Politics as a Process Structured in Space and Time

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What do we see when we look at the political world across space and time? In large measure, that depends on what we are looking for and the lens through which we look. This is as true of political science today as it was of seventeenth century scientists looking for phlogiston through rudimentary microscopes. Moreover, by conditioning what we can see, the lens we use conditions our assumptions about what we should see, notably about causal structures in the world, and thus what we find. From time to time, it is worthwhile asking whether we are looking for the right things through the right lenses.

In this paper, I ask that question and propose some answers for issues in comparative politics. My intuition is that some of the lenses through which the field is currently looking, although sophisticated, may not reflect well the causal structures in the political world, leading us to overestimate the effects of some factors, while underestimating others. Any inquiry of this sort must be read, of course, as a provocation rather than as settled disposition of the issues. To question what is found through one kind of lens, one has to look through others, and there is room for debate about which should be used. Moreover, alongside empirical inquiry, discussion about the underlying structure of causal relations entails imaginative extrapolation that is always open to question. However, periodic efforts of this sort are worthwhile, lest we lose sight of the forests for the trees.

My concern here is with politics as a process that is structured across space and over time. I will argue for the value of seeing it in those terms, explore what that entails, and argue for some specific conceptual optics that offer a powerful lens through which to view politics. In that respect, this paper is also an attempt to contribute to the theoretical development of historical institutionalism. That school of thought has made important contributions to understanding how politics is structured, but its recent formulations raise some quandaries that I will attempt to resolve, using the core insight that institutions are built by social coalitions.
In minimalist terms, to say that politics is a structured process is simply to suggest that the behavior of political actors and the outcomes of political conflict are conditioned, not only by variables whose values change fluidly across time and space, but also by factors that are relatively stable for discrete periods but divergent across cases. In general terms, we can think of these as context effects (Falleti and Lynch 2009, Goertz 1994). Substantively, this means embracing models of the polity that acknowledge the social, economic and political structures in which actors are embedded, the interaction effects these structures generate, and the corresponding variation across countries and time generated by such effects. I will move beyond this minimalist formulation to develop more concrete propositions but begin with a critical evaluation of recent work to show the value of doing so.

The Struggle for Structure in Comparative Political Economy

One of the bodies of work in political science that best illustrates what is at stake is the recent literature in comparative political economy developed to explain governments’ efforts to reduce inequality. This is a literature of vibrant debates devoted to an important topic. It might be expected to support structural views of politics because it attempts to explain outcomes that display a great deal of systematic variation across countries and over time. However, recent debates reflect what can be seen, at best, as a set of incremental steps toward structural views of the political economy.¹

The slow pace of that march can be attributed, at least in part, to the influence of what might be described as a Schumpeterian view of politics. On this view, the polity is composed largely of individual rational actors, who may be citizens or organizations representing them, seen as atomistic actors endowed with particular sets of material assets most often understood as income, and interested mainly in increasing that income or securing the power to do so. Broadly speaking, politics is seen as a competitive market process in which politicians compete for votes from electors who are influenced mainly by concerns to maximize a continuing stream of income.
The recent history of this sub-field can be read as an effort to put some structural flesh on these bones.

This Schumpeterian image corresponds closely to the analytical frameworks used by neoclassical economics. Within these debates, its popularity can be traced to the influence of Meltzer and Richard (1981) who employed this type of model to explain governmental efforts at redistribution as a function of the existing distribution of income. In other foundational work, Moene and Wallerstein (2003) deployed a similar model to explain why the predictions of the Meltzer-Richards model did not correspond to cross-national patterns of inequality, by incorporating workers’ desires for insurance against adverse economic events.

In an important step forward, political structures were introduced into the analysis in the form of electoral rules. Persson and Tabellini (2003) argued there will be more redistribution in countries with proportional representation than in those with majoritarian electoral rules, because politicians elected in single-member districts will be inclined to distribute public spending across those districts, while the process of coalition formation under PR is more likely to result in bargains that redistribute across social groups (see also Persson et al. 2007). In such models, politicians are influenced by institutional structures, even if voters are not.

In elegant and influential work, Iversen and Soskice (2006) go a step farther to argue for the importance of electoral rules in terms that bring voters into the center of the analysis. They assume that parties of the political left will redistribute more than parties of the right and argue that left parties are more likely to secure office under PR rules because the latter facilitate coalitions with center parties prepared to tax the rich to redistribute to their low and middle income constituents. Under majoritarian rules, by contrast, where the choice is usually between parties of the center-left or center-right, the decisive median voter will often hesitate to support the center-left because he cannot be certain that the party will redistribute toward rather than away from him, and he fears losses more than he values gains. Accordingly, electoral rules
condition redistribution through the coordination problems they pose for voters as well as politicians.

Although this work is illuminating, its image of why electors vote for one party over another is minimal. Voters are seen as individual actors, concerned entirely about their income, uninfluenced by ideological frameworks, structural relations with other actors, or the institutions of the political economy. There is virtually no structure to the electorate, other than the one imposed by a rather arbitrary division of voters into low, medium and high income categories, and no cross-national variation to the electorate’s structure.

To address that issue, Lupu and Pontusson (2009) bring in variation in voters’ preferences over redistribution. They explain cross-national variation in levels of redistribution by reference to the ratio of market income at the median and tenth deciles, arguing that decisive voters with close to median incomes are more likely to support redistribution where the bottom half of the income distribution is compressed, presumably because they are correspondingly more likely to identify with the less affluent. Without exploring the point, they note that the relevant wage dispersion might be linked to cross-national variation in wage bargaining systems (Pontusson et al. 2002).

This approach has some nice points of tangency with Iversen and Soskice (2001) who argue that the structure of a country’s skill system can influence voters’ preferences over redistribution. Their core contention is that workers in political economies supporting production regimes based on specific skills will have a stronger insurance motive to support redistribution because, if they lose their jobs, they will lose more income and have more difficulty finding reemployment than workers in political economies that favor general skills (see also Cusack et al. 2008). Here, cross-national variation in redistribution is explained by voters’ preferences over redistribution rooted in institutional differences in the political economy.

Although other articles could be cited, this brief review of recent debates about redistribution should be sufficient to indicate their general character. On the one hand, forward
movement in this research program is marked by successive efforts to uncover the structural features of the political economy that explain cross-national variation in redistributive effort. New steps usually rest on a claim that previous work has neglected factors structuring the politics of inequality. On the other hand, because the debate is still rooted in Schumpeterian models, its conceptions of how politics is structured remain relatively thin. Most contributions emphasize a small number of structuring factors and rarely look for interactions between them.

Across much wider literatures, this posture is encouraged by the popularity of panel-based estimation techniques with cross-national and time-series components. Such techniques are appealing because they allow for statistical estimations in contexts where the relevant number of country cases is small (cf. Shalev 2006). However, they encourage assumptions about the structure of causal relations that militate against seeing politics as a process that is highly structured either by context effects specific to particular places or by various kinds of syncopation in time. At a basic level, those techniques imply unit homogeneity, namely, that, ceteris paribus, a change of the same magnitude in the independent variable will produce the same change in the dependent variable in all cases, and that the most relevant ceteris are indeed paribus, namely that all the factors impinging on both the outcome and the explanatory variables have been fully specified in the estimation (King et al. 1994). Although some period and interaction effects can be included in such estimations, in practice, they rarely are. It is difficult, for instance, to include institutions that are stable over long periods of time or to allow for interaction effects that operate in one period but not others. Thus, as they are typically used, these techniques imply a political world in which outcomes are driven by a relatively small set of causal factors operating largely independently of one another and with consistent casual force across space and time. Their popularity promotes images of the polity as a homogenous plane, without historical texture, in which ancillary institutional or ideological developments are relatively unimportant and the basis for political action does not change much over time.
Most studies that explore how levels of social spending are driven by the partisan complexion of government, for instance, construe political parties as actors with an entirely consistent identity over time. Some even assume that all political parties on the left or right of the political spectrum can be treated as equivalent units regardless of the country or context in which they operate. Social democracy is characteristically seen as a homogenous force operating in the same way across space and time (Brady et al. 2003). Similar assumptions are made about important economic factors, such as levels of economic openness. The usual presumption is that a given increase in exposure to trade has the same effect on redistribution in 1966, say, as it does in 2006 and equivalent impact regardless of the country in which it is occurring.2

These are defensible assumptions but they militate against investigation into the context effects that structure political contestation in particular places or times, and they neglect the possibility that the most important impact of a key economic or political development may derive, not from its immediate effects on the outcome of interest, but from the ways in which it restructures the institutional or ideological setting so as to affect outcomes in later periods (Pierson 2004).3 At best, such models provide a limited picture of the ways in which politics works.

To take a simple illustration, suppose we are interested in the impact of a shift from Conservative to Labour governance on social or economic policy in Britain. We might assess that by calculating the average effects of a shift in governance based on the values taken by indicators for these policies under Labour and Conservative governments throughout the post-war period. For some purposes, that may be useful. But, as the person who is drowning in a river that averages three feet deep soon realizes, such observations hide as much as they reveal. Will that technique generate adequate explanations for what a Labour government taking office in 1945 or 1997 will do? In principle, this approach predicts they will do roughly the same thing. In fact, as we know, the policies of those two Labour governments were radically different; and they were different because of variation in key features of historical context, including the ideological
frameworks and institutional practices current at each juncture. How well do we understand the impact of Labour governance without taking such factors into account?

In similar terms, it is instructive to compare how contemporary analyses of redistribution treat changes in the international economy with Cameron’s (1978) seminal analysis of such issues. Recent studies typically treat changes in international capital flows or exposure to trade as variables with direct effects on levels of public spending that occur in annual increments as the level of integration varies – often to conform to the requirements of panel-based estimations (Garrett 1998, Alderson and Nielsen 2002). There are good reasons to question whether such specifications model even the immediate effects of economic integration in plausible terms (cf. Iversen and Cusack 2000). However, they certainly neglect the possibility that the most important consequences of changes in economic openness may flow from structural effects on the economic or institutional environment that show up only over the long term. Cameron argues, for instance, that the effect of increasing economic integration at the turn of the last century was to alter the structure of the political economy, as integration fostered forms of industrial concentration, thus encouraging the development of more powerful trade unions and employers associations, which led, over subsequent decades, to a neo-corporatist politics favorable to the expansion of public spending (see also Katzenstein 1985, Berger 2003).

Cameron’s analysis may not be correct in all respects but it reveals causal paths widely missed by contemporary studies that do not consider the ways in which economic or political developments shift the basic structures within which political contestation and policy-making takes place (Pierson 2004). The contemporary literature sometimes ascribes limited effects to economic integration, at least in part because it does not see politics as a terrain that is restructured over time. Instead, the political world appears as an open terrain in which any particular factor has the same influence at any point in time regardless of the historical context in which it occurs. Politics is presented as a process driven by small sets of variables of timeless importance operating relatively independently of each other. There is some value in looking for
such variables. Searching for them is in keeping with the aspiration of post-war social science to find propositions so general that they apply, in principle, across all times and places (Przeworski and Teune, 1970). But there is a case, too, for approaching politics as a field likely to be structured across space and time.

Seeing politics as a structured process entails operating from models of the polity that acknowledge the most important social, economic and political structures in which actors are embedded, the interaction effects generated by these structures, and the corresponding variation across countries and time to which such effects give rise. These models do not give up the aspiration to generality that is central to social science, but emphasize the importance of securing effective generalizations, which incorporate relevant interaction effects into assessments of the impact of the explanatory variables and specify with care the scope conditions relevant to the analysis, defined partly in terms of the presence of such structural factors.

The broader literature in comparative political economy already provides evidence that politics is structured across nations, reflected in studies of types of welfare states and varieties of capitalism (Esping-Andersen 1990, Hall and Soskice 2001, Amable 2003). The power resources approach to redistribution sees the dimensions of power implicit in class relations as structural features of the polity built up gradually over time (Esping-Andersen and Korpi 1984, Stephens 1979, O’Connor and Olsen 1998, Brady et al. 2003). There is also a growing body of evidence that politics is structured across time. A number of analysts argue that the politics of social policy is different in the post-industrial era than it was in an industrial era and that politics shifts with the size of the welfare state, giving rise to a politics of retrenchment that is different from the politics of growth (Iversen and Wren 1998, Scharpf, 2001, Pierson 1996, 2001). It is but a short step from such observations to the conclusion that, when social democratic parties move into government, the effects may be different in 2006 than they were in 1976, and we should be acknowledging this in our models.
In sum, there is a strong case for beginning from images of politics as a deeply structured process rather than from Schumpeterian models positing atomistic actors endowed with particular material assets. There is a case too for inquiring more deeply into how the relevant structures shift over time. As Pierson (2004) has noted, we miss much of what explains political outcomes if we do not take into account such ‘big, slow-moving processes’.

The Challenge for Historical Institutionalism

For some years, the analysts most inclined to take on such issues have been those working within the school of thought known as historical institutionalism. Their initial formulations were inspired by a reaction against behavioral models that saw politics as a matter of interest group conflict conditioned by political culture but largely unmediated by institutional structures (Steinmo et al 1992). Historical institutionalists brought the state back in as a field of institutions capable of structuring, as well as responding to, group conflict, and, influenced by research on neo-corporatism, went on to argue that the structures organizing capital and labor condition such conflict, giving rise to nationally or regionally specific patterns of action and policy (Skocpol 1985, Goldthorpe 1984, Hall 1986, Streeck 1992, Immergut 1998, Thelen 1999). These optics provided influential explanations for cross-national variation in many kinds of outcomes.

Historical institutionalists also developed a number of formulations to describe how politics is structured over time. The two most influential are built on concepts of critical junctures and path dependence. Following Krasner’s (1984) argument that politics reflects a ‘punctuated equilibrium’, some scholars adopted the view that history can be divided into moments of critical juncture, when developments largely exogenous to institutions render them more pliable, and intervening periods of stability, when the institutions established at critical junctures structure political outcomes (Collier and Collier 1991, Mahoney 2000, Capoccia and Keleman 2007). To explain that stability, analysts devised conceptions of path dependence, based on the contention that positive feedback effects arising from the entrenched entitlements,
coordination effects or network externalities generated by institutions alter the attractiveness of the options facing political actors profoundly enough to foreclose some paths of political development, while making movement along others more likely (Pierson 2000, 2004).

In recent years, however, historical institutionalists have looked more deeply into issues of institutional change. That has produced a ‘second wave’ of work exemplified in the collective volumes of Streeck and Thelen (2005a) and Mahoney and Thelen (2009). In many respects, this second wave has been immensely fruitful. It provides dynamic analyses of institutions that situate them within historical contexts, generates a host of new propositions about how institutions change, and begins to explore the intricate relationship between institutions and social coalitions. However, this new focus on institutional change has brought historical institutionalists face-to-face with a paradox: the more attention they devote to the factors that shape institutions, the more they call into question the power of institutions to shape politics (cf. Riker 1980).

Three of the formulations adopted by Streeck and Thelen (2005b) bring this paradox into sharp relief. They imply that institutions should be seen as instruments in the hands of political actors and active objects of political contestation, thereby calling into question the proposition that institutions structure politics in more fundamental ways than an instrument normally would.\(^5\) Second, Streeck and Thelen (2005b: 22) emphasize that there are a multiplicity of institutions in every field, frequently layered one on top of another. Thus, what actors can do is not always limited by the range of available institutions. Instead, actors choose which institutions to use relatively freely and mold them to their purposes. If institutions are so plentiful and plastic, however, it becomes difficult to understand why they should be seen as factors structuring behavior rather than simply as instruments in the hands of rational actors whose behavior is driven by something else.

In much the same way, the perspicacious acid of Streeck and Thelen’s (2005b: 8, 18) analysis dissolves the conceptual frameworks once used by historical institutionalists to understand how politics is structured over time. They take issue with the notion that major
institutional changes occur mainly at critical junctures, separated by periods of normal politics, in favor of the view that highly consequential institutional changes takes place on a continuous basis, in incremental steps (see also Palier 2005). This perspective gives up the leverage the critical junctures approach once had over the issue of how to explain when institutions structure conflict and when they are structured by it, leaving us without any strong sense of how politics is structured, if at all, over time.

In light of these developments, it is not surprising that some scholars have described historical institutionalism as an ‘auto-dissolving paradigm’. One need not adopt such an alarmist view, however, to agree that historical institutionalists, too, need to rethink the basis for their longstanding claim that politics is a structured endeavor. There is powerful empirical support for the formulations of this second wave that cannot be rejected out of hand (Thelen 2004). Thus, the problem becomes one of building on their formulations to understand how institutions that are to some extent plastic can nonetheless contribute to the structuring of the political world. I now turn to that problem.

**Seeing Politics as a Structured Process**

The case for seeing politics as a structured process ultimately rests on the adequacy of the microfoundations used to specify the nature of actors in the political world. The Schumpeterian model provides one alternative, which regards actors as calculating individuals, endowed with certain resources, but connected to other actors mainly by strategic interaction in the service of coordination. Instructive models can be built on such assumptions. However, those assumptions fly in the face of a century of empirical findings in psychology, anthropology and sociology (cf. Elster 2007). Although full of debates, those disciplines are united on at least one point. They all see human beings, not as atomistic individuals connected to others in narrow ways, but as relational actors connected so deeply by social networks, organizational structures, shared
meaning systems and common practices that any actor cannot but be influenced by those connections in multifaceted ways.

To accept the import of this point, we do not have to adopt the view of Foucault (1970) that actors are constituted by such structures or Althusser’s (1971) contention that actors are subjects of ideology because it is ideology that allows them to be acting subjects (Clemens and Cook 1999). It is enough to observe that the ideas common to a community of discourse are likely to influence how an actor interprets the proposals she confronts, just as the particular set of political parties she is offered influences her strategic calculations about which one to support. To see political actors as relational actors implies *ipso facto*, that their actions cannot be explained without reference to multiple dimensions of the relations in which they are embedded. Although scholars have developed sophisticated formulations about such structures, ranging from Marxian concepts of class (Giddens 1973, Parkin 1974) to Bourdieu’s (1977) theories of practice, virtually all such formulations refer to three basic components, which can be seen as the constitutive elements of the connections between actors. These are institutional practices, shared cognitive frameworks, and network relations.

Institutional practices can be defined as regularized routines with a rule-like quality in the sense that actors expect the practices to be observed (Hall and Thelen 2009: 9). Institutions connect actors because they reflect and depend on mutual expectations. They may be formal, if codified and prescribed by relevant authorities, or informal, which is to say observed by mutual agreement. They may but need not be backed by sanctions. So defined, this category encompasses a wide variety of institutions, ranging from those associated with marriage to those that regulate wage bargaining. The core point is that actors do not wander aimlessly in the world. They negotiate their way through the transactions of each day by means of institutional practices (Campbell 2004). Therefore, we cannot explain their actions without reference to these practices.

Shared cognitive frameworks are sets of ideas with implications for action. They may be normative, thereby carrying prescriptive power, or cognitive, in the sense that they describe how
various features of the world work. Goldstein and Keohane (1993) identify three such frameworks: worldviews, composed of the conceptual building blocks of possibility, principled beliefs, which specify what is right and wrong, and causal beliefs, which describe how effects follow from causes. These frameworks are reflected in symbolic representations and shared narratives as well as other forms of discourse (Hall and Lamont 2009, Poletta 2006, Bouchard 2003).

Network relations are composed of the ties people have to others by virtue of regular contact or communication with them. These relations may be informal or organized by sets of rules specifying institutional practices, thereby encompassing organizations. Thus, organizations fall under this rubric, as do networks in which interaction is more informal. Network relations can be classified along multiple dimensions, including by the frequency of contact, the depth of mutual knowledge such contact conveys, the number of members, and the density of their nodes of interaction (Scott 1988, Wellman and Berkowitz 2006).

Although they are conceptually separate, it should be apparent that the social force of these three elements of social relations often derives from how they operate in tandem. Network relations can be consequential because of the cognitive frameworks they promote (Emirbayier and Goodwin 1994). What organizations induce people to do is dependent on the institutional practices they endorse (Meyer and Rowan 1977). By specifying the understandings that make mutual expectations possible, cognitive frameworks provide crucial underpinning for institutional practices (Chwe 2003). All three of these elements structure the interactions people have with each other, creating order out of behavior that might otherwise be shapeless or chaotic.

Just how these elements structure action is, of course, an issue at the heart of all perspectives on politics as a structured process. My objective is not to resolve that problem here but to argue it deserves a central place in the problematics of political science. Politics should be approached with sensitivity to the multifaceted ways in which individuals are connected to one another. All too often, analysts fasten on one feature of the structures in which actors are
embedded without regard for the ways in which others may be mediating its effects. Where the objective is to illustrate how one facet of structure conditions action, such an approach may be helpful. But, when the goal is to explain an important outcome, such as levels of inequality across nations or the policies chosen to address it, where multiple structural effects are likely to be operating in tandem, to emphasize one of them without considering others may be misleading.

At a basic level, the value of seeing politics as thickly, rather than thinly, structured can be seen in the leverage it offers over issues of preference formation, widely viewed as a crucial issue-area in political science (Katzenielson and Weingast 2005, Bates et al. 1998). Influenced by Schumpeterian models of politics, political scientists often think of actors’ preferences in binary terms. Actors are said to have a set of fundamental preferences, generally seen as universal, such as preferences for more income or power, plus a set of strategic preferences over the choices they have to make in any one situation. The latter are usually modeled as a matter of how the institutional setting mediates cooperation in contexts of strategic interaction. This formulation generates revealing analyses about some of the ways in which institutions condition action.

However, there is an increasingly-obvious gap between fundamental and strategic preferences, in which a good deal of preference formation takes place, and it is not well explained by such models. We understand reasonably well why an actor interested in increasing his income, who believes that a particular party program will do so, might vote for one party rather than another given a particular set of electoral rules. But current formulations do not tell us much about why that actor gives priority to increasing his income or why he believes that one party will do so better than another, yet these judgments are also crucial to his decision to choose one party over another.

Progress can be made on such issues by incorporating more of the structural dimensions of politics into the analysis. Instead of assuming actors with narrow preferences that arise unambiguously from the world, for instance, we might posit actors with multiple goals, reflected in multivariate preference functions, who attach weights to each of those goals in the context of
each decision situation. The process whereby those weights are attached can then be modeled as a function of salient features of the institutional, ideological or social context in which the actor is situated (Hall 2009). The preferences workers have over unemployment benefit schemes may vary with the skill structures embodied in national or regional production regimes, and the position a party takes toward a new social security scheme may be affected by domestic or foreign experience with such schemes (Iversen and Soskice 2001, Weyland 2008, Jacobs 2010). Cognitive frameworks popular in specific times and places can explain why an actor thinks one party program is more likely than another to advance his interests (Jacobs 2010, Berman 2001, McNamara 1999). We still have much to learn about how these dimensions of social relations impinge on such judgments. However, to understand how actors form judgments about which goals to privilege and what kinds of actions are most likely to advance them, we need to begin from models of politics as a process structured in more ways than simple coordination models allow.

These observations are especially important to cross-national inquiry because nation-states generate distinctive institutional and ideological fields that survive over long periods of time. The institutional practices, cognitive frameworks and network relations characteristic of a country are constitutive elements of its social ecology. That term reflects the fact that distinctive outcomes are generated by interaction among those elements and the durability of some may depend on the presence of others. Absent an appropriate set of cognitive frameworks, for instance, it may be difficult to operate certain types of institutions (Streeck 2009).

In short, if we want to explain cross-national variation in macro-outcomes, such as levels of inequality, redistribution, state intervention, political stability, social cohesion or democratic stability, there is a strong case for moving beyond studies that seek two or three dispositive variables toward analyses focused on the social ecology of each country and how it is built. Such analyses need not be abstruse or ornate. Their defining feature would be an effort to describe how politics is structured in each country with some attentiveness to the ways in which
the institutional practices, cognitive frameworks and network relations interact. There are already some models for that type of inquiry and, by refining them, we can expand and improve our fundamental models of politics (cf. Katzenelson and Zollberg 1986; Pontusson 1988; Huber and Stephens 2001).

**Politics as Structured in Time**

One of the implications of this argument is that politics is structured not only in space but in time (Pierson 2004). By this, I mean that some kinds of outcomes may be more likely in some temporal contexts than in others and that the same causal factors may have more impact in some periods than in others. There are two respects in which politics might be structured in time.

The first follows from any perspective attributing causal force to the social ecology of political relations. There are some respects in which ‘making social policy’ is a different project in one era than it is in another because the social ecology of policy-making varies across eras. This is a consequential assertion. It calls into question images of politics as a seamless terrain in which variables operate with consistent force regardless of the historical context in which they occur. It suggests that politics is structured over specific periods of time by relatively durable complexes of institutions, social networks and cognitive templates and asks political scientists to pay more attention to period effects.

The second respect in which politics may be structured over time bears on processes of institutional change. Here, the issue is whether history should be seen as a process of constant flux or one syncopated into different kinds of periods, such as critical junctures, marked by major changes in institutions or cognitive templates, and periods of relative stability, characterized by small changes in the institutional practices and cognitive frameworks conditioning politics (Collier and Collier 1991, Katzenelson 2003, Capoccia and Keleman 2007). This distinction is important because, if history is divided into such periods, there may be significant variation in the
factors driving political outcomes across them, such that we need to know what kind of period is being examined in order to explain any outcome well.

From the perspective of the second wave of work in historical institutionalism, these propositions are antediluvian. Its assertion that consequential institutional change occurs incrementally over time calls into question views of history as a process syncopated into critical junctures and periods of relative stability. This is a serious challenge because there are many insights in this second wave of historical institutionalism and good empirical studies showing that actors tinker with institutions in incremental ways that can indeed cumulate into transformations in policy (Thelen 2004, Palier 2005, Streeck and Thelen 2005b). This literature can be taken to imply that history should be seen as a constant flux.

I will argue, however, that it would be premature to conclude that processes of institutional change display no historical rhythm, and that the core insights of the second wave of work in historical institutionalism support such a view. Chief among them is an insistence on seeing institutions as the product of social coalitions, a key proposition for institutional analysis with many powerful implications. At first glance, that proposition may seem to relegate institutions to such a subsidiary role that it no longer makes sense to think of politics as structured across space or time. However, I will argue that a coalitional approach to institutions is entirely compatible with the view that history is textured into periods across which the character of politics varies. Moreover, we can build on this insight to open up new lines of inquiry into how politics becomes structured and why its structure might vary across countries or issue areas.

A Role for Conjuncture

My argument proceeds from the proposition that institutions are created by specific sets of social coalitions composed of actors powerful in the relevant arena, and that established institutions persist only as long as they retain an ample supporting coalition, even if some members of that coalition change over time. This is a prominent contention in the work of Swenson (2001, 1991),
Thelen (2004) and other contributors to the second wave of historical institutionalists. Swenson documents the point through careful studies of industrial relations and social policy-making in Sweden and the United States, and Thelen does so by comparing systems for skill formation in Britain, Germany, Japan and the United States.

To some, this coalitional perspective on institutions may seem uncontroversial. Taken as a statement about the conditions underpinning institutional persistence and change, however, it stands in contrast to prominent alternatives that attribute the persistence of institutions to taken-for-granted logics of appropriateness or to the equilibrium qualities of institutions as vehicles for coordination as well as to views that associate institutional change with the puzzling out of policy problems, the diffusion of institutional forms across borders or reflexive responses to economic developments (cf. March and Olsen 1989, Calvert 2005, Thelen 2004, ch. 1).

If institutions are built via the formation of new social coalitions, we should ask: how are new social coalitions formed? At a basic level this must involve a process in which multiple actors reinterpret their interests in ways that allow them to join together behind a common project and assemble the power resources necessary to ensure that the views of the coalition are addressed (Offé and Wiesenthal 1986, Hacker and Pierson 2002, cf. Swenson 2004).

How, then, do actors reach a new set of views about their interests? To this question, some accounts cite shifts in material circumstances, on the assumption that actors are motivated by perceptions of economic interest that emerge unambiguously from changes in the material world. Where this is correct, the formation of new coalitions is easy. As I have suggested, however, such barebones accounts understate the difficulties confronting those who want to form a new coalition sufficiently powerful to implement major institutional changes. Discontent with existing institutions has to reach certain levels. Actors have to be convinced they should abandon procedures with which they are familiar to enter uncertain territory. They have to develop new interpretations of their circumstances, find ways of proceeding, and agree that one, as opposed to
another, reform is most likely to address their problems. Sometimes, they have to be persuaded to enter costly contests for power.

In other words, the process whereby a new coalition forms behind important institutional changes, even within one policy area, is far from mechanical. A wide range of factors have to line up, and many of those, such as the availability of certain ways of thinking about policy, the presence of particular economic conditions or an increase in the salience of certain issues, will be features of particular conjunctures, rather than durable features of the political setting. In other words, to borrow a term from Ragin (1989), the process whereby new coalitions are formed can be described as one based on ‘multiple conjunctural causation’ – understood as a process in which multiple factors, some of which may be unique to particular historical conjunctures, have to come together to induce the relevant actors to unite behind change (see also Skocpol 1979). This image conforms well to accounts of coalition formation behind many cases of institutional change, ranging from the reform of health care systems to the transformation of economic policies (Starr 1984, Skocpol 1997, Immergut 1992, Hall 1993).

Two important implications follow from this point. The first is that major institutional changes are likely to take place in a concentrated burst at particular conjunctures. Small-scale institutional change marked by ‘defection from below’ or ‘reform from above’ may well be continuous in most domains, but major institutional changes are likely to require exceptional circumstances, because change of this magnitude depends on coalitions that are especially difficult to build. They cannot be constructed at all points in time.

The second implication is that conjunctures of major institutional change are likely to be characterized by a particular kind of politics, intrinsically more open than usual and driven by a number of causal factors that do not always play prominent roles in the determination of political outcomes. A number of scholars have made such observations. Swidler (1986) notes, for instance, that ideologies often become important in unsettled moments, when the standard ‘strategies for action’ have been discredited (cf. Hall 1993). Sewell (1996) sees a role in such
contexts for ‘transformative events’ that act as catalysts for the transformation of institutions and worldviews. Some scholars of American politics have described the politics of ‘critical realignment’ as different from those of normal politics (Burnham 1971, cf. Mayhew 2002).

There are some appealing features to this view of major institutional change as the product of coalition formation in contexts of multiple conjunctural causation. There is a robust role for agency in the process, since institutions are seen as the product of actors who join together for that purpose, and this view accommodates the possibility that some actors may be prime movers in coalition formation, while others play supporting roles (Korpi 2006). Moreover, it shows how the political imagination of a particular era leaves its mark on history, as institutions emerging from the worldviews and decision-making of a particular conjuncture go on to structure practice in subsequent periods. This perspective sees history as a syncopated process, divided into conjunctures during which concerted efforts are made to put important new institutional or cognitive frameworks in place, and periods in which those frameworks provide a relatively stable structure for politics or policy-making. The timing and pace at which such conjunctures appear will vary, of course, across institutional fields. This is not a ‘big bang’ theory suggesting that all the institutions of the polity change at once. (Orren and Skowroneck 2004). But it contends that there is a role for conjuncture in the creation of structures.

**Explaining Stability**

Why then are these conjunctures followed by periods of relative institutional stability? From the perspective outlined here, which acknowledges the potential for incremental institutional change, this is the more difficult question. Moreover, if we adopt a coalitional perspective on institutions, these questions cannot be answered by reference to the ‘taken for granted’ or ‘equilibrium’ qualities of institutions, because the persistence of particular institutions must rest on the stability of the coalitions that support them. From this perspective, institutions are creatures of coalitions rather than the residues of economic or ideological circumstances. Thus, the issue has to be: why
might the coalitions on which institutions depend remain relatively stable over some periods of time? Why might coalitional politics be more orderly in some periods than at other critical junctures?

The answer lies in the nature of institutions themselves. Although created by social or political coalitions, many institutions have features that help to consolidate the very coalitions that keep those institutions in place. In large measure, this is what it means to say that institutions structure politics. The institutional practices and associated worldviews developed in previous conjunctures, therefore, often give rise to periods of stability. There can be variation across institutional fields, of course, in the mechanisms that consolidate such support. Thus, some institutions are more stable than others. However, the literature points to five types of mechanisms whereby institutions help sustain the coalitions on which their continued existence ultimately depends.

The first of these mechanisms follows from the benefits a new set of institutions provides. A social program that confers new benefits on a particular class of recipients is the paradigmatic case, although analogous processes pertain to many kinds of tax, spending and regulatory policies. As Pierson (2000) notes, actors may even come to see those benefits as entitlements. Thus, both the benefits that accrue from an institution and shifts in the worldviews about social justice that often accompany them reinforce institutions. Behind this mechanism lies a more general feature of human behavior. Kahneman and Tversky (1979) report that people are typically more concerned about losing something they have already gained than about gaining something they do not yet have, even if it is of greater value. This helps to explain why actors offered another policy promising even greater benefits do not switch their allegiance as often as a simple interest-based calculus might suggest. Mechanisms based on entitlement are likely to operate most powerfully in contexts where institutions deliver a substantial set of visible and well-defined benefits.
A second mechanism follows from the fact that the political world is beset by high levels of uncertainty, especially about the outcomes likely to flow from new institutional arrangements. In many cases, uncertainty about the ‘instrumental beliefs’ that specify the concrete effects of a change in policy or regulatory regime may lead actors to hesitate to shift their support away from existing arrangements whose effects are well-established (Goldstein and Keohane 1993). As Shepsle (1989) notes, where the issue is whether to change the procedures for making decisions, this ‘wedge of uncertainty’ is likely to be even more important. Even if actors can see some immediate gain to changing those procedures, they can rarely anticipate fully how other matters will be treated under them, and thus whether procedural change will issue in long-term benefits. Mechanisms based on uncertainty are likely to be especially important where technically-complex policy areas or the institutional rules assigning power over the allocation of resources are at stake.

A third set of mechanisms operate through the ways in which institutions distribute power. As Moe (2005) points out, institutions do not simply resolve collective action problems; many also affect the distribution of power in ways that tend to privilege the social coalition that put them in place (Knight 1992). Institutional arrangements that dictate who has jurisdiction over a matter, the composition of agendas, or the decision-rules used to resolve matters can all bias the course of decision-making in ways that privilege the coalitions benefiting from existing institutions (Marshall and Weingast 1988, Lukes 1974). Although legislators elected under one set of rules sometimes change them, they do so rarely and not usually to their own disadvantage. Institutions can also limit the power resources available to actors likely to challenge them. Policies that increase the dispersion of income, for instance, may shift more people into low-income positions where political participation is low (Pontusson and Rueda 2009). Mechanisms that distribute power underpin many of the institutions distributing economic resources in society.

As Pierson (2000, 2004) has observed, a fourth set of mechanisms depend on the network or coordination effects institutions can have. Many institutions induce actors to make
investments in new kinds of assets or behaviors, in order to benefit from the advantages offered by the institution. To take advantage of a regulatory regime, firms may invest in particular endeavors. Citizens may invest in certain sets of skills to take advantage of available production regimes or adjust how they save for retirement in light of existing tax policies. Where it is costly to change those investments, these actors are likely to provide continuing support for the institutional arrangements that induced them. Mechanisms based on coordination effects operate especially strongly in the political economy, where firms and other actors often make substantial investments based on existing regulatory regimes and institutional structures (Hall and Soskice 2001).

A related mechanism turns on the interconnectedness of institutions. In many instances, the size of the benefits actors derive from one set of institutions will depend on the presence of other institutions governing related sets of endeavors. In such cases, actors will join a coalition dedicated to changing one set of institutions only if they can anticipate that a successful coalition can also be formed to make changes in corresponding institutions. Even when that first coalition is feasible, the others may be difficult to construct, either because they entail mobilizing actors without a stake in the first or because conditions in other arenas continue to make existing institutions attractive there. Thus, the interconnectedness of institutions often acts as an impediment to institutional reform.

This type of mechanism operates in both the polity and political economy. Swenson (2001) observes that institutional arrangements in industrial relations deeply conditioned the willingness of employers, in both Sweden and the U.S., to support reforms to social policy. Goyer (2006) finds that the fate of efforts to reform corporate governance in France and Germany turned on variations in the character of labor relations in each country. Hall and Soskice (2001) argue that there are many such institutional complementarities in the political economy. Mechanisms based on interconnectedness will underpin institutions whose benefits depend on the presence of ancillary institutions that are difficult to change.
In sum, a variety of mechanisms associated with the very character of institutions can reinforce the power or motivation of the coalitions on whose support those institutions depend. They explain why politics is often structured across time and space by relatively durable combinations of institutions generating distinctive patterns of action. Despite a certain amount of continuous incremental adjustment, these mechanisms make periods of institutional stability possible, until they are punctuated by conjunctures of more intense conflict.

**Situating Conjunctures**

If it is possible to explain institutional stability in this way, what gives rise to such critical conjunctures? We do not yet have good answers to this question because there have been relatively few systematic comparative studies of this issue across countries and domains of politics or policy-making (cf. Collier and Collier 1991). However, the literature contains some suggestions. A number of studies emphasize the impact of developments exogenous to the relevant institutions themselves, often geo-political or economic in nature, which interrupt the flow of benefits from existing institutions, thereby shaking confidence in them and rendering institutional innovation more urgent. Among the developments most often associated with such conjunctures are instances of war, regime change, economic depression, financial crisis, deindustrialization, and accelerated international integration (Skocpol 1979, Ekiert and Hanson 2003, Gourevitch 1986, Frieden and Rogowski 1996, Iversen and Cusack 2000). Some of these kinds of events have had dramatic enough effects to precipitate institutional change across multiple domains. In any one domain, however, analogous developments of more restricted ambit can precipitate major reform efforts.

Shifts in circumstances that are more gradual can also erode the value of institutions to members of the coalitions that support them. If *ad hoc* adjustments to institutional practices in the wake of such circumstances do not generate new coalitions of support, growing disaffection, sometimes marked by ‘defection’ from those practices, can lead to institutional crises, marked by
concerted efforts to secure more major reforms (Thelen 2004, Streeck and Thelen 2005a). The recent integration of global markets for goods, capital and labor, for instance, has precipitated intense bursts of reform in some policy domains, including financial regulation in Britain, economic policy in France, and social policy in Germany (Moran 1991, Hall 1986, Streeck and Trampusch 2005).

As Thelen (2004) and others have observed, however, the impetus for major episodes of reform need not be exogenous to existing institutional arrangements (Greif and Latin 2004). Even where exogenous developments are important, it is often effects produced by the combination of those developments and existing institutions that erode the coalitions supporting them. Institutions themselves can have unintended effects that inspire progressive disillusionment with them over time; and most institutional reforms leave in their wake a minority who would have preferred different institutions, ready to form the core of a coalition for change (Clemens and Cook 1999, Moe 2005, Streeck and Thelen 2005a). Thus, as adverse unintended effects accumulate, in the absence of offsetting adjustments, actors defecting from their support coalition can swell the ranks of the aggrieved sufficiently to precipitate a conjuncture in which more radical reforms are attempted.

In short, to argue that history is syncopated into junctures separated by periods of stability need not imply that institutional change never occurs during periods of stability. We can acknowledge that there is incremental institutional change during such periods, while noting that they are often separated by critical junctures, marked by more widespread or open contestation, when large-scale institutional reforms are at stake. In each case, the relevant politics is coalitional, but the processes of coalition formation during critical junctures are likely to involve a more tumultuous politics.

This perspective makes it possible, in turn, to raise some important issues about the relationship between critical junctures and periods of stability. One of the implications of the analysis is that what happens during periods of stability can condition both the timing of critical
junctures and the course of events during them. As noted, cumulating defections from existing practices or a failure to adjust institutions to shifting circumstances can precipitate a critical juncture. The course of French history in the run-up to the revolution of 1789 provides a vivid illustration of this point (Skocpol 1979, Sewell 1984). Moreover, the character of the adjustments made to institutions in the preceding period can condition the course of events during a critical juncture. Morrison (2009) argues, for instance, that key features of the 1832 Reform Act passed during what is widely recognized as a critical juncture in the process of British democratization depended on the institutional arrangements regulating relations between Crown and Parliament that had been put into place during preceding decades. Those arrangements weakened the Crown sufficiently to embolden reformers, shifted the axis of conflict enough to allow for the formation of a successful reform coalition, and oriented the reform toward corruption. In short, by stressing the coalitional underpinnings of institutions, we can lay the groundwork for more nuanced analyses of how the politics of stability conditions what happens during critical junctures.

**Implications for the Study of Politics**

I have argued that politics should be seen as a process structured by institutional practices, cognitive frameworks and network relations, whose shapes generate distinctive types of politics across territorial units and periods of time. What are the implications for the study of politics?

At the most general level, my point is to encourage scholars to cultivate a greater sensitivity to the overarching models of politics deployed in their analyses. Instead of thinking about political explanation as a matter of identifying the list of variables that might impinge on an outcome, we should be thinking about how these variables interact with each other in specific contexts to form distinctive patterns of politics across space and time.

Although political science acknowledges interaction effects, because of limitations in our data sets and estimation techniques, intensive exploration of them is all too rare (cf. Ragin 1989). As a result, whether out of conviction or inadvertence, many analyses imply that politics is driven
almost entirely by variation in a small number of powerful factors, operating independently of each other and with the same force in all times and places, regardless of context effects. Of course, that may be true for some factors, but we should not adopt such views unreflectively. Major political phenomena, such as levels of redistribution or the quality of democracy, may be determined by a wider range of factors than stripped-down models allow. Finding statistically-significant coefficients for a few factors, or their descriptive equivalents, without taking other salient variables and their interactions into account, does not necessarily show that those factors drive the outcome; it may simply reflect errors of specification. There is real value to remaining sensitive to the overarching models of politics that lie behind our analyses.

How do we know what kind of variables to bring into these analyses? There is no simple answer to that question, since much will depend on the phenomenon being studied. But one of the implications of this argument is that there is often a case for including key features of the institutions, cognitive frameworks, and network relations that tend to structure politics. Rather than treating those as background factors whose effects wash out across cases, we should take seriously the possibility that they may be interacting with other variables to produce the relevant outcomes. In recent years, political scientists have shown increasing interest in institutions, but we are still not especially attentive to how they interact, and it has become conventional to treat cognitive frameworks as mere reflections of the material world. Moreover, by bringing cognitive frameworks and social networks into the analysis, we could improve our understanding of the relationships between politics and the structure of social relations (Abrams et al. 2010, Hall and Lamont 2009).

Similar issues are evoked by the argument that politics is structured over time. There is a real possibility that politics at critical conjunctures of major institutional change will be different enough from the politics of institutional stability to demand a somewhat different kind of analysis. In periods of stability, it will be important to consider the institutional practices, cognitive templates or networks that structure politics, as well as how they interact with other
causal variables. The impact of social democratic governance, for instance, may be tempered by the cognitive frameworks distinctive to some countries or eras. This perspective suggests that the coalitional politics sustaining institutions will be of interest, even when it is not tumultuous, and Streeck and Thelen (2005a) identify some dimensions of it worthy of analysis.

To explain outcomes at critical conjunctures, when more dramatic shifts in institutions and the coalitions underpinning them are possible, we may need to consider an even wider range of variables, including factors that shake the confidence of the populace in existing institutions, the shifting worldviews of the actors, the role of events in those shifts, and the ways in which actors are motivated and mobilized. Although conjunctural developments are affected by existing practices, some of those practices may be in flux, and the problem will be to explain what pushes them in certain directions (Sewell 2005). Weyl and (2008) conceptualizes the problem in elegant terms as one with a ‘demand’ and ‘supply’ side in which the availability of new models derived from foreign experience plays an especially important role. As Capoccia and Keleman (2007) note, process analysis may also be useful for explaining how coalitions are formed in such contexts (see also Hall 2003b).

Of course, it is impossible to incorporate every context effect into an analysis, and I am not suggesting we should. Greater attention to a few of the most important will take us a long way. We should be guided not only by the results of previous empirical inquiry, but by overarching theories of how politics work. Before turning our attention to finding statistically significant regression coefficients, there is a strong case for scrutinizing and developing the the images of politics that underpin our models.

This perspective does not militate against the use of statistical methods for testing models of politics. However, it suggests estimations should be used more creatively with an eye to the viability of alternative models of politics. In estimations on panel data, we should ensure we are not missing the ways in which history is syncopated over time. That entails looking for period effects within the data, and specifying the estimations in ways that allow structural features of the
units that persist over discrete periods of time to mediate the impact of the explanatory variables
(cf. Powell 2009). In many instances, it may be useful to move beyond fixed effects estimations
toward multilevel hierarchical models (Steenbergen and Jones 2002, Huber et al. 2005, Freitag
and Bühlmann 2009).

This perspective also mandates more careful specification of the time-lags associated
with particular causal factors. Some variables, such as a change in partisan governance, may
have immediate effects on the outcomes. Others, such as new sets of institutional arrangements
may have effects that show up only over long periods of time (Huber and Stephens 2001, Pierson
2004). Some may acquire causal force only after they reach certain thresholds. As Abbott (1988,
2001) has noted, the causal relations behind politics do not all correspond to a general linear
model, and allowing for that requires attention to issues of specification and inventiveness in
estimating different kinds of effects (Franzese and Kim 2007).

The argument advanced here, that politics can be divided into periods of stability,
punctuated by efforts at major institutional change, is highly general and tentative. Although this
is a model in which political scientists have long been interested, there is much we do not know
about such matters. The frequency with which critical conjunctures occur and what is
accomplished in them may vary across domains of politics and policy-making. In the sphere of
social policy, such conjunctures seem to occur in the developed democracies with some
frequency, but less often with respect to electoral rules. We need to know more about how and
why the pace of these conjunctures varies across institutional fields and what determines it. In
the terms advanced here, this is not mainly a matter of contingency or a function of exogenous
events. The process turns on the durability of the coalitions underpinning institutions, which
should depend, at least partly, on the presence of capacities for the incremental institutional
adjustments that sustain such coalitions. We need to know more about how such capacities are
constituted and whether they are affected, for instance, by the ‘strategic capacities’ of the actors
or the role of the state as an architectonic actor in some domains (Martin and Thelen 2007).10
In short, the contention that politics is typically structured over time should be a starting point, rather than the endpoint, for inquiry (Lieberman 2001). Without abandoning the basic division of politics into periods of relative stability and conjunctures of unsettled politics, it may be possible to draw more nuanced distinctions between the types of politics found at different points in time, based on the character of coalition formation and the openness of institutional practices at such moments.

By the same token, there is value in looking more closely at how the structures of polities are built up over time, adopting a longitudinal perspective on issues that are more often examined in cross-sectional terms (Pierson 2004). For instance, how are national structures of inequality constructed over time? Thelen’s (1984) argument that new institutions are often layered on old ones is a step in this direction but, as she notes, layering does not simply expand the range of institutions actors have available for their purposes. It can erode or reinforce the durability of other institutions. In much the same way, the presence of particular forms of social organization may be crucial to the maintenance of cognitive frameworks, and the development of some kinds of economic practices may reinforce particular political institutions (Berman 1998, Pontusson 1988, Iversen and Soskice 2009b). There is much still to be learned about processes of co-evolution among the structures of the economy, polity and society.

For this purpose, it can be revealing to look at contemporary politics through the lens of political development (Hall 2003a, 2007, Kesselman 1970). Some excellent single country studies take this approach, and scholars of American political development have blazed the path (Manow 2001, Rosanvallon 2007, Carpenter 2001, Schickler 2001, Orren and Skowroneck 2004). However, there is room for much more work on the comparative political development of the industrialized democracies (cf. Collier and Collier 1991). Moreover, the implication of this coalitional analysis is that institutional development over the long term is unlikely to be explained by variation in a small number of structural factors. As Capoccia and Ziblatt (2010) note, the process is likely to be a syncopated one in which developments at critical junctures play
especially important roles. The outcomes of such conjunctures put in place institutional or cognitive structures that can bias the subsequent direction of development for many years. The prominence accorded issues of corruption during the English Civil War of 1640, for instance, structured the issue space of British politics for two centuries, as did the character of events in the French revolution of 1789 (Morrison 1999, Sewell 2005). Conjunctures should be seen, not as mere blips on the radar screen of long-term institutional development, but as moments when the political imagination of particular times and places can be etched into longer-term processes of political development.

To see politics as a process structured across space and time brings history back into political science, as an active process unfolding over time rather than simply another set of cases (Pierson 2004, Katzenelson 2003, Haydu 1998). To take such a perspective does not entail turning political scientists into historians. The search is still for fruitful generalizations about the factors conditioning the formation of coalitions and the ways in which coalitions drive institutional development. Ultimately, however, the result should be deeper and more realistic models of politics.
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Notes

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1 For illustrative purposes, my focus is on a very recent literature. Older cognate works on the development of welfare states were sometimes more structural in orientation. This account is influenced by the insightful analysis of Lupu and Pontusson 2009.

2 Whether such effects are consistent over time can be assessed, of course, using conventional statistical techniques, although often they are not. With fixed effects specifications, the impact of country-specific factors on the outcome can also be assessed, but those specifications do not evaluate the impact of country-specific factors on the impact of the other causal variables.

3 Huber and Stephens (2001) draw our attention to such issues and cope with some of them, for instance, by estimating the impact of cumulative periods of social democratic governance rather than of social democratic governance at any one point in time (see also Brady et al. 2003).

4 Rational choice institutionalism has also told us much about how institutions structure politics across space but says much less about how institutional structures change over time (Hall and Taylor 1996, Thelen 2004, ch. 1, Weingast 2002, cf. Calvert 1995).

5 Streeck and Thelen 2005b: 15. A similar view is expressed in Hall and Thelen (2009). Some years ago, Geertz (1964) chastised political scientists for taking a similar view of ideology, as a ‘mask or a weapon’, rather than seeing it as a constitutive component of action (see also Althusser 1971).

6 This is Kurt Weyland’s intriguing phrase in remarks at a Workshop on Democratization in Europe, Harvard University, October 2008.

7 In principle, of course, actors could be endowed with other kinds of fundamental preferences, including ones that are not material, but, in practice, few political economists assume such preferences.

8 In some respects, this point mirrors Ragin’s (1989) call for ‘case-oriented’ as opposed to ‘variable-oriented’ research.

9 Note that a conjuncture is defined here by the effort to assemble a new coalition behind major institutional reforms. Cf. Collier and Collier (1991: 29) who define a conjuncture as “a period of significant change.”

10 David Soskice has long emphasized the importance of ‘strategic capacity’ in such contexts.