed period reaches at least until the mid-1990s and thus covers a sufficient part of the retrenchment era.

3. The analysis includes at least twelve countries and focuses on advanced Western welfare states, thus excluding studies that focus exclusively on regions like Latin America or East Asia.

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[1] The search was based on combining 'welfare keywords' ("welfare state", "welfare retrenchment", "social spending", "welfare generosity", "unemployment benefits", "health * spending" etc.) and 'party keywords' ("parties", "partisan*", "ideology").

4. The analysis centers on social spending (and not public spending as a proxy) and/or some indicator of welfare generosity as dependent variable. In doing so, the study covers the welfare state on the aggregate level or at least one of the 'classical' welfare programs which account for the lion's share of social spending: unemployment benefits, health care, pensions.

5. The analysis actually tests for partisan effects *after* the golden age and not for 'legacy effects', i.e. cumulative cabinet/seat/vote shares after World War II.[2]

The application of this filtering process reduces the number of studies to 54[3], with 25 of those studies treating partisanship as their main or one of their main explanatory factors (see Tab. 1). In total, the selected studies contain 88 separate tests on partisan effects. Focusing solely on column five, we see that an inconsistent picture emerges. Out of the 88 tests, 31 (35.2 percent) find significant partisan effects in the expected direction, whereas 52 tests (59.1 percent) show no partisan effects. A minority of five statistical tests (5.7 percent) even identifies reversed partisan effects, i.e. according to those tests left parties retrench the welfare state or single welfare programs more than their right-wing opponents, pointing to a 'Nixon goes to China' logic (Ross 2000). Restricting the analysis to the studies with a more or less explicit focus on partisanship alters the picture in favor of the 'parties matter' hypothesis. In this case, half of the tests (18 out of 36) find the expected partisan effects while 16 tests are negative (44.4 percent) and two tests diagnose reversed partisan effects (5.6 percent). This divergence can probably be explained by the application of more sophisticated analytical techniques which allow for the identification of more subtle partisan effects.

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[2] While such indicators are reasonable measures to test for the impact of partisan hegemony (Huber/Stephens 2001), their application is not adequate to answer the question if political parties make a difference in the retrenchment era.

[3] A list of studies excluded from this summary due to failing to meet at least one of selection criteria can be found in the appendix file.

- Table 1 -

3. 15 Years of Research: What We Have Learned

A closer look at Table 1 reveals that things are not as inconclusive as the first assessment indicates, but that a lot more can be learned from the existing research. The table shows that the studies vary with regard to the chosen dependent variable as well as the analyzed welfare programs. Given the importance attributed to the dependent variable in the welfare state literature (Green-Pedersen 2004; Clasen/Siegel 2007) as well as supposed differences between welfare programs, grouping the studies along those lines promises to be a fruitful task.

- Table 2 -

3.1 Partisanship and the Dependent Variable

Let us first take a look at impact of the choice of the dependent variable. The studies can be split into two camps. One type of studies uses the classical measure of social spending, i.e. either aggregate spending or spending on individual welfare programs. Based on the insight that "it is difficult to imagine that anyone struggled for spending *per se*" (Esping-Andersen 1990: 21), the other type of studies relies on measures of welfare generosity, generally replacement rates or some kind of generosity index that includes additional information. A limited number of studies test for both types of indicators. As Table 2 demonstrates, the choice of the dependent variable makes a substantial difference. While only six out of 50 tests based on social spending find significant partisan effects, an entirely different picture emerges when turning to studies which focus on entitlements. Here, almost two-thirds of the conducted analyses show that parties still matter. This pattern is exemplified by the studies of Amable et

al. (2006) and Jensen (2011c, 2012a) which find no significant partisan effects on social spending but on replacement rates.

What accounts for these remarkable differences? In order to answer this question, it is helpful to reflect on the factors which influence both indicators. Replacement rates as well as most other factors which affect the generosity of welfare programs are directly influenced by political decisions, i.e. changes are generally the product of reforms.[4] In contrast, social spending levels are to a much lesser extent determined by purely political factors, since the demand for welfare benefits also depends on economic as well as demographic factors. To give one example, spending on unemployment benefits will generally rise during economic crises, whereas nominal replacement rates will not be affected unless the government implements changes. What is more, social spending is generally measured as percentage of GDP which is itself affected by economic trends. All of this implies that partisan effects on the generosity of welfare programs do not automatically translate into similar effects on spending levels. In other words, welfare entitlements are much more sensitive to partisan effects than social spending.

While the results on entitlements demonstrate that the impact of partisanship has not disappeared, the fact that the negative findings on social spending diverge from the results of older studies on the golden age, which almost unequivocally show strong partisan effects using the identical measure, clearly indicates that partisan effects have declined in the silver age. Tests for time effects as well as interaction effects provide further proof for the declining relevance of partisanship on the expenditure level (see Tab. A1 in the Appendix). Eleven out of the 54 studies also test for changes *within* the retrenchment era, generally by including tests on sub-periods. Such a consideration of the temporal dimension promises to offer valuable insights, as the impact of partisanship will hardly disappear overnight but rather recede in the

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[4] In contrast to nominal replacement rates, net replacement rates can also deteriorate due to political inaction, e.g. if benefits are not raised in line with wages ([author]).

advance of the retrenchment era. This trend of gradual decline of partisanship, which was first highlighted by Huber and Stephens (2001), is confirmed by all but one of the studies (and all studies concentrating on social spending). One prominent explanation for this gradual decline is that partisan governments are more and more restricted by socioeconomic factors like globalization and fiscal stress. This argument is corroborated by the findings on interaction effects. Thus, a number of studies demonstrate that partisanship in the retrenchment era is conditional on the state of the economy (Amable et al. 2006; Jensen 2012a; Galasso 2014; Armingeon et al. 2016), globalization, i.e. the openness of the economy (Potrafke 2009; Kwon/Pontusson 2010; Jensen 2012a), and the strength of unions respectively corporatist settings (Kwon/Pontusson 2010; Jensen 2011e). According to these findings, the decline in partisanship regarding social spending can be seen as the logical result of advancing globalization and the universal decline in union strength (cf. Kwon/Pontusson 2010).

- Table 3 -

3.2 Partisanship and Individual Welfare Programs

Grouping the statistical analyses along the lines of individual welfare programs offers additional insights (see Tab. 3). When all tests, irrespective of the dependent variable, are taken into consideration the four categories show diverging patterns. While the partisan hypothesis is corroborated by a majority of tests on unemployment benefits and a substantial minority of the tests on health care indicators, the results on the aggregate level as well as pensions are clearly negative with an overwhelming majority of statistical analyses providing no proof for the prevalence of traditional partisan effects in the retrenchment era. The results for pensions are particularly notable, with almost a quarter of tests supporting the 'Nixon goes to China' argument. A more nuanced picture emerges when we include the dependent variable in our analysis. While the negative findings on the aggregate level are mainly driven

by the large amount of studies on social spending, the choice of the dependent variable has a fundamental impact on two of the other categories, namely 'unemployment' and 'health'. Nearly all of the tests on unemployment and health care spending fail to identify partisan effects. In contrast, the usage of generosity measures clearly corroborates partisan theory for those welfare programs. As stated above, this divergence apparently originates from the higher sensitivity of entitlement indicators for politically implemented changes.

Given the high sensitivity of generosity measures with regard to partisanship, the diverging patterns between unemployment and sickness benefits on the one hand, and pensions on the other are striking. A convincing explanation for this divergence is based on the distinction of class risks and life-course risks (Esping-Andersen 1999: 40-42). The former are risks like unemployment that are distributed unevenly among social classes, i.e. low income-earners face a higher risk than high income-earners, whereas life-course risks like old age affect all members of society in a similar way. Based on the historically founded assumption that left-wing parties are more reliant on working-class voters than right-wing parties, the former will be more reluctant to cut corresponding welfare programs than the latter, resulting in significant partisan effects (Jensen 2012a). Accordingly, those effects will be absent regarding life-course related social policies, since voters of all parties are affected by cuts to such programs. As seen, the findings summarized in the last columns of Table 3 are in line with these theoretical considerations – parties matter when it comes to unemployment benefits and sick pay but not to pensions.[5] However, even here the choice of the indicator is crucial, as demonstrated by Hicks and Freeman (2009). In their study, the reversed partisan effects identified for standard pensions disappear when turning to minimum pensions. In the light of the distinction between different risk categories, this does not come as a surprise since the latter are more important for low-income earners.

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[5] The results on the aggregate level support this explanation, since two of the three studies finding positive partisan effects, Korpi and Palme (2003) as well as Finseraas and Vernby (2011), do not include pensions in their aggregate measures.

Let us summarize what we have learned from the existing research: While the majority of studies do not find significant partisan effects, the systematic analysis offers a more differentiated picture, including three main insights. First, focusing exclusively on social spending, we can see that partisan effects have considerably declined since the end of the golden age, with time effects pointing to a gradual decline. Second, entitlements prove to be much more sensitive to partisan effects than social spending. This does not come as a surprise, as governments have a greater influence on the generosity of welfare programs than on spending levels which are strongly determined by socioeconomic factors. Third, parties matter with regard to welfare generosity but there are substantial differences between welfare programs. In line with theoretical expectations, parties matter with respect to class-related social policies like unemployment benefits but not with respect to life-course related social policies like pensions.

4. Methodological Issues and Potential Solutions

The previous section has shown that the existing research offers a number of valuable insights. However, more recently some scholars have pointed to a number of methodological issues which have to be taken seriously. Three of those issues stand out: (1) The supposed existence of a new form of 'dependent variable problem' concerning entitlement data, (2) an additional 'independent variable problem' which arises out of the dynamic nature of political parties and (3) the suspicion that standard panel data analysis discriminates against partisan variables. All three issues as well as potential solutions will be addressed in this section.

4.1 Entitlement Data: A New 'Dependent Variable Problem'?

In line with the presented findings, there is a growing consensus among welfare scholars that entitlement data are more appropriate than social spending data when looking for the impact

of political factors on welfare retrenchment (see contributions in Clasen/Siegel 2007).[6] However, when focusing on the entitlement side new problems arise. One concerns the construction of indices of welfare generosity, which represent one of the most popular ways to measure welfare retrenchment. The well-known decommodification index developed by Esping-Andersen (1990: 35-54) has been criticized on theoretical, empirical and methodological grounds (e.g. Bambra 2006; Scruggs/Allan 2006). This process has resulted in Scruggs and Allan (2006: 62-67) revising the decommodification index and developing the nowadays widely-used 'benefit generosity index' which includes annual values on the generosity of unemployment benefits, sick pay and pensions.

A more fundamental problem concerns the validity of the entitlement data itself. Focusing on replacement rates, the most commonly used component of welfare generosity, Wenzelburger, Zohlnhöfer and Wolf (2013) as well as Danforth and Stephens (2013) conducted regression analyses, in each case using data from the most prominent data sources, the Comparative Welfare State Entitlements Dataset (CWED) by Scruggs (2004) and the Social Citizenship Indicator Program (SCIP) by Korpi and Palme (2007).[7] Both studies demonstrate that, irrespective of statistical technique and covered time period, dataset choice has a substantial impact on the results, especially regarding the statistical significance of partisanship (see Tab. 4). At the bottom of the diverging results are notable differences between the datasets themselves, illustrated by correlations of r < 0.70 for sick pay and pensions (Wenzelburger et al. 2013: 1231-1235). However, this is far from saying one dataset is generally better or worse than the other. Rather, the differences result to a substantial part from the underlying concepts of social rights.[8] While the SCIP rests upon a program-based approach with a focus on the decommodifying character of individual welfare programs, the

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[6] Jensen (2011f) notes that social spending might still be the best measure when analyzing welfare programs like health care and education due to little cross-national variance in entitlement criteria and benefit type.
[7] The CWED has since then been replaced by CWED II (Scruggs et al. 2014), while the SCIP has been concluded in 2013, with updates on its core variables published in the Social Policy Indicators (SPIN) database.
[8] Additional causes for divergence are the selection of data sources and differing assumptions and methods in calculating replacement rates (Danforth/Stephens 2013: 1287-1288).

CWED is based on a more risk-based approach which concentrates on the social risk profiles of certain recipient groups and thus includes additional, in many cases means-tested, cash transfers (Danforth/Stephens 2013: 1286-1287; see also Ferrarini et al. 2013).

More generally, this example demonstrates that competing and at first sight similar entitlement datasets can contain quite different information and thus have a substantial impact on the eventual results. Regarding future research, this presents not so much a problem but a cautionary tale. In other words, the lesson drawn is that researchers have to be (more) conscious about choosing a dataset which matches their conceptual framework.

- Table 4 -

4.2 The Problem of the Independent Variable

In addition to old and new problems concerning the dependent variable, there is a growing awareness for the problems attached to the conventional operationalization of the independent variable. At the heart of the 'independent variable problem' (Horn 2012) lies a disputable conceptualization of partisanship. Almost all quantitative studies testing for the impact of governmental ideology "use a static concept of ideological affiliation […] using time-invariant tags or labels based on expert judgments" (ibid.: 11). However, this way of locating parties on the left-right scale is based on the questionable assumptions that political parties do not change their ideological positions over time and that labels like social democracy mean the same in different countries (Döring/Schwander 2015: 178-179). These assumptions are not only called into question by a cursory look at social democracy in Europe but also at odds with the broader empirical evidence, for instance findings obtained from party manifestos as well as regularly conducted expert surveys (e.g. Budge/Klingemann 2001; Bakker et al. 2015). A research that clings to static labels is therefore in danger of arriving at invalid results. But a static concept of partisanship has another huge drawback. If statistical tests fail

to identify partisan effects, the usage of time- and space-invariant labels does not tell us whether parties do not *want* to make a difference any longer due to ideological convergence or if they, as proclaimed by proponents of the 'new politics' school, *cannot* make a difference any more due to institutional and socioeconomic restrictions (Horn 2012: 12; [author]).

Given these serious problems, a number of authors have begun to apply more dynamic concepts. The primary source for this purpose is the Manifesto Project (MP) which derives its data on parties' policy positions from content analysis of electoral manifestos (Volkens et al. 2016). The most popular way to obtain time-variant values of party positions is the usage of the MP's right-left index (see Immergut/Abou-Chadi 2014; Tromborg 2014; Döring/Schwander 2015). This index, however, is not without problems, as it includes a number of items (like 'peace', 'law and order' etc.) disconnected from the socioeconomic cleavage which is assumed to be at the heart of the analyzed partisan effects. The solution consists in isolating the socioeconomic dimension by creating disaggregated indices focusing solely on socioeconomic items (Horn 2012: 15-19; [author]). This innovative approach is chosen by Finseraas and Vernby (2011) who, in this way, incorporate a variable on party (bloc) polarization into their study. By doing so, they are able to show that parties still matter, but only when party polarization is strong enough.

- Table 5 -

4.3 Does Standard Panel Data Analysis Discriminate against Partisan Variables?

One potentially relevant criterion not discussed so far is the statistical technique adopted in the individual studies. The main reason for this omission is presented in Table 5, which groups the studies along the lines of the chosen statistical technique, including cross-section analyses as well as different types of time-series cross-section analyses. As we can see, the choice of the statistical method – and thus also the choice to focus on welfare state levels or

changes – does not make a notable difference on the cross-study level when we account for the dependent variable. Choosing a different strategy and starting from a self-compiled dataset on social spending, Schmitt (2016) reproduces the most frequently used specifications of fixed effects, first differences and error corrections models. Her comparison shows a more differentiated picture, demonstrating that slight changes in model specifications can have a substantial impact on the empirical results, with model specifications ranging between positive and negative values. What is more notable, and in line with the presented results on social spending, is that not a single coefficient of the eleven model specifications turns out to be statistically significant.

Instead of stopping at this point, Schmitt argues that the negative results of her own analysis and most other studies on social spending are, at least partly, a methodological artifact (ibid.: 1442). Accordingly, the focus on annual changes influences the results against partisan variables, since the composition of government does, in contrast to many macroeconomic variables, not change on a yearly basis and since partisan variables will most likely realize their effects less regularly and often over a longer time frame.[9] Some welfare scholars have addressed those problems by measuring partisanship in a cumulative way, i.e. focusing on 'legacy effects' by including partisan effects dating back to the golden age (e.g. Huber/Stephens 2001), or by calculating averages over longer time-spans (e.g. Tepe/Vanhuysse 2010a; Fervers et al. 2016). Schmitt proposes a different approach which replaces country-years by cabinets as units. This approach is well grounded in partisan theory, which assumes that policy changes result primarily from changes of government.

So is Schmitt's claim that the standard country-years approach discriminates against partisan variables correct? The empirical results available so far clearly point in this direction. This is first shown by Schmitt's own results. In contrast to the models based on country-years,

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[9] The often pursued strategy, proposed by Beck and Katz (1995), of including country dummies to deal with unit heterogeneity can also absorb partisan effects since level effects across countries cannot be estimated anymore (Schmitt 2016: 1447).

the influence of left government on social spending is positive and statistically significant in all six models based on cabinets. Furthermore, statistically insignificant interaction terms indicate that partisan effects neither decrease over time nor with intensifying globalization (Schmitt 2016: 1451-1454). The claim that the cabinet approach is more sensitive for partisan effects is reinforced by another study. In their study on the determinants of pension reforms, Immergut and Abou-Chadi (2014) develop a similar approach and use 'government configurations' as units of analysis. Notably, their analysis is among the few studies on pensions which find significant effects in line with partisan theory.

To sum up, the evidence, though rather scarce at the moment, supports the claim that standard panel data analysis discriminates against partisan variables. Using political configurations like cabinets instead of country-years as units of examination offers a sensible and viable starting point for further research which might complement and even alter the present picture on partisanship and social spending in the retrenchment era. Since the existing studies are far from unanimous on what constitutes a government configuration[10], this adds another interesting facet to the researcher's task of conceptualizing and operationalizing the independent variable in an appropriate way.

5. Conclusion

Since the early 2000s, a substantial number of welfare scholars have conducted macro-quantitative studies to contribute to the debate on the impact of partisanship in the era of welfare retrenchment. Up to now, a systematic summary, which exposes the main insights of this literature, has been missing. This article fills this void. Based on a body of 54 studies, it shows that the findings are highly dependent on the choice of the dependent variable as well

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[10] In contrast to an approach which considers successive cabinets with the same party composition and a prime minister of the same party as one case (Boix 1997: 483), Schmitt uses the stricter measure of changes in cabinet shares (Schmitt 2016: 1452). Immergut and Abou-Chadi go even further by considering a change in the majority of the second chamber (if politically relevant) as the start of a new government configuration (Immergut/Abou-Chadi 2014: 276).

as the examined welfare program. While statistical analyses based on social spending generally find no significant partisan effects, a result that clearly deviates from the golden age, a clear majority of studies based on entitlements, a measure more sensitive to political variables, concludes that parties still matter – but not for all welfare programs. In line with theoretical expectations, parties matter with respect to class-related social policies like unemployment benefits but not with respect to life-course related social policies like pensions.

In addition to those findings, the article has highlighted that the existing research suffers from a number of methodological problems which have to be confronted in future research. First, a comparison of the most prominent entitlement datasets has shown that researchers have to be (more) conscious about choosing data which match their conceptual framework. Second, future research may profit from using more dynamic concepts of partisanship. Using time-variant values of party positions can yield additional insights about the role of parties, e.g. help us to understand if programmatic convergence or external constraints are at the bottom of declining partisan effects. Third, there is some fresh evidence that standard panel data analysis discriminates against partisan variables. Shifting the focus from country-years to political entities like cabinets might challenge and even alter the here presented findings on the no longer existent impact of parties on social spending.

Finally, we want to point to three bodies of research which have not been included in this article but promise to yield valuable additional insights. First, the existing research focuses almost exclusively on advanced Western welfare states. More recently, some welfare scholars have started to expand the view to welfare states in Latin America (Huber et al. 2008), Eastern Europe (Careja/Emmenegger 2009) and the less developed world in general (Ha 2015). This kind of research is needed to understand if our findings are restricted to advanced welfare states or if they represent a broader historical pattern. Second, this summary has focused on the classic social insurance programs which account for the lion's share of social spending. However, some welfare scholars argue that the politics of 'new social policies' like

active labor market policies and childcare differ substantially from the old ones (Häusermann 2012).[11] Studies on partisan effects in those sectors of the welfare state can contribute to test this claim (see e.g. Bonoli/Reber 2010; Vlandas 2013).

Last but not least, the presented studies focus primarily on direct welfare cuts. This kind of policy retrenchment can be contrasted with institutional reforms, i.e. reforms that alter the institutional structure of welfare programs and thus "shift decision-making authority and affect the power resources of political actors such as parties and interest groups" (Klitgaard et al. 2015: 950). Since those reforms are of high significance for policy-seekers but often invisible to voters, political parties can be expected to make a substantial difference in this regard (ibid.: 950-952). While the research of Klitgaard and his colleagues has so far focused on Denmark and a small number of other European welfare states, the extension of their approach to the OECD world promises to shed a completely new light on the role of partisanship in the retrenchment era.

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[11] A similar point is made by Jensen (2011b) who diagnoses a 'transfer bias' in the welfare literature and a need for more research on the determinants of welfare service provision.

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Table 1: Studies on Partisan Effects after the Golden Age

Study	Dependent Variable	Countries	Period	Partisan Effect
Castles 2001	Social Spending (A)	19	1984-1997	(~)
Kittel/Obinger 2003	Social Spending (A)	21	1982-1997	(~)
Korpi/Palme 2003	Replacement Rates (A)	18	1975-1995	(+)
Moene/Wallerstein 2003	Social Spending (A/H/P/U)	18	1980-1995	(+)(+)(+)(~)
Allan/Scruggs 2004	Replacement Rates (U/H)	18	1975-1999	(+)(+)
Castles 2005	Social Spending (A)	21	1990-2001	(~)
Hicks/Zorn 2005 (2007)[a]	Social Spending (A)	18	1978-1994	(~)
Swank 2005	1) Replacement Rates (H/P/U) 2) Generosity Index (A)	18	1981-2000	1) (+)(+)(+) 2) (+)
Amable et al. 2006	1) Social Spending (A) 2) Replacement Rates (H)	18	1981-1999	1) (~) 2) (+)
Brooks/Manza 2006a	Social Spending (A)	15	1986-2000	(~)
Brooks/Manza 2006b	Social Spending (A)	14	1980-2000	(~)
Jahn 2006	Social Spending (A)	16	1980-2001	(−)
Bolzendahl/Brooks 2007	Social Spending (A)	12	1980-1999	(~)
Bolzendahl 2009	Social Spending (A)	12	1980-1999	(~)
Busemeyer 2009	Social Spending (A)	21	1980-2004	(~)
Hicks/Freeman 2009	Replacement Rates (P)	18	1975-2000	(−)
Potrafke 2009	Social Spending (A)	20	1980-2003	(~)
Tepe/Vanhuysse 2009	1) Social Spending (P) 2) Generosity Index (P)	18	1980-2002	1) (~) 2) (~)
Bolzendahl 2010	Generosity Index (A)	12	1980-2000	(~)
Jensen 2010	Social Spending (A)	18	1980-2000	(+)
Kwon/Pontusson 2010	Social Spending (A)	16	1971-2002[c]	(~)
Potrafke 2010	Social Spending (H)	18	1971-2004[c a]	(~)
Tepe/Vanhuysse 2010a	Social Spending (H/P/U)	21	1980-2003	(~)(~)(~)
Tepe/Vanhuysse 2010b	Social Spending (A)	21	1980-2005	(~)[d]
Bolzendahl 2011	Social Spending (A/H/P)	12	1980-1999	(~)(~)(~)
Finseraas/Vernby 2011	Generosity Index (A)	18	1972-2002[c]	(+)
Jensen 2011a	Social Spending (A/H)	18	1985-2002	(~)(~)
Jensen 2011b	Social Spending (H)	18	1980-2001	(~)
Jensen 2011c	1) Replacement Rates (U) 2) Social Spending (H)	18	1980-2000	1) (+) 2) (~)
Jensen 2011d	Social Spending (A)	18	1980-2002	(~)
Jensen 2011e	Social Spending (A)	18	1980-2001	(~)
Jordan 2011	Social Spending (H)	18	1960-2000[c]	(~)
Schmitt/Starke 2011	Social Spending (A/H/P/U)	21	1980-2005	(~)(~)(~)(~)
Fernandez 2012	Generosity Index (P)	19	1981-2004	(~)
Jensen 2012a	1) Replacement Rates (U) 2) Social Spending (H)	18	1980-2002	1) (+) 2) (~)
Jensen 2012b	Social Spending (H/P/U)	18	1980-2002	(~)(~)(~)
Arnold 2013	Replacement Rates (H)	31	1981-2010	(~)

Danforth/Stephens 2013a[b]	Replacement Rates (H/P/U)	18	1975-2000	(+)(−)(+)
Danforth/Stephens 2013b[b]	Replacement Rates (H/P/U)	18	1975-2000	(+)(+)(~)
Wenzelburger et al. 2013a[b]	Replacement Rates (H/P/U)	18	1990-2000	(+)(−)(~)
Wenzelburger et al. 2013b[b]	Replacement Rates (H/P/U)	18	1990-2000	(~)(~)(~)
Galasso 2014	Replacement Rates (U)	25	1975-2007	(+)
Herwartz/Theilen 2014	Social Spending (A)	21	1980-2008	(~)
Immergut/Abou-Chadi 2014	Generosity Index (P)	16	1980-2003	(+)
Jensen/Mortensen 2014	Replacement Rates (U)	17	1980-2007	(+)
Jensen et al. 2014	Replacement Rates (U)	18	1976-2000	(+)
Jurado 2014	Social Spending (A)	22	1980-2006	(~)
Montanari/Nelson 2014	Generosity Index (H)	18	1980-2005	(+)
Reeves et al. 2014	Social Spending (H)	27	1995-2011	(~)
Tromborg 2014	Social Spending (P/U)	18	1980-2007	(~)(~)
Wolf et al. 2014	Replacement Rates (H/P/U)	18	1980-1999	(+)(−)(+)
Döring/Schwander 2015	Replacement Rates (U)	18	1975-1999	(+)
Jensen/Seeberg 2015	Social Spending (A)	23	1980-2007	(+)
Knotz/Lindvall 2015	Replacement Rates (U)	25	1985-2008	(+)
Armingeon et al. 2016	Social Spending (A)	17	1982-2009	(~)
Fervers et al. 2016	Social Spending (H)	22	1980-2009	(+)

Notes: Welfare Programs: A = Aggregate, H = Health/Sick Pay, P = Pensions, U = Unemployment; Partisan Effects: (+) = Partisan Effects, (~) = No Partisan Effects, (−) = Reversed Partisan Effects.
Studies in bold are focusing on partisanship or treat it at least as one of the major independent variables and not as a mere control variable.
[a] The revision published in 2007 confirms the original results.
[b] Both studies have been split due to conducting similar tests with two different datasets.
[c] Studies contain separate analyses for the post-1973 period.
[d] Significant partisan effects regarding smaller cutbacks.

Table 2: The Dependent Variable and Partisanship

	(+)	(~)	(–)	Total
Spending	6 (12.0%)	43 (86.0%)	1 (2.0%)	50
Generosity	25 (65.8%)	9 (23.7%)	4 (10.5%)	38
Total	31 (35.2%)	52 (59.1%)	5 (5.7%)	88

Notes: (+) = Partisan effects, (~) = no partisan effects, (–) = reversed partisan effects.

Table 3: Welfare Programs and Partisanship

	All			Spending			Generosity		
	(+)	(~)	(–)	(+)	(~)	(–)	(+)	(~)	(–)
Aggregate	6	22	1	3	21	1	3	1	-
Unemployment	11	8	-	-	5	-	11	3	-
Health	10	13	-	2	11	-	8	2	-
Pensions	4	9	4	1	6	-	3	3	4

Notes: (+) = Partisan effects, (~) = no partisan effects, (–) = reversed partisan effects.

Table 4: Partisan Effects Based on Competing Datasets

		Unemployment		Sick Pay		Pensions	
		CWED	SCIP	CWED	SCIP	CWED	SCIP
Wenzelburger et al. 2013	SD			(+)***	(+)		
	CD			(~)	(–)***		
	Center	(+)***	(+)**	(+)***	(+)		
	Lib	(+)***	(+)*			(+)***	(+)
		(+)*	(+)***				
	Right					(+)***	(+)
Danforth/Stephens 2013	Left	(+)***	(+)	(+)***	(+)	(–)***	(+)***
	CD	(~)	(~)	(+)***	(+)***	(+)***	(+)***

Sources: Wenzelburger et al. 2013, Tab. 3; Danforth/Stephens 2013, Fig. 1.
Notes: SD = Social Democrats, CD = Christian Democrats, Center = Non-Christian center, Lib = Liberals.
(+) = Positive effect on replacement rates, (~) = no effect, (–) = negative effect.
* Significant at the 0.10 level, ** significant at the 0.05 level, *** significant at the 0.01 level.
Wenzelburger et al. (cross-section, 1990-2000) present best-fit models for the CWED (black) as well as the SCIP (grey). Danforth and Stephens (time-series cross-section, 1975-2000) only give information on statistical significance at the 0.01 level.

Table 5: Statistical Technique and Partisanship

	All			Spending			Generosity		
	(+)	(~)	(–)	(+)	(~)	(–)	(+)	(~)	(–)
Cross-Section	3	7	2	-	3	-	3	4	2
Pooled	23	35	4	3	33	2	20	2	2
- B+K	13	8	2	1	6	1	12	2	1
- FD	7	12	1	1	12	1	6	-	-
- ECM	4	15	1	1	15	-	3	-	1

Notes: B+K = Beck/Katz (1995) standard (including modifications), FD = first differences, ECM = error correction models.
(+) = Partisan effects, (~) = no partisan effects, (–) = reversed partisan effects.
Ten studies have been excluded due to methodological reasons. Kittel and Obinger (2003) as well as Jahn (2006) conducted different forms of statistical tests and were included twice (for more see Tab. A2 in the Appendix).

Table A1: Time and Interaction Effects

Study	Period	Decline over Time	Conditional on …
Kittel/Obinger 2003	1982-1997	yes	political institutions
Amable et al. 2006	1981-1999	-	economic shocks, structural change
Brooks/Manza 2006a	1986-2000	-	welfare regime
Potrafke 2009	1980-2003	yes	globalization
Jensen 2010	1980-2000	-	partisan hegemony
Kwon/Pontusson 2010	1971-2002	yes	globalization, union strength
Potrafke 2010	1971-2004	yes	-
Finseraas/Vernby 2011	1972-2002	no	-
Jensen 2011b	1980-2001	yes	-
Jensen 2011e	1980-2001	yes	corporatism
Jordan 2011	1960-2000	yes	-
Jensen 2012a	1980-2002	-	unemployment, globalization
Galasso 2014	1975-2007	-	economic crisis
Herwartz/Theilen 2014	1980-2008	yes	political institutions
Jensen/Mortensen 2014	1980-2007	-	political institutions
Wolf et al. 2014	1980-1999	yes[*]	-
Armingeon et al. 2016	1982-2009	-	fiscal consolidation
Fervers et al. 2016	1980-2009	yes	-

[*] Declining partisan effects regarding unemployment and health benefit generosity.

Table A2: Statistical Technique and Partisanship

Cross-Section	Beck/Katz Standard (Levels)	First Differences (Changes)	Error Correction Models
Castles 2001 (~)	Swank 2005 (4+)	Kittel/Obinger 2003[2] (~)	Busemeyer 2009 (~)
Kittel/Obinger 2003[1] (~)	Jahn 2006[1] (−)	Allan/Scruggs 2004 (2+)	Hicks/Freeman 2009 (−)
Castles 2005 (~)	Bolzendahl/Brooks 2007 (~)[a]	Amable et al. 2006 (+/~)	Kwon/Pontusson 2010 (~)
Wenzelburger et al. 2013a (+/~/−)	Bolzendahl 2009 (~)[a]	Jahn 2006[2] (−)	Jensen 2011a (2~)
Wenzelburger et al. 2013b (3~)	Bolzendahl 2010 (~)[a]	Busemeyer 2009 (~)	Jensen 2011c (+/~)
Wolf et al. 2014 (2+/−)	Jensen 2010 (+)	Potrafke 2009 (~)	Jensen 2011e (~)
	Bolzendahl 2011 (3~)[a]	Potrafke 2010 (~)	Schmitt/Starke 2011 (4~)
	Danforth/Stephens 2013a (2+/−)[a]	Finseraas/Vernby 2011 (+)	Jensen 2012a (+/~)
	Danforth/Stephens 2013b (2+/~)[a]	Jensen 2011b (~)[a]	Jensen 2012b (3~)
	Galasso 2014 (+)	Jensen 2011d (~)	Herwartz/Theilen 2014 (~)
	Jurado 2014 (~)	Jordan 2011 (~)	Jensen/Mortensen 2014 (+)
	Immergut/Abou-Chadi 2014 (+)[a]	Jensen et al. 2014 (+)	Jensen/Seeberg 2015 (+)
	Montanari/Nelson 2014 (+)	Reeves et al. 2014 (~)	
	Knotz/Lindvall 2015 (+)	Tromborg 2014 (2~)	
		Döring/Schwander 2015 (+)	
		Armingeon et al. 2016 (~)	
		Fervers et al. 2016 (+)[a]	

Notes: Not included in the table are studies based on event history analysis (Korpi/Palme (2003), Hicks/Zorn (2005), Tepe/Vanhuysse (2010b), Fernandez (2012)) as well as pooled analyses with a small number of observations (N≤76) (Moene/Wallerstein (2003), Brooks/Manza (2006a, 2006b), Tepe/Vanhuysse (2009, 2010a) and Arnold (2013)).
[a] Prais-Winsten regression.