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Sea exploration, no drilling in the South China Sea, no SUV replacements, no renewable energy project can be brought in at a sufficient rate to avoid a bidding war for the remaining oil.⁷

Deffeyes pays no attention in his argument, except by a footnote reference, to the economic theory under which the Hubbert estimate has to be rejected.⁷ Deffeyes says nothing about why his approach should be regarded as better than Adelman and Lynch's (1997) approach. What is involved, however, is the economists' challenge to the reasoning of Hubbert and others, a challenge grounded in economic theory (Adelman 1997).

At one level, Adelman and Lynch challenge empirically. After the fact they say, Hubbert's numbers were wrong, as were the numbers of others who are respected and influential.

Adelman and Lynch (1997, 56) describe Hubbert's bell-shaped curve of ultimately recoverable reserves (URRs): "Hubbert correctly predicted that US crude oil output would peak in 1970." But they raise the expected economist's question, "was it the result of resource exhaustion *or* of cheaper oil imports now freely available?"

They say that discoveries continue, and the reserve number continues to get bigger. Moreover, they say that the natural gas numbers continued to show production above Adelman and Lynch's estimated peak and continue rising. They, as would be expected for economists, explain it as the result of the Natural Gas Policy Act and the end of end-use regulation.

Hubbert gets emphasis here because his method is so famous, and because it is the vehicle for Deffeyes's analysis. However, they have a trenchant comment on a consulting firm in the industry known as Petroconsultants. Petroconsultants had in 1986, estimated that decline before 1990 was "imminent" and "unstoppable." They say: "This was not only wrong, it was the contrary of truth. Ten years later non-OPEC proved 15% more (where decline had been thought unstoppable); outside the US, 35% more."

Lovins does not expressly take up the question of the end of oil, for he stands as perhaps the most noted exponent of efficiency, for the thesis that the issue does not have to be faced at all. The executive summary of his most recent book claims: "*Winning the Oil Endgame* offers a coherent strategy for ending oil dependence, starting with the United States but applicable worldwide." Lovins (2004) continues:

There are many analyses of the oil problem. This synthesis is the first oil *solution* — one led by business for profit, not dictated by government or for reasons of ideology. This road map is independent, peer reviewed, written for business and military leaders, and co funded by the Pentagon. It combines innovative technologies and new business models with uncommon public policies: market oriented without taxes, innovation driven without mandates, not dependent on major (if any) national legislation, and designed to support, not distort, business logic.

⁷ "One of the best critical rejections of Hubbert's approach," he says, "is M. A. Adelman and M. C. Lynch (1997)" (Deffeyes 2001, 191 n. 9).

5. CONCLUSION

This chapter suggests both a practical challenge and an intellectual challenge. The practical challenge, especially for governments, is that energy depends upon knowledge and upon money.

Choices have to be made.

Each choice has been associated with some significant detriment, though the advocates of each choice will generally tend to minimize the detriment, overstate the advantages. If the Hubbert thesis is basically sound, then an upward pressure on prices is to be expected. Another practical factor relates to the effect in the market of Russia as seller and China and India as buyers. As noted at the outset of the chapter, there are also the considerations of the poor countries.

In this very decade, as well, there is the question of the current policy choices, of the institutions through which choices will be formulated, and of the interests by which choices will be driven. In the European and American context, the issue is: what is the practical future for coal? Is coal sequestration to be taken seriously? There are two levels of consideration. At one level, there is the purely scientific question of whether the sequestration of carbon dioxide makes sense. At another level, there is the question of what degree of policy consideration the idea is receiving. Britain and Europe are contra-carbon which almost surely leads either to “green” policy preferences or to nuclear policy preferences. What also remains is the concept of “The Hydrogen Economy,” of whether as an energy matter it is feasible, and of what capital requirements and technological developments are feasible in a period of twenty or thirty years.

Finally, there is “the conceit of journalism.” Similarly, the language of crisis and threat is often adopted in an exaggerated way that does not bear close analysis. Deffeyes (2001) for instance, anticipates the decline of available oil and the competition for that oil by money.

As a matter of style, it might not have suited to say the “Hubbert’s Peak indicates that oil production will reach its apex some time within the next four years and will begin to decline so that the production level sixty years away will be about 20% of what it now is.” But that is what the author, Francis S. Deffeyes (2001) does say. He does say that production will peak and there is nothing anyone can do about it. He estimates the 20 per cent date in a very simple way. It is when his two-year-old granddaughter will reach retirement age, presumably sixty-three years away. “By the time you reach retirement age, Emma, world production of oil (the kind that’s fun to drill for) will be down to a fifth of its present size.”

Notice, then, the language of alarm that follows: “At least, let’s hope that the war is waged with cash instead of nuclear warheads.” For what reason, indeed, would it be logical to imagine that oil shortage would lead nations to nuclear struggle? Whether any wars have occurred between major states for oil is debatable, though perhaps a case can be made. What prospect has to do with Hubbert’s Curve is most obscure.

I conclude with reference to some other intellectual issues that also relate to energy policy.

1. There is need for some thought about the very meaning of “policy;” and its relation to law and to public–private relationships. *Black’s Law Dictionary* defines “public policy” as “broadly, principles and standards regarded by the legislature or the courts as being of fundamental concern to the state and the whole of society” (Garner 1999). For a political scientist, what *is* empirically “of fundamental concern to the state and the whole of society?” Moreover, the dictionary continues quoting an authoritative source, to say, “The policy of the law, or public policy, is a phrase of common use in estimating the validity of contracts.” This issue entered natural gas industry politics in the 1980s when some buyers found themselves committed to old contracts under which, as it turned out, the prices they had to pay were well above the prices at which they could sell.
2. The energy arena involves a good deal of reference to “the geopolitics of energy.” That may demand new attention to its meaning in political science. This terminology seems to have little or nothing to do with the concept of geopolitics (systematic ability to predict political outcome because of location of conflicting or cooperating parties) as it once existed in such work as that of Halford J. Mackinder (1943) or even in the work of Harold Sprout and Margaret Sprout (1965), who were senior figures in American political science in the 1950s. But there is new thinking along these lines from the left as expressed in the writing of Michael T. Klare (2001) and in research projects such as that currently centered at the Baker Institute of Public Policy, Rice University, which has a project on “The geopolitics of energy in northeast Asia.”⁸
3. On a global basis, it is important to recognize something else. While it is not well analyzed in this chapter, or anywhere in political science to the author’s knowledge, the energy industries could be described as some mix of oligarchy, oligopoly, and oligopsony. The dominant roles are played by one or two large governments, a small number of medium-sized governments, and the rest of the world. One could repeat the previous sentence substituting the words “sellers” or “customers.”

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⁸ For details, see www.rice.edu/energy/research/asiaenergy/index.html (accessed 5 Apr. 2005).

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CHAPTER 44

REFLECTIONS ON POLICY ANALYSIS: PUTTING IT TOGETHER AGAIN

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THE attempt to pin down a chameleon concept like “public policy” tends all too often to become an exercise in anatomy rather than physiology. The bones are there, right down to joints of the little finger. They can even be put together, rather like an exhibit in a natural history museum. But the creature itself, the sense of what drives it and shapes its actions, remains elusive: a victim of the academic drive to taxonomize everything in sight. To make this point is not to criticize the editors. Their strategy accurately reflects the state of the field and the end product mirrors its diversity. As Robert Goodin has put it in a different context, “theorists are inveterate product-differentiators” (Goodin 2000, 523). Different disciplines, and different sects within disciplines have fought over the body of public policy, all seeking to impose their own definitions of the subject and to patent their own analytic methodology. To set out these varied and competing perspectives is in itself, a valuable pedagogic exercise but risks analyzing the subject out of existence.

In what follows we shall argue for a theoretically less ambitious but (in our view) practically more useful strategy. We define public policy quite simply. It is what governments do and neglect to do. It is about politics, resolving (or at least attenuating) conflicts about resources, rights, and morals. We sideline the issue of whether policy analysis is about understanding or prescribing by claiming that no

prescription is worth the paper it is written on if it is not based on an understanding of the world of policy making. If prescription (or advice to policy makers) is not based on such a foundation of understanding, it will either mislead or fall on deaf ears. In turn, understanding depends not just on seeing policy making as a strange form of theater—with the analyst in the first row of the stalls—but on trying to capture the intentions of the authors of the drama, the techniques of the actors, and the workings of the stage machinery. Empathy in the sense of capturing what drives policy actors and entering into their assumptive worlds, is crucial. In adopting this view we place ourselves unapologetically in the tradition of those who see policy analysis as an art and craft, not as a science (to use Wildavsky's 1979 terminology)

By assumptive worlds (Vickers 1965) we mean the “mental models” that “provide both an interpretation of the environment and a prescription as to how that environment should be structured” (Denzau and North 1994, 4). Policy actors have theories about the causes of the problems that confront them. They have theories about the appropriate solutions. To take an obvious example: poverty can be seen as reflecting social factors outside the control of individuals or the result of individual failings, and very different policy responses follow depending on the initial diagnosis made. There is additionally and importantly, a normative component to such mental models. What counts as a problem depends once again on assumptions about the nature of society and the proper role of government. Problems, as the constructivists are the latest to remind us, are not givens but the product of social and political perceptions. If AIDS is seen as a judgement of God punishing sinful behavior, then governments will see this as a matter for the preacher, not for the politician. When such mental model or assumptive worlds are tightly organized, and internally consistent, then traditionally we tend to call them ideologies.

What other fundamental tools of understanding do we need to make sense of what governments do? Parsimoniously, we would suggest only two. First, we need an analysis of the institutions within which governments operate. In contrast to much of the literature, we define “institutions” narrowly: the constitutional arrangements within which governments operate, the rules of the game, and the bureaucratic machinery at their disposal. Self-evidently the process of producing public policy will be very different in a country with a Westminster-type constitution and one with a US-type constitution with its multiple veto points. Second, we need an analysis of the interests operating in the political arena: interests which may be structured around either economic or social concerns (which may be either self or other-regarding) and serve both to organize and articulate demands on governments and to resist measures which are seen to be inimical by those interests.

In what follows, we develop these notions. The first section's starting point is the uncontentious proposition that what (democratic) governments do—that is, the policies they advance and implement—reflect their larger concerns about gaining (and maintaining) office and doing so legitimately. Uncontentious, even banal though this proposition may appear to be, it is much ignored in the more rationalistic conceptions of policy analysis. The second section argues that individual policy

outputs need to be interpreted in the context of the overall policy portfolio. That is, governments are almost always engaged in a complex balancing act, given that the demands for policy action usually exceed the supply of the administrative, financial, and political resources required to meet them. The third section explores the importance of taking the historical dimension into account when analysing public policy. The fourth section examines the promise and perils of cross-national analysis, and its role as a check on overdetermined national explanations of why governments do what they do. As a final coda, we briefly restate the case for eclecticism in public policy analysis.

Throughout we illustrate our arguments with examples drawn from history. And even those examples which were contemporary with the writing of this chapter in 2004, will have become history by the time this chapter is read. Accordingly, where appropriate, footnotes provide the necessary background information about the events concerned.

1. THE DOUBLE IMPERATIVE

To define public policy as what governments do may seem a rather simple-minded opening gambit. In fact, much follows from it. It suggests that before analyzing the genesis and life-cycle of specific policies—the focus of most of the public policy literature—we should first consider some of the larger concerns of governments: the context in which specific policy decisions are taken and which helps to shape those decisions. Two such concerns, we would suggest, underlie the actions of all governments (at least in Western-style liberal democracies.) The first is to gain office and, having done so, to maintain their own authority and the legitimacy of the political system within which they operate. The second is to stay in office. We explore each of these points in turn.

The authority of governments, and the legitimacy of political systems tends to be taken for granted in the public policy literature. The centuries-old debate among political philosophers about the nature of, and justification for the exercise of political power is left to another branch of the academic industry. And even the more recent political science literature expressing worries about the decline of active support for democratic regimes and engagement in civic participation (Putnam 2001)—as shown, for example, by the fall in voter turnout at election times—has taken a long time to percolate into the academic analysis of public policies, particularly the economic variety, with some notable exceptions.

Do they, however, figure in the concerns of policy makers? It would be absurd to suggest that presidents and prime ministers spend sleepless nights worrying explicitly about how to maintain their authority and the legitimacy of the political system, though occasionally there are spasms of interest in such notions as social capital.

Indeed it can be argued that it may be in their self-interest to gain short-term advantages for themselves—by deception or concealment—at the price of undermining confidence in the system in the long term. Nevertheless, balancing such incentives, concerns about legitimacy and authority are woven into the fabric of policy making. If they are largely invisible, it is precisely because they are so much part of normal routine. Before governments decide to act, they must first determine whether they are “entitled” to do so: whether a particular course of action conforms to what governments are supposed to do. The fact that their interpretation may be contestable does not detract from the importance of this policy filter. And when they decide to act, they must establish that they are doing so in the right way: whether the proposed policy conforms to contemporary understandings of the requirements of the constitution and the law and whether their implementation has followed the appropriate processes of consultation and legislation.

In short, policy making takes place in a framework of established conventions and normative rules. Governments may at times attempt to stretch those conventions and to sidestep those rules. But governments which are judged to act in an arbitrary fashion, or which threaten the private sphere of the citizen, are rightly seen as undermining the basis of their authority—whose maintenance depends on its exercise conforming to the established rules and conventions. The point is obvious enough. It is emphasized here only because it is so often forgotten—because taken as “read”—in the public policy literature.

There is a further point to note. The legitimacy of any political system depends on its ability to ensure the stability of the social order, as Hobbes (among many others) observed a long time ago. Not only must governments, if they are to justify their authority, be able to defend the state against external enemies. They must also be able to maintain social cohesion at least in the minimal sense of maintaining law and order and protecting the vulnerable. How best to maintain law and order is, of course, another matter, involving disputes about the criteria to be used in framing and judging policies (to which we return later). For example, does it simply require efficient policing and capacious prisons, or does it mean social engineering designed to deal with the sources of crime, disorder, or disaffection? Governments with different assumptive worlds will give different answers to such questions. But however interpreted, the maintenance of social cohesion is surely a fundamental concern of all governments which not only shapes individual policies but also the priorities within any list of candidate policies. And what is more, the apparent responsiveness to these concerns is electorally important in all liberal democracies. Governments face evaluation not only for what they in fact deliver, but whether they do so in ways various publics regard as legitimate.

The other obvious concern of governments once in office, is to keep themselves there: to secure their own re-election. From this perspective, the production of public policy can be seen as an exercise in maximizing their chances of winning office (Downs 1957). This raises both analytical and normative issues. Normatively, the notion that politicians design their policies (and more often still, the presentation of those policies) in order to win votes prompts criticism. It is often seen as an abuse of

politics: a misuse of political authority/power. It can suggest bad faith, manipulative cynicism, and the deceptive use of power (Goodin 1980). Far be it for us to suggest that politicians do not engage in manipulation: there is no shortage of examples of “spin,” of misrepresentation of the evidence, and of the selective use of data by governments. There are few better examples in recent history than the case made in 2003 by the United States and British governments for invading Iraq: Subsequently no evidence was found to justify the claim that Iraq had the capacity to use weapons of mass destruction (Butler 2004; Woodward 2004). It also provides a warning: whatever the motives that drove Bush and Blair, their policies were not simple exercises in vote maximization (and if so, they turned out to be a massive miscalculation). But, if we change the wording—if instead of talking about vote chasing, we substitute the assertion that in a democracy politicians should be sensitive and responsive to public concerns—we will get approving nods. Politicians are not necessarily or exclusively vote maximizers. They may, for example, be *maximizers of moral rectitude* (or history book reputation).

Moving one step further, let us take a slightly weaker but more realistic definition of the political imperative from which somewhat different normative conclusions follow. If we assume that one of the tests applied to the production of public policies by governments is their acceptability, then we may conclude that this is a perfectly legitimate concern. Not only are governments that produce policies unacceptable to the public less likely to be re-elected. They will also be condemned as foolish or authoritarian, on the grounds that unacceptable policies will also be either not implementable or in breach of the conventions that delineate the proper role of government (or both). The introduction in the 1980s of the poll tax by Mrs Thatcher’s government in Britain would be one example of producing an unacceptable policy that was roundly (and plausibly) condemned and subsequently abandoned;¹ the US example of the repeal of catastrophic coverage for Medicare in the late 1980s is more complicated. It was in fact a perfectly sensible policy that was widely misunderstood as unfair (Oberlander 2003).²

¹ After decades of discussion about reforming Britain’s system for funding local government—a mixture of property taxes and central government grants—the government of Mrs Thatcher decided to replace the former by a poll tax, as from 1988. The decision was widely criticized, led to sometimes violent demonstrations, and prompted widespread evasion. While 8 million people gained as a result of the switch from property taxes to the poll tax, 27 million lost. As one of Mrs Thatcher’s ministers subsequently commented: “It was fundamentally flawed and politically incredible. I guess it was the single most unpopular policy any government has introduced since the War” (quoted in the classic account of this episode: Butler, Adonis, and Travers 1994, 1). The poll tax fiasco greatly weakened Mrs Thatcher’s position and contributed to her subsequent downfall, and her successor’s government promptly dropped the poll tax.

² The legislation to add catastrophic health insurance and outpatient prescription drug coverage to Medicare in 1987–8 was and is regarded as a debacle. The legislation, repealed within a year, addressed two serious problems, but was financed exclusively by increased premiums on beneficiaries, which in turn was neither explained nor justified well by the Reagan administration and the reform’s defenders in Congress. In a memorable incident, the then chairman of the House Ways and Means Committee, Congressman Dan Rostenkowski, was pelted with tomatoes by older constituents in Chicago who were outraged by this unorthodox form of financing a social insurance program. The obvious truth was that while the program had merit, the financing means were genuinely a surprise, not well defended, and

There is a fine borderline between on the one hand, the investment of political capital and the use of rhetoric in persuading the public of the necessity and desirability of policies—in rallying support and making them acceptable, in other words—and on the other hand, manipulative cynicism in their presentation. We praise the former as political leadership—only consider Churchill’s use of rhetoric in rallying the British people in the dark days of 1940 or Roosevelt’s defense of the Lend-Lease policy—while condemning the latter. Modeling governments as prudential, self-regarding actors does not, therefore, capture the complexity of the real world of public policy. It leaves unexplained, for example, why governments take policy decisions that will only benefit their successors. It also creates a puzzle: why do governments address moral or ethical issues which at best are neutral in their impact on voting behavior or at worst may turn out to be stirring up an angry hornet’s nest of opposition?

The case of pension policy in the opening years of the twenty-first century illustrates the first point. Across most OECD countries governments were anxiously addressing the problem of aging populations and the expected (and often exaggerated) burden of meeting the consequent pensions’ bill. In doing so, they were looking twenty and more years ahead. Why did they do so when, on the face of it, they had little to gain by such a strategy? After all, no government in office in 2000 would have to answer to the electorate of 2030. One reason may of course be that they were using the future as a pretext for pursuing present reform proposals (such as further pension privatization) which otherwise might be regarded as unacceptable.³ Ideology is there for sure but so is serving their friends in the finance community. This is a fully defensible interpretation of the Bush administration’s embrace of social security pension reform as required by the feared insolvency that population aging foreshadows. The argumentative structure and rhetoric is familiar: actuarial forecasts project increasing pension claims and assuming no change in benefits or contributions, “bankruptcy” at some future date is a mathematical certainty. The fact that “trust fund” language originally was meant to communicate political commitment is lost. Instead, the analogy to private trust funds which can go broke, becomes a contemporary source of public fearfulness (Marmor 2004).

However, even conceding this explanation, invoking the interests of yet to be born voters can be seen (like hypocrisy) as the tribute paid by vice to virtue. Governments rightly presume that they are expected to take a long-term view and the fact that policy makers feel obliged to invoke this justification for their policies illustrates the extent to which public policy is shaped by such normative considerations. Which is not to argue, of course, that governments invariably (or even usually) examine the long-term implications of their policies: witness, for example, the problem of nuclear

especially vulnerable to the claim that they had not been legitimized by broad public discussion and understanding.

³ There is no question that President Bush was hesitant about direct criticism of the US social insurance pension programs. The use of spectres of an aging America was a vehicle for prompting present adjustments in the name of necessity. The change he proposed—using social insurance contributions for investments in individual risk bearing accounts—was deeply controversial within the policy analytic community, but amplified rather than ridiculed by the media.