

# **Post-Truth Politics, Bullshit and Bad Ideas:**

## **‘Deficit Fetishism’ in the UK**

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### **Introduction**

It has become fashionable to talk of the advanced democracies having entered a phase of ‘post-truth politics’ (Lockie 2017, Rose 2017, Suiter 2016). The rise of populist and anti-elite movements, and the rejection of basic principles of reason and veracity characteristic of much of their political discourse, has sparked a good deal of media interest, although so far little in the way of systematic

scholarly attention. The concept of ‘post-truth’ can be traced back to Ralph Keyes’ broader social critique of dishonesty and deception (2004), but more recently the idea has begun to be applied to politics, albeit mainly outside the academic sphere. Post-truth politics is defined variously as a focus on ‘politics’ rather than concrete ‘policy’ (Roberts 2010), a mistrust of authoritative ‘experts’ (Drezner 2016) and even a brazen willingness to lie and the straightforward refusal to accept clearly documented facts (*The Economist* 2016). The election of Donald Trump to the American Presidency and the successful campaign to leave the EU in the United Kingdom are perhaps the two most widely discussed examples of the genre.

It is tempting to classify these instances of post-truth politics under the familiar rubric of populism. And indeed, there are many good reasons for analysing the likes of Trump, former UKIP leader Nigel Farage and others in this way (Mudde 2004). Their rhetorical utterances can be understood as typical of a particular mode of reasoning (Laclau 2005) or indeed as a form of politics in itself that more or less manifests itself *in toto* as a distinctive mode of communication (Jagers and Walgrave 2007). However, our suggestion here is that the apparent loosening of the relationship between political rhetoric and ‘truth’ (or put another way, the diminishing importance of anchoring political utterances in relation to verifiable facts) is a much broader phenomenon that is not confined to the spaces inhabited by populist politicians. Nor is it a matter of mainstream political discourse taking on a more populist form or simply adopting the standard tropes of populism. In this paper we treat these forms of political utterance as consequential, and use, by way of illustration, key debates in contemporary macroeconomic policy around

public debt and budget deficits. So-called 'austerity' policies have been widely adopted in the face of much academic opposition, and have survived despite this opposition being borne out by the expected poor results (Blyth 2013). Following Harry Frankfurt (2005), we suggest that the rise and resilience of failed ideas in the political sphere is usefully understood through their operation as 'bullshit'. We go further to suggest (a) that the simultaneous rise of bullshit in political discourse and the rise of austerity as the dominant feature of macroeconomic policy is not coincidental and (b) that the rise of bullshit (and thus of austerity policies) is rooted in the broader hollowing out of western democratic politics.

Frankfurt began his essay *On Bullshit* with the words 'one of the most salient features of our culture is that there is so much bullshit. Everyone knows this. Each of us contributes his share' (2005: 1). It is our contention that this broad statement is of ever growing importance to the political sphere too. In advanced democracies, political discourse is increasingly dominated by what Frankfurt defines as 'bullshit': deceptive misrepresentation, short of lying, which is indifferent to facts. Politicians' defence of spending cuts as a way out of the economic downturn, a notion rejected by almost the entire economics profession, revolves around homely notions of 'tightening belts' and 'putting our house in order'. It is frequently accompanied by claims that 'there is no magic money tree', despite the widespread use of central bank money creation since the financial crisis.

Why the escalation of bullshit in our political life? This paper argues that the growth of bullshit is a real phenomenon that is best understood as a consequence of the sidelining of conventional political ideologies, and of the organizations that have traditionally articulated and promoted them: formally organized political parties. This decline is in turn a feature of the entrenching of neoliberalism in the advanced democracies, which has tended to individualize political action, placing a heavy cognitive burden on citizens trying to make sense of the political world, whilst severely constraining the range of political actions that democratic institutions are permitted to pursue. In the 'void' (Mair 2013) left by ideologically coherent political parties, a set of new opportunistic political actors have emerged, performing the classic function of legitimating democratic government and communicating with citizens, but without the parties' intellectual and political substance. The result is a political discourse suffused with bullshit.

The paper proceeds as follows. First we outline Frankfurt's conceptualization of bullshit and apply it to the political sphere. We then connect this concept of bullshit to the decline of mass parties and the emergence of a new, depoliticized form of democratic governance. We illustrate these trends through a short case study of the debate about fiscal policy in the UK, described memorably by Stiglitz (2010) as 'deficit fetishism'. The final section concludes.

### **The Concept of Political Bullshit**

As a theoretical starting point, we assume that what is said in the sphere of politics is consequential for political outcomes. Rhetorical utterances matter because they have the capacity to shape actors' problem and solution sets and, more broadly,

they have the capacity to construct the world in particular ways, which in turn define the parameters of what is both politically possible and normatively appropriate (Hay 2004). A now huge corpus of ideational scholarship explores the many and varied ways in which ideas - propositions about the social world – intended to guide human behaviour – ‘matter’ in the political sphere (see Abel, Blyth and Parsons 2010, Béland and Cox 2010). Politics may be seen less as a domain of competing fixed interests and more as a space in which ideas vie with one another to actively constitute those interests (Blyth 2003). Ideas may form the backdrop to political debates, creating broad intersubjective premises that define the scope of what is deemed to be technically possible or (for example) socially just. Ideas may have particular salience in moments of uncertainty and crisis where there is a heightened demand for new problem and solution sets. Communicative discourse and political rhetoric are not merely epiphenomena, but potentially active shapers of social reality.

One of the most interesting puzzles to emerge of late is the question of how ‘bad ideas’ (or with Quiggin [2010] and Krugman [2012], ‘zombie ideas’) emerge and survive within the policy process, and it is here that the concept of bullshit has particular utility. Bad ideas may be defined as claims about the world that are easily refuted or contested by appealing to an archive of authoritative knowledge (Schrad 2010). Salient examples include young earth creationism and climate change denial. What makes these particular bad ideas worthy of study is their strong traction in policy discourse despite their manifest lack of scientific veracity (Matthijs and Blyth 2017). Additionally, both creationism and climate change denial are rather more than residual artefacts of ignorance or (at best) pseudo-

science (Gordin 2012). Rather, they have been active shapers of public policy debate, most obviously – though not exclusively – in the United States. That such ideas are kept in circulation through (for example) well orchestrated lobbying (Jaques et al 2008) or via the exploitation of media balancing norms (M. Berry 2016, Mooney 2004) is well established. What is also striking – again a solid research finding – is the extent to which citizens in democratic societies are themselves active carriers of misinformation (Kuklinski *et al* 2000). For example, there are well-established discrepancies between public perceptions of immigration levels in the UK and the statistical realities (Duffy and Frere-Smith 2014). The same is true of exaggerated public perceptions about levels of benefit fraud (Mulheirn 2013) or the claim often made by UK politicians (on both sides of the political spectrum) that there are some communities in Britain where three or four generations have never had a job (MacDonald, Shildrick and Furlong 2014).

Claims such as these – that Britain is overwhelmed by immigrants, who in turn become a major fiscal drain on the Exchequer, which, in any case, is suffering from levels of domestic benefit fraud (that eclipse revenues lost through forms tax evasion/avoidance) rooted in a culture of worklessness and sloth amongst the poorest members of UK society – can all be refuted with an appeal to various sources of hard data. The puzzle becomes, simply, why do such claims continue to have currency despite being falsehoods. Frankfurt's answer is that the truth in relation to such utterances is irrelevant. This is because these claims are not lies; rather they are bullshit.

Thus Frankfurt makes a key distinction between lying and bullshitting. A lie is a form of utterance that pays heed to the truth. To speak a lie is to *knowingly* pronounce a falsehood. To bullshit, on the other hand, is to practice a type of speech act that is not triangulated in relation to the truth and which proceeds without effective concern for the veracity of the claim in question. As Frankfurt puts it:

Telling a lie is an act with a sharp focus. It is designed to insert a particular falsehood at a specific point in a set or system of beliefs, in order to avoid the consequences of having that point occupied by the truth. This requires a degree of craftsmanship, in which the teller of the lie submits to objective constraints imposed by what he takes to be the truth. The liar is inescapably concerned with truth-values. (Frankfurt 2005: 51)

A lie is a constrained form of speech act, whereas the bullshitter is afforded considerably more freedom to make claims in relation to the real world. In its purest form, it is not possible to submit bullshit to adjudication in a court of truth where the claim is straightforwardly tested against the facts. Ideal-typical bullshit is immune to any attempt to scrutinize a claim against the empirical record. Confronting the bullshitter with 'the facts' is unlikely to be a successful argumentative strategy. This, in a nutshell, is what makes bullshit so much more dangerous and socially corrosive than lying.

Of course, much relies on the relationship between the supply of and the demand for bullshit. If Donald Trump is treated as the archetypical bullshitter (Heer 2015), then we also need to know something about his audience and the mechanisms by which unverifiable nonsense becomes the basis of a distinctive politics. Extant research on the question of receptivity to bullshit tends to place a high premium on the ways in which the internet has been fundamental to not only democratizing the distribution of information and knowledge, but also increasing 'our access to unreliable information' (Barr 2015). Research also suggests that the appeal of vacuous statements tends to correlate with lower levels of education, belief in the paranormal, acceptance of alternative medicine and so on (Pennycook et al 2015).

Frankfurt himself speculates on why bullshit has become more prevalent of late. He suggests, first, that bullshitting is common in public situations where the speaker is required to pronounce on matters where they do not have expertise (2005: 63). The transformation of expertise and its key avatar 'the expert' is another topic, but there are some obvious links with Tetlock's well-known discovery that 'experts' are spectacularly bad at making reliable predictions in precisely those fields in which they claim professional expertise (Tetlock 2005). Moreover, Frankfurt associates the probable rise of bullshit with 'the widespread conviction that it is the responsibility of a citizen in a democracy to have opinions about everything, or at least everything that pertains to the conduct of his [sic] country's affairs' (2005: 64-65). He also spends the final few pages of his essay implying (though not arguing through) that the rise of relativist (or 'antirealist') conceptions of truth has been an important determinant of the rise of bullshit in public and private discourse (2005: 64-67).

At this point it is worth dwelling briefly on the relationship between 'truth' and post-truth politics (where bullshit flourishes). It should be clear from the foregoing that we are interested in how certain forms of rhetoric give rise to particular political outcomes. In the political sphere, truth is typically contested, constructed and subject to framing strategies (Enfield 2017). As Enfield (2017) goes on to argue, politics is never a matter of establishing the precise veracity of a claim or of using the polity as an area for settling truth in a rational-scientific sense. The objective truth of a statement is less important than the consequences of widespread acceptance of the statement. In Arendt's ideal typical space of politics - a space of 'factual truth' - political judgment emerges from the interplay of alternative perspectives (Arendt 1967). At the same time this civic discourse operates within the extra-political (scientific) context of 'rational truth'. Thus we should expect - as a feature of normal politics - an issue like climate change to be treated very differently in the respective domains of 'factual' and 'rational' truth. This means that bullshit claims and bullshitting political actors could be present in any democratic political formation. As such, we are not arguing that politics before the recent period was not vulnerable to bullshit, but we do want to explore the idea that bullshit as a mode of political expression has become a defining characteristic of recent politics in advanced democracies. This emergence of bullshit is perhaps explained by two phenomena: the erosion of the contextual linkage between factual and rational truth (Weyn 2017), and the weakening of the institutional pre-requisites of Arendtian political practice.

Our argument, developed in the next section, is to suggest that the explanation for the proliferation of bullshit may indeed reside in key transformations in the character of democratic politics. However, we take a rather different line to Frankfurt (or indeed to some of the psychological research on bullshit) by associating the proliferation of bullshit with the hollowing out of democratic *party* politics in advanced capitalist democracies, thereby downgrading explanations that place the burden upon technological change pure and simple. We agree with Frankfurt that the rise of bullshit is associated with certain epistemic shifts, but rather than focus on the postmodern turn (as he seems inclined to do), we focus instead on the particular role played by neoliberal rationalities in normalizing bullshit as a mode of expression within political discourse.

### **The Decline of Parties and the Rise of Bullshit**

There are abundant examples of political bullshit, but our interest in the concept was sparked by the remarkable and counter-intuitive success of the idea of ‘austerity’ in the aftermath of the financial crisis (Blyth 2013; C. Berry 2016). Despite an overwhelming consensus amongst professional economists that fiscal retrenchment in the context of monetary policy at the zero lower bound will inevitably prolong an economic downturn, political appeals to ‘tighten belts’ and cut back on wasteful spending have met with widespread popular approval. Not only has public opinion been inconsistent with the state of knowledge in economics, which is in itself unremarkable, but it has not evolved as expected in response to the very slow, and in some cases non-existent, recovery from the financial crisis. Despite half a decade of austere policies leading to stagnation and at best pallid growth, appeals to belt-tightening remain electorally powerful.

Even where governments have been punished for presiding over economic slumps, public opinion has remained broadly supportive of the broad idea of austerity (Pew 2013: Ch.1, Q33).

The success of austerity discourse challenges conventional understandings of how democratic politics interacts with economic policy. Conventional political economy reasoning tells us that voters will reward governments that deliver growth, and that politicians will avoid tax rises and spending cuts because of the electoral costs associated with them. In line with this thinking, over the past quarter century or so economic policy-making in advanced democracies has become increasingly technocratic and insulated from political pressure. Independent (and in the Eurozone countries, supranational) central banks and constitutionalized fiscal constraints ensure that impartial experts can make the right decisions about policy without being influenced by popular demands for unsustainable growth. The assumption underlying these institutions is that voters instinctively reject austerity, preferring instead credit- and deficit-fuelled growth in the short-run, whatever the long-term consequences.

Post-crisis politics in the advanced democracies turns this logic on its head. Faced with the risk of deflation, the cold rationality of the experts and technocrats has produced a range of unconventional and even unprecedented monetary measures, such as quantitative easing and negative interest rates, and some are even hypothesizing such unorthodox ideas as helicopter drops in an attempt to shake the economy into life. In contrast the gut instincts of the public at large appear to be markedly pro-cyclical, responding to scarcity with abnegation.

Attempts to counter the austerity narrative have fallen flat, most notably when, in a pre-election edition leaders special edition of the BBC show 'Question Time', former UK Labour leader Ed Miliband denied that the financial crisis had been caused by excessive government spending, to the audible incredulity of the studio audience.<sup>1</sup>

This state of affairs reminds us that material interests and rational policy choices often have little place in political debate. As Blyth (2003) puts it, 'structures do not come with an instruction sheet'. The damaging effects of austerity on the economy seem not to dent its political appeal, so we need to examine why citizens and politicians articulate and receive economic ideas in the way they do. One of the key features of Economics is that it produces a form of knowledge which is generally speaking hard for individuals who lack specific specialized training to access. Not only is understanding Economics technically demanding, developing a knowledge of Economics also has uncertain and likely limited payoffs. In other words, voters are advisedly 'cognitive misers' when it comes to gathering information about key economic policy decisions. Instead, they are more likely to take their cue from the pronouncements of authoritative opinion leaders whom they identify as having their interests at heart, or who simply sound plausible.

Traditionally in democracies political parties have played this role for many citizens. In V.O. Key's classic definition, parties 'perform the function of the articulation of the interests and aspirations of a substantial segment of the citizenry' (1964: 9). Rather than having to make laborious calculations of the benefits to them of different policy measures themselves, voters were able to

allow parties and their candidates to define these benefits for them. Parties had an interest in articulating stable and coherent sets of policies in order to build a reliable social constituency that would give them both a reservoir of votes and a supply of volunteer activists to maintain their organizations and stand for political office under the party banner (Duverger 1954). In the 'golden age' of parties many voters identified strongly with a particular party and trusted that party to represent the interests of people like them. The classic 'mass party' had not only a robust organizational apparatus to root it deep in the fabric of society, but also a set of ideological beliefs that could serve as a heuristic for voters in evaluating the likely consequence of different policy choices (von Beyme 1985).

The decline of the mass party and the increasing individualization of voter behaviour has undermined parties' ability to fulfil this role in the political system. Voters are less likely to identify with any party, join a party as a member, reliably support the same party, or indeed even vote at all (Mair 2013, ch.1). Parties' ability to define voters' interests for them has declined as voters are less likely to trust parties and politicians generally. The dominant models of voting behaviour in the scholarly literature see voters as 'consumers' of politics, choosing between a menu of options on the basis of perceptions of governing competence ('valence') (Whiteley et al 2013). The literature on 'cognitive mobilization' (Inglehart 1970, Albright 2009) associates these changes with the emergence of a more educated population, unwilling to defer to the authority of elites and keen to express their own opinions on political affairs.

Yet even in the context of mass literacy and compulsory education through to adulthood, most voters remain relatively unqualified to make such judgements. Survey data routinely shows that the average citizen has inconsistent and ill-informed views about politics, and voting decisions can be swayed by random and irrelevant events (Achen and Bartels 2016). Even where citizens avoid flatly false beliefs, they have difficulty thinking about public policy problems in an appropriate way. Converse (1964) argued that whilst well informed elites and activists are able to conceptualize policy issues and assess alternatives, less informed citizens have a limited ability to deal with the abstract concepts and empirical generalizations required in such discussions. Instead, poorly educated citizens have 'limited horizons', 'foreshortened time perspectives', and rely on 'concrete thinking' (Converse 1964: 11). Whilst elites can have relatively sophisticated belief systems based on abstract concepts, amongst less informed citizens 'objects shift from the remote, generic, and abstract to the increasingly simple, concrete, or "close to home"' (1964: 10). Whilst Converse researched the political beliefs of a less educated population half a century ago, it remains the case that very often voters subscribe to views that are demonstrably false, and fail to change their minds when exposed to contrary evidence (e.g. Bartels 2008). As Caplan puts it, 'voter irrationality is the key to a realistic picture of democracy' (2007: 3). More educated voters are not immune from irrational attachment to demonstrably false beliefs (Hamilton 2011, Kahan and Corbin 2016). The framing (Chong and Druckman 2007) of political issues by elites therefore becomes crucial.

The decline of trust in political parties and other collective institutions therefore places a great intellectual burden on citizens, a burden that they can not be expected to carry, not only because of the high costs of gathering and processing complex information about politics and policy, but also because in the context of mass politics they have no individual incentive to do so. ‘Bullshit is unavoidable whenever circumstances require someone to talk without knowing what he is talking about’, Frankfurt notes (2005: 63). ‘Thus the production of bullshit is stimulated whenever a person’s obligations or opportunities to speak about some topic exceed his knowledge of the facts that are relevant to that topic’ (Frankfurt 2005: 63). Voters are placed precisely in this situation: they are called upon to make judgments about complex matters they understand poorly, under unreasonable time constraints, with no discernable consequences for error (at the individual level). Not surprisingly, voters’ political views are likely to be suffused with bullshit.

In the case of austerity, ill-informed voters struggling with the complexity and abstraction of macroeconomics – difficulties trained economists themselves often fail to grasp – are likely to shun abstract concepts such as aggregate demand and liquidity preference for the ‘concrete thinking’ of the household budget. In the household, a decline in economic activity is best dealt with by austerity, since deficits will not have any stimulus effect on revenue. An inability to conceptualize and observe the economy as a whole will lead to the erroneous conclusion that economy-wide spending cuts are necessary in a downturn. Indeed the reasoning may not even be so explicitly causal. A recent YouGov survey found that more UK voters felt spending cuts were necessary than felt they were good for the economy

(Dahlgreen 2015), suggesting an instinctive or moralistic reaction rather than a considered, if misguided, causal narrative. As Berelson et al argued

For many voters political preferences may better be considered analogous to cultural tastes ... Both seem to be matters of sentiment and disposition rather than 'reasoned preferences'. While both are responsive to changed conditions and unusual stimuli, they are relatively invulnerable to direct argumentation and vulnerable to indirect social influences. Both are characterized more by faith than by conviction and by wishful expectation rather than careful prediction of consequences. (Berelson et al 1954: 310-311).

Representative structures such as political parties and trade unions have traditionally provided a solution to this problem. By establishing relations of trust with their social constituencies, these organizations could use their intellectual and material resources to develop policy proposals in broader collective interests. Their ability to survive in the long run depended upon their success in delivering beneficial policies and convincing their voters/members of that success. In the absence of such trust-bearing institutions, citizens are burdened with the responsibility of deciding for themselves which policies will benefit them. Lacking the necessary resources, they will tend to believe 'common sense' stories rather than specialized knowledge, creating an intellectual 'market for lemons' (Akerlof 1970). Bad ideas may drive out good ones, since intellectual and informational asymmetries make it less likely that costly investments in developing good ideas will pay off politically.

## **Austerity Politics in Britain: non-partisan politics in defiance of macroeconomic common sense?**

The decline of political ideologies and the organizational infrastructure that supported them has, we argue, given way to a discursive free-for-all in which intellectual coherence and empirical falsifiability are increasingly absent. In this section we examine the characteristics of political bullshit with a view to laying some foundations for studying it systematically. To do this, we focus on the role played by bullshit in the domain of macroeconomic policy, specifically around questions of government debt and budget deficits. We focus on the recent debate on deficit reduction in the UK to illustrate the dynamics of political bullshit at work. Although the more spectacular cases of Donald Trump or the Brexiteers have captured the attention of observers of post-truth politics, we can see clear evidence of the same indifference to truth in the mainstream political consensus around deficit reduction after the financial crisis of the late 2000s.

For the purposes of this section, we focus on inter-party politics in the run up to and in the immediate aftermath of the 2015 General Election. The election was notable for returning a single party Conservative majority government to office for the first time since 1992. The most credible electoral analyses point to one key variable found in opinion poll data as the key explanation for the election result: the consistent perception that the Conservative Party scored significantly higher on economic competence than the rival Labour Party (Reeves, McKee and Stuckler

2016). The Conservatives were able to maintain an advantage on this metric throughout the election campaign in spite of inchoate rhetoric about a 'long term economic plan' and the apparently reckless presentation of uncostered (and seemingly *ad hoc*) proposals on (for example) NHS funding. This reputation for economic competence had been forged and retained, despite the previous Conservative-Liberal Democrat coalition's failure to meet its own budgetary targets, a record of falling real wages, a proportionate increase in so-called 'zero-hour contract' employment, a failure to deal with the UK's poor productivity performance and a generalized programme of austerity with well-publicised social costs (Hopkin 2017).<sup>2</sup>

Despite these *prima facie* favourable conditions, during the election campaign the Labour Party found it impossible to shake off one particularly damaging claim: that the fiscal profligacy of the previous Labour Government (which left office in 2010) had (a) left the incoming Con-Lib Dem coalition with a ruinous gap between public expenditure and government revenues and (b) left the UK economy especially exposed to the effects of the global financial crisis. In short, the macroeconomic imprudence of those Labour governments had caused *both* the deficit *and* the crisis. The notion of 'Labour's recession' became a staple rhetorical marker during the election campaign. The narrative of Labour profligacy is easy enough to refute (for example, Skidelsky 2015, Wren-Lewis 2015a), yet in the immediate aftermath of electoral defeat many in the party seemed to concede that Labour *did* overspend and that under Ed Miliband's leadership it became unnecessarily unfriendly to business. It follows, using this line of reasoning, that acceptance of the mantras of 'deficit fetishism' (Stiglitz 2010), and thus austerity,

would be central and necessary components of any economic strategy that it presents to the electorate in 2020. Put another way, the argument amounted to the claim that the only way for Labour to close the economic policy credibility gap with the Conservatives was to position itself as a party of fiscal rectitude, where fiscal rectitude is defined more or less exclusively in terms of spending cuts in the pursuit of budget surpluses and drastic reductions in the UK's debt to GDP ratio.

The centrality of deficit fetishism to recent UK macroeconomic policy debate had the effect of elevating the government budget balance to the status of key metric for the assessment of aggregate economic welfare, government competence and government credibility. This is a relatively recent occurrence, and there is an interesting story to be told about how and why other indicators, such as the current account balance, have become much less salient as indicators of economic health (Clift and Tomlinson 2008). Indeed, as Tony Dolphin (2014) suggested on noting that the UK had recorded three straight decades of current account deficits: 'This is a sign that there is a fundamental flaw in the UK's economic model.' This may be true, but balance of payments data is no longer, it seems, electorally consequential. The phrase 'electorally consequential', as used here, does not assume that incumbent governments will lose votes for poor performance on key economic metrics. Rather it means that the metric in question, the debate surrounding it and the repertoire of analogies that are used to illustrate its salience become key shapers of electoral politics and the parameters of what is deemed possible in policy terms.

The extent of deficit fetishism is perhaps best grasped by revisiting the Labour Party's 2015 Election Manifesto (Labour Party 2015). The very first page of the manifesto promised a 'Budget Responsibility Lock' – an assurance that all manifesto pledges were fully costed and that an incoming Labour government would legislate to ensure that all future party manifesto commitments would be audited by the Office for Budget Responsibility (OBR). The manifesto contained two further key passages designed to present Labour as a party of fiscal rectitude:

A Labour government will cut the deficit every year. The first line of Labour's first Budget will be: 'This Budget cuts the deficit every year'. This manifesto sets out that we will only lay a Budget before the House of Commons that cuts the deficit every year, which the OBR will independently verify. We will get national debt falling and a surplus on the current budget as soon as possible in the next parliament. This manifesto sets out that we will not compromise on this commitment. (Labour Party 2015: 2)

The next Labour Government will balance the books. We will only lay a Budget before the House of Commons that cuts the deficit every year, which the Office for Budget Responsibility will independently verify. We will get national debt falling and a surplus on the current budget as soon as possible in the next Parliament and these fiscal commitments will not be compromised. We will tackle the root causes of the deficit by building a more productive economy with living standards that rise year-on-year. (Labour Party 2015: 17)

Yet on the day after the election, a *Financial Times* headline read: 'Ed Miliband's move to the left lost Labour the election' (Pickard 2015).<sup>3</sup> While the manifesto didn't premise the achievement of its fiscal commitments purely on reductions in public expenditure,<sup>4</sup> the prevailing assumption that deficits are to be avoided in normal times, is indicative of subscription to a particular form of economic orthodoxy. A primary indicator of this allegiance in the manifesto was the pledge to keep the UK's rate of corporation tax as the most competitive in the G7 (Labour Party 2015: 19). There is strong evidence that corporate tax competition and the consequent 'race to the bottom' reduces the capacity of governments to raise revenue through progressive forms of personal taxation (Ganghof and Genschel 2008). Thus a commitment to maintaining company taxation at a competitively low level could potentially erode revenues from personal taxation regardless of the marginal rate. Under a regime characterized by deficit fetishism, compromised revenues in the absence of expenditure cuts can only damage a government's budget balance. It follows that surpluses can only be delivered through expenditure cuts or the achievement of accelerated growth (which spills over into an improved tax take).

Furthermore, Labour (via then shadow Chancellor Chris Leslie) soon indicated that it was willing to support the Conservative government's proposal to enact a so-called budget surplus law (*Sunday Times*, 5 July 2015).<sup>5</sup> The idea of 'constitutionalizing' fiscal rectitude through balanced budget laws is neither new nor unique to the UK, but it was propelled to the top of the political agenda following Chancellor George Osborne's Mansion House speech on 10 June

(Osborne 2015), a few weeks after the election. With an appropriately rhetorical nod in the direction of Victorian values via an approving reference to the Commission for the Reduction of National Debt that last met in 1860 under Palmerston, Osborne clarified the scope and purpose of such a measure: ‘we should now aim for a permanent change in our political debate and our approach to fiscal responsibility – just as they have done in recent years in countries like Sweden and Canada.’ (Osborne 2015)<sup>6</sup> Claiming that the election result of 2015 represented the ‘comprehensive rejection’ of ‘those arguing for borrowing and more spending’, the speech proposed the idea of a ‘permanent settlement’:

A settlement where it is *accepted across the political spectrum* that:

- without sound public finances, there is no economic security for working people.
- that the people who suffer when governments run unsustainable deficits are not the richest but the poorest.
- and that therefore, in normal times, governments of the left as well as the right should run a budget surplus to bear down on debt and prepare for an uncertain future. (Osborne 2015, emphasis added)

Of course, the idea is far from uncontroversial (*The Guardian*, 12 June 2015)<sup>7</sup> and analysis by IMF economists (Ostry, Ghosh and Espinoza 2015) suggests that in countries such as the UK with ‘fiscal space’ (essentially where the market is happy to buy debt and where default risk is unlikely to add a premium to bond yields), there is no drastic technical reason to reduce debt to GDP ratios. Indeed the Ostry *et al* analysis goes further to suggest that the costs of paying down the debt are

likely to eclipse the small reduction in sovereign risk. As Wren-Lewis (2015b) points out, in the UK case this would involve sustaining a debt to GDP ratio of roughly 80%, with annual budget deficits of around 3%. The rapid erosion of government attention towards the deficit after the vote to leave the European Union in June 2016 confirms that deficit reduction was not in fact the only possible policy.

What is interesting about this developing story is the widening gap between the tightening partisan consensus around deficit fetishism (at least until the surprise election of Jeremy Corbyn to the leadership of the Labour Party in September 2015) on the one hand and the clear indications that the *technical* propriety of perpetual surplus budgeting (and thus, in all likelihood, austerity) remains a contested topic among professional economists. Deficit fetishism may represent a component of the trend to ‘depoliticisation’ that has been characteristic of the British politics of economic management over recent decades (Burnham 1999, 2001, 2014). The text of Osborne’s Mansion House speech quoted above conforms reasonably well to the central claims of the depoliticisation literature – that state managers seek to remove aspects of economic policy-making from the arena of political conflict. Indeed, deficit fetishism, as understood here, was on the brink of becoming politically non-controversial in the UK – at least in terms of the two main parties.<sup>8</sup> Also, as we have seen, deficit fetishism circumscribes the range of plausible policy instruments and inserts certain fundamental barriers in the way of developing economic policy alternatives along broadly (neo)Keynesian lines.

Yet, the dissensus in the economic blogosphere is striking. Admittedly, much of

the critique of the position taken by the mainstream political class on deficits has been developed by an assortment of centre-left Keynesians and broadly heterodox economists. Even if the professional economics commentariat does position itself on this issue more-or-less according to the political spectrum, then it is still striking that this has not been the case in terms of inter-party competition. The intellectual authorization of deficit fetishism is visible and traceable. Its importance in securing influence in European policy circles (and its articulation with the ordoliberal frames of the EU macroeconomic establishment) should not be forgotten (Blyth 2013, Dellepiane-Avellaneda 2015, Sinclair 1999). But non-austerian alternatives have been readily available and, if anything, have enhanced their position since the onset of the crisis (the IMF being perhaps the most interesting site in this regard – see especially Ban 2015). The question at hand is why the balance (or at least the contention) within the professional literature has not translated into political contestation across traditional party politics?

The British case discussed here seems to be an exemplar of political bullshit. For a key period at least, an easily contestable (or more or less refutable) set of claims – about Labour profligacy in office and about the need to reduce budget deficits and public debts at all cost – became an uncontroversial premise of British macroeconomic debate. This is not just a case of the successful propagation of a particular narrative on one side of the partisan divide. The real story here is the capacity of the dual claim (a mixture of historical assertion and a quasi-technical view of what is best for the economy) to rhetorically entrap the party to whom that very claim did the most damage. The literature on rhetorical entrapment reminds us that actors do not have to be persuaded in order to adopt a position or

agree to an outcome to which they were hitherto opposed. It is enough for them to be unable to argue against a proposition for them to accede to it (see Hansen 2006, Krebs and Jackson 2007, Schimmelfennig 2001). Thus adding political bullshit into the mix allows us to posit situations where it becomes impossible to argue against claims that have near to zero veracity.

### **The Age of Bullshit: Political Discourse in the 21<sup>st</sup> Century**

Understanding the success of political bullshit is an important challenge for political science, since it is inconsistent with many of the assumptions of standard models, predicated as they are on actors having some connection with a shared reality. Here we discuss some avenues of enquiry that may contribute to a better understanding of the apparent growth of bullshit discourses in the advanced democracies.

The adoption of pro-cyclical macroeconomic policies in the UK after the financial crisis is a particularly useful case, because we observe a bullshit political discourse justifying a political choice that damaged the material interests of many voters, yet won widespread support. The difficulties of the UK Labour party in winning broad support for an alternative more intellectually plausible account are particularly significant because they are inconsistent with past experience. The consensus view in political economy in the post-war period was that political parties of the left would favour expansionary policies to secure full employment, whilst those of the right would prefer contractionary policies to contain inflation (Hibbs 1977). The reasons for this were clear: those policies implied alternative distributions of gains and losses for the parties' respective constituencies. By adopting a more

expansionary approach, left parties would improve the condition of their lower income voters, who were more exposed to unemployment and less exposed to inflationary risk.

If UK Labour was unable to sustain such a policy in the 2010s, it was not because its electorate no longer had a shared interest in more expansionary policy: Labour MPs continue to represent the regions of the UK with the lowest incomes and highest unemployment. So we need to examine other reasons why political bullshit appealed so strongly to British voters, and why Labour found it so difficult to push back against it.

There are perhaps two related lines of argument might seek to explain why debt/deficit bullshit has been so successful in the UK. The first, advanced most forcefully by Wren-Lewis, concerns the role of the media reproducing particularly corrosive forms of economic illiteracy – of which the idea that deficits are ipso facto ‘bad’ is a strong example. Indeed he has coined the term ‘mediamacro’ to describe the particular way of narrating the economy associated with (especially) the broadcast media. He defines mediamacro as ‘a set of ideas about macroeconomics promulgated by the media that seem very different to the macro taught to economic students’ (Wren-Lewis 2015c).<sup>9</sup> Mediamacro does not work in isolation from the political sphere, and it is here that perhaps we can see the performative aspects of political bullshit:

What we get as a result is a bias against the facts. In the case of Labour and the deficit, because Labour chose fatefully not to challenge the Conservatives

on this, the media takes this as confirmation that it must be true rather than checking the facts themselves, or shy away from presenting the facts because that would be seen as 'too political'. Myth then becomes a fact that even some Labour MPs start believing, and when someone actually stands up for the facts they are assumed to be dishonest or a slightly mad professor. (Wren-Lewis 2016)

The second line of argument would ponder why some bullshit claims are better placed to secure traction than others. In this respect, the fetishization of deficits as 'bad' taps somewhat successfully into a particular type of folk wisdom about the economy – the more or less straightforward analogization of an economy (in the case of the UK, a monetary sovereign) with a household. Needless to say, using household debt as a metaphor for sovereign debt is an egregious fallacy of composition (Krugman 2013, Matthews 2013). But ideas such as 'maxing out' the 'national credit card' (see, for example, *The Times* 15 September 2015<sup>10</sup>), while meaningless to economists, offer a clear and time-efficient tool for translating a particular view of economic propriety into public discourse.

However it is not clear why these factors work so much more strongly today than in the post-war period, when Hibbs observed a clear political debate around distinct and plausible macroeconomic theories between the major political parties. What has changed, we suggest, is that the fundamental shifts in the political economy of advanced democracies since the 1970s have both stripped political parties of their power to decide policy, and therefore weakened them as carriers of coherent ideologies and policy programmes. In this post-party

environment (which Colin Crouch [2004] describes as ‘post-democracy’), policy decisions are the preserve of unelected technocrats such as central bankers, and elected politicians not only can do little to influence the fundamental levers of policy, but also believe that their job is to intervene as little as possible in economic management.

This promotes the success of political bullshit in two main ways. First, the futility of supporting political parties whose purpose is no longer to manage the state to the benefit of broad social interests, but instead is to promote the political careers of party officeholders and aspirant officeholders, weakens the connection between voters, activists and the party leaders. As a result, party machines become increasingly distant from the social interests they notionally represent, and more reluctant to express clear identifiable policy positions (Katz and Mair 1995, Blyth and Katz 2004). Second, when the main policy decisions are driven by technocratic rationales or constrained by the pressures of financial markets, the pay-off for developing concrete policy proposals diminishes, whilst the pay-off for producing inoffensive or vaguely plausible bullshit discourses remains intact: bad ideas drive out the good.

But we can go further and suggest that there is an intimate relationship between the hollowing out of democracy described by Mair and others and the very discourse that is used to underpin austerity. The intellectual antecedents of austerity thinking (time inconsistency, public choice critiques of government overload, Bocconi school thinking on fiscal deficits etc) are also inherently suspicious of democratic contestation, and popular intervention in the

management of the economy more generally. One of the ways in which this skeptical view of government economic interventionism plays out is in its reluctance to accept the kinds of expertise which underpins policies designed to make the economy work more efficiently and equitably. Hostility to scientific discourse about the economic, and resort instead to the homely bullshit of sound money, protection of property and free market exchange is an effective way of generating support for policies which may not be in the broad public interest, but which appeal to broad public sentiments.

## **Conclusions**

In this paper we have argued that there is a connection between the simultaneous rise of bullshit in political discourse and the rise of austerity and deficit fetishism as the dominant feature of macroeconomic policy, and that the rise of bullshit (and thus of austerity policies) is rooted in the broader hollowing out of western democratic politics. Political parties seem less connected to their electorates and less likely to develop clear ideological and policy positions which appeal to their voters and allow them to defend their interests. This is a function of parties' declining ability to use policy levers in favour of their electorates due to the success of neoliberal reformers in entrenching the depoliticization of key policy-making powers and removing large areas of economic policy from the sphere of political debate. The 'hollowing out' of democracy described by Peter Mair has made clear ideological statements less profitable for parties, leading to party competition revolving increasingly around bullshit discourse as the payoffs for developing sound policy decline and bad ideas – in a kind of Gresham's law of

ideational contestation<sup>11</sup> - drive out good.

Our argument here poses a challenge to political science. As well as taking seriously the ways in which ideas and discourses shape social interests, we also need to consider that much political discourse is meaningless and unfalsifiable: in short, it is bullshit. We arrive at a situation where voters are not simply overwhelmed with information; much of that information is bullshit, and voters's capacities to distinguish plausible truth claims from bullshit is severely compromised. This problem is not restricted to the discourses of contemporary populists such as Donald Trump; indeed our focus has been the apparently technocratic and 'responsible' claims of the elite consensus that preceded what is often described as 'post-truth politics'. Developing the tools to observe and understand the origins and uses of political bullshit should become a priority.

## Notes

1. See <http://www.telegraph.co.uk/comment/letters/11578326/Ed-Miliband-loses-credibility-by-refusing-to-admit-that-the-last-Labour-government-overspent.html> [accessed 18 May 2017] and <http://blogs.spectator.co.uk/coffeehouse/2015/04/milibands-refusal-to-admit-that-labour-overspent-could-cost-him-dear/> [accessed 18 May 2017]

2. A significant improvement in the Tories' rating for economic competence appeared to coincide with the retreat from strict austerity budgeting in 2013. See <http://www.theguardian.com/politics/2013/aug/12/guardian-icm-poll-tories-economic-confidence> [accessed 18 May 2017]
3. Tony Blair had said much the same six months earlier: <http://www.dailymail.co.uk/news/article-2891948/Miliband-Left-wing-win-election-says-Blair.html> [accessed 18 May 2017]
4. The manifesto also promised a rise in the marginal rate of personal taxation for the highest earners (a return to the 50p rate) and a generalised crackdown on tax avoidance.
5. [http://www.thesundaytimes.co.uk/sto/news/uk\\_news/article1577182.ece?CMP=OTH-gnws-standard-2015\\_07\\_05](http://www.thesundaytimes.co.uk/sto/news/uk_news/article1577182.ece?CMP=OTH-gnws-standard-2015_07_05) [accessed 18 May 2017]
6. On Sweden and the Social Democrat-led government's wish to relax the budget surplus target: <http://www.wsj.com/articles/sweden-seeks-to-drop-budget-surplus-target-1425379037> (*Wall Street Journal*, 3 March 2015) [accessed 18 May 2017].
7. <http://www.theguardian.com/politics/2015/jun/12/osborne-plan-has-no-basis-in-economics> [accessed 18 May 2017]
8. Aggressive deficit reduction targets were also outlined in the UKIP Manifesto (UKIP 2015: 8-9). The Liberal Democrat manifesto (Liberal Democrats 2015) spoke in rather less precise terms about reducing the deficit 'fairly'. But there was no question that annual deficits should be eliminated and debt to GDP ratios should be reduced significantly.

9. Wren-Lewis suggests further that media macro tends to be the work of political journalists rather than trained economics correspondents.
10. <http://www.thetimes.co.uk/tto/news/politics/article4557053.ece>  
[\[accessed 18 May 2017\]](#)
11. We are grateful to one of the anonymous referees for this suggestion.

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