

# The short-term political futures of PM Liz Truss



*Liz Truss is the fourth Conservative PM in twelve years, and there are many indications that she could yet be the shortest in office. With a daunting agenda of urgent and fundamental policy issues she has apparently chosen an inflexible, ideological path. But with only a couple of years to recoup the Conservatives' polls deficit before a general election, [Patrick Dunleavy](#) argues that her political future is dominated by risks and hard choices.*

As normal politics resumes, the new Prime Minister Liz Truss has been pitched head-first into a sea of acute problems, an omni-shambles made considerably worse by the conspicuous inactivity of her predecessor throughout the protracted Tory leadership race. Truss has none of his charismatic qualities, but is a shrewd tactician. Starting with the first preference support of just 14% of Conservative MPs, she managed to meld a narrowly winning anti-Sunak coalition of MPs, by bringing to her cause the hard-line anti-Brexiteers in the European Research Group (still searching for its elusive and chimerical 'benefits') and Johnson loyalists angry at the (in their-view) unjustified 'betrayal' of the former Chancellor.

Defying the conventional logic that a PM should 'reach out' to all factions within their party, Truss has followed Johnson's lead in appointing a rigorously sectarian cabinet of the Tory right, while also extending payoffs to her supporters alone in the junior ministerial changes made so far. Just about the only shrewd move in her cabinet picks has been the systematic insertion of people almost-unknown to the public in the three places from where a within-cabinet challenge has previously succeeded (both in the UK and other Westminster systems, like Australia).

Kwasi-Kwateng as Chancellor has a small public persona (but a private sector past that includes some clouded episodes), but James Cleverly as Foreign Secretary and Thérèse Coffey as Deputy PM will evoke only a 'Who are they?' reaction from most voters. The price of such Machiavellian appointments may be counted in the wisdom of their inexperienced policy choices. Meanwhile Rishi Sunak is the prince in exile on the backbenches, and his third of the party's MPs are watching for their moment to reassert influence.

A large part of Truss's logic in making sectarian choices has been that she must seem to fulfil (some of) her vaunting promises made in the leadership race, such as 'No new taxes', and this requires radicalism – a short-term rush to implement seeping policy changes. Yet the attempted 'dash for delivery' is hampered by two key sets of problems.

First, the Conservatives have been in power for more than 12 years already, and they have had plenty of time to implement right-wing solutions. In Truss's own campaign speeches she implicitly admitted that few of these ideas had worked, yet her prescription is essentially more of the same, albeit perhaps grouped into a slightly longer-run strategy. But a few wacky new ideas – using public debt instead of taxes to cover the crisis deficits ahead, re-committing to 'brown' policies like fracking and cutting green levies, and proclaiming an open season for unrestricted bankers bonuses and profit accumulation/regulatory easing in 'investment zones' and freeports – will be very unlikely to make any perceptible positive economic difference in the short-term.

Unless the aging in office process is counteracted by exogenous new developments (like a new PM or conspicuous economic success), incumbent UK governments accumulate blame for the status quo that costs them at least 0.1% of their popularity every month. This is an ineluctable process, even if it may at first sound manageable and 'glacially slow'. Yet it adds up to 1.2% a year or 6% over a full five-year term. So, even if Truss gets a short-lived bounce in opinion polls – of which there is no sign yet amid the omni-crisis – public dissatisfaction with things going wrong will be increasingly targeted on the Conservatives.

Second, Truss (like Johnson before her) only has the short-term in which to reverse the Conservatives' electoral and polling malaise. But where Johnson promised to break a parliamentary deadlock, and 'get Brexit done', Truss confronts an immediate winter energy crisis, an energy-plus-chronic inflation crisis that is bedding in, increasing industrial unrest at unprecedented real wage cuts, multiple acute pressures on public spending, a worsening external trade and balance of payments situation, and the threatening international landscape that demands new defence spending increases.

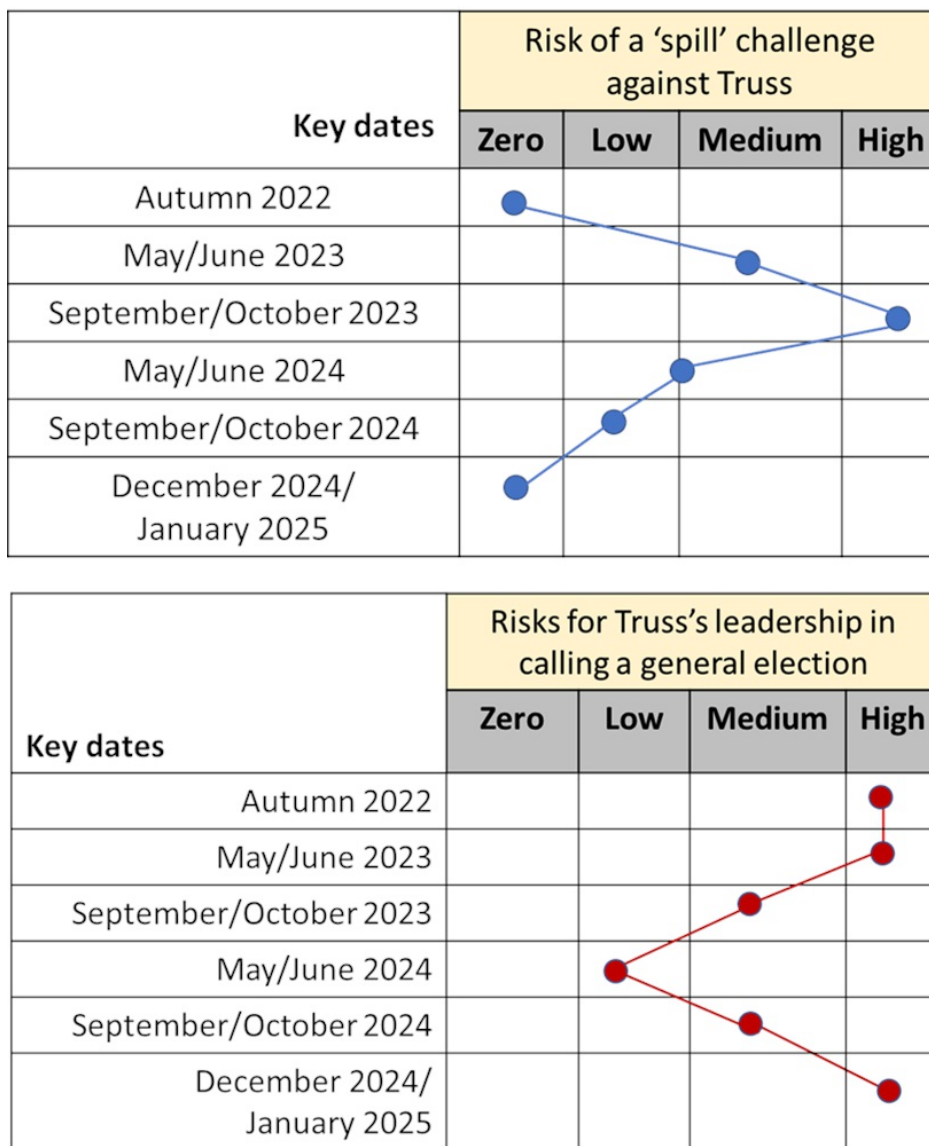
## Truss's six choice/risk windows

All these problems must be tackled within the 27 months before a general election becomes unavoidable. Within this period there are six acute choice points, with the risk profiles, shown in Figure 1:

1. Right now

Right now, perhaps a narrow window might exist for Truss to call an immediate general election, as conventional wisdom argues that Gordon Brown should have done when he replaced Tony Blair in 2007. Yet, Theresa May’s later 2017 experience of calling an early election and losing a 20 percentage point poll lead in six weeks, partly because of her ‘robotic’ persona on the stump, strongly militates against such a move. The clincher is that the Conservatives have not been ahead but well behind in most polls for many months, and it is hard to see this changing for the better as Truss’s ‘loans for energy discounts’ policy imposes still-severe price rises on all UK consumers and businesses this winter.

Figure 1: The key risks that Liz Truss confronts at six key times before the next general election



2. May-June 2023

May-June 2023 is the next acute risk point, primarily because a new institution of the *leadership spill vote* is now firmly established in UK politics. A 'spill' occurs when MPs can call a no confidence vote in the current party leader, without there being any declared alternative leadership candidates as yet publicly declared. So the incumbent is not evaluated against any clear alternative, but only a vague idea of what might be.

Cameron's forced departure after the Brexit referendum loss was the first disguised 'spill', and the apparent chaos of its aftermath led Tory elites to backtrack on holding a membership election and instead concert May's crowning in a rush. The prolonged spill campaign to force May out from 2018-19, led by Johnson and the ERG right-winders, culminated in her resignation after successive parliamentary defeats. This second disguised 'spill' was at least followed by the Johnson vs Hunt party membership vote. Finally, the most explicit spill vote was that against Johnson in 2022, long heralded and eventually re-orchestrated from within cabinet by Sunak and Sajid Javid, breaking new ground in the explicitness of intra-party conflicts.

The risks of a spill against Truss are shown in the top part of Figure 1. Already in the first days of Truss's premiership, pro-Sunak sources have leaked repeated stories to the Tory press that Truss will face a leadership spill vote if the May 2023 elections go badly and Tory polling fortunes have not improved. The rationale for such a swift challenge is that the shrinking time before a general election must be held requires a crisis response if Truss is seen as failing. If Starmer and Labour remain ahead or competitive in the polls, her critics argue that this window is the last opportunity for another Tory leader (especially one like Sunak with evident electoral skills and appeal) to change course to moderate policies, stem the rot and give the party a new fighting chance.

On the other hand, the bottom part of Figure 1 shows that if things have picked up for Truss and the Tories by May/June 2023, the PM could also have a chance of calling an early general election at a time of her own choosing. A decision could be made in the old way, closely reading the runes of the local elections (a chance that May threw away in the 2017 rush to the polls). With a likely improvement in inflation rates already factored in (as peak energy and food price increases begin to drop out of the economic indicators), plus summer weather and holiday prospects cheering voters up, it would still be a huge risk for Truss to go so early. And the timing is just too early for any Truss-era economic policies (beyond winter crisis mitigation) to begin to be visible to voters. In all likelihood, the Tories' poll position will still make it impossible for her to put her tenure in jeopardy so soon, aligning with any new PM's natural urge to hang on in 10 Downing Street.

### 3. September/October 2023

This would be the second and last window for Truss to pick her own election date, rather than being forced to the polls in May/June 2024 without any viable option, and regardless of how the economy and government popularity were doing then. An interesting insight into Truss and Kwateng's thinking will be the mini-budget (expected on Friday 23 September 2022). Behind the surface rhetoric of longer-term economic strategies, if a whole raft of short-term tax cuts are scheduled in for spring/summer 2023, this will signal a possible early push. Yet again the risks would be great, since not much may have changed from June, and autumn elections risk voters becoming grumpy and doomy as another difficult winter approaches. Johnson could defy these factors in December 2019 with his Brexit-myth override and the evident parliamentary stalemate as his rationales, but Truss has no such options.

If Truss gets average-to-poor May 2023 local elections and polling deficits continue over the summer, there might still be a risk of an autumn 2023 spill. Because Sunak is a known quantity for UK voters, his supporters could argue that his late substitution in Number 10 could improve the party's chances. Such a move would have to happen via a spill that led on to most Conservative MPs agreeing to Sunak as leader by consensus (with no party member inputs feasible at this late stage). In this just-possible but highly problematic scenario, Sunak could perhaps recreate party unity and make a handbrake turn towards more moderate policies. But he would not be able to change much in policy outcome terms by May/June 2024, and might need to delay going to the polls to the 'last ditch', end-of-year slot (see 6 below).

### 4. May/June 2024

This is the window that most analysts expect the next general election to happen, and it is the lowest but still appreciable risk for Truss. On the one hand she can read the local election entrails and present the election as normally timed. And by now the government can potentially gain any actual benefits accruing from voters' recognising signs that Truss's 'renew growth/no new taxes/yet still deliver' strategy has begun to work.

In a more stabilised economic environment, and with Con-Lab poll ratings closer together, the Conservatives might also dust off the tired old 'coalition of chaos' argument to frighten voters that Labour would depend on SNP votes to govern, and thus risk breaking up the union. Yet English voters might not be too unhappy about this. And the Scottish appetite for speedy independence is uncertain in the face of two conflicting trends – Putin's evident aggression (strengthening arguments to stay part of a bigger defence capability) and of North Sea oil and gas increasing in viability again (which may help an economically independent Scotland). It seems unlikely that another independence referendum would be an active short-term (as opposed to rhetorical) SNP demand in 2023-4, not least because (after Ukraine and possible future conflicts) such a vote could easily be lost.

By May/June 2024, on all the normal expectations, Truss should face only a low risk of another spill challenge, as the election concentrates minds and suppresses overt dissent. Yet if things look very adverse because of Truss's hard-line policy choices (e.g. boosting Liberal Democrat votes in fracking areas), or if the government sleaze problems that plagued Johnson have re-surfaced (as some indications suggest is likely), a medium risk of a last-ditch spill challenge might remain.

#### 5. September/October 2024

Autumn 2024 would be Truss's last chance to control the micro-timing of her election. In theory the 2019 parliament can last without another election until January 2025, but only very problematic economic and political situations (like disastrous local elections, closely matched or adverse Con-Lab poll ratings, and risks of economic turbulence) could delay the timing beyond the early autumn. Buying more time might not work anyway because intense speculation about a May/June election is bound to occur in spring 2024. Unless the PM pre-announced the autumn timing earlier in the year, binding her own hands on the dissolution lever, then conspicuously being forced to postpone for another six months would just signal a government on the ropes and afraid to face voters.

#### 6. December 2024 to early January 2022

This timing is notionally feasible but very unlikely indeed. Winter weather plus likely still continuing energy costs concerns would create a bleak and depressing backdrop for voters, potentially creating conditions for a Labour landslide that still seems unlikely at earlier dates. Only the most stark risks of defeat, or appalling misjudgements by Truss at previous windows, could force her government to hang on this long – although her replacement by Sunak late on might force him to delay.

### Post-election scenarios

If Truss wins a narrow majority, but without a clear electoral endorsement and with a worsened parliamentary situation, she could none the less clearly stay on as PM. Her supporters in the Commons could argue that after 18-24 months her policies had not yet had time to work through. So she would likely be protected from any intra-party spill challenges for at least one or two years. Beyond that all bets are off.

If Conservative MPs still outnumber Labour in a hung Parliament, could Truss stay on at Number 10? It is hard to see how. Given the course the current government is clearly set on, its only conceivable partners are the Democratic Unionists.

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### About the Author



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