



Retrospective voting under supranational constraints

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ABSTRACT

Economic voting is commonly seen as a cornerstone of democratic accountability. Recent work argues that globalization attenuates it by blurring responsibility and constraining the room to maneuver of domestic governments. Here we explore the consequences of another factor that also shrinks policy maneuver: Membership of Supranational Institutions. In a pre-registered survey experiment fielded in Spain in May 2018, we manipulate information both about economic performance and about the Eurozone rules that constrain domestic policy-making. Our results show that supranational constraints do not attenuate accountability for bad economic outcomes. Instead, supranational constraints lead to a backlash against both the incumbent and other mainstream parties. We interpret the evidence as suggestive that voters blame these parties for having consented to the supranational rules in the first place and for how their implementation limits domestic responses to bad economic performance. These results show that the room to maneuver argument of the globalization literature cannot be simply extended to membership of supranational organizations.

1. Introduction

Retrospective economic voting is commonly understood as a cornerstone of democratic accountability (Key, 1966). Seminal work by Hellwig (2001), however, introduced what can be denoted as the *room to maneuver* argument. It states that globalization may weaken the connection between economic outcomes and incumbent support, as economic interdependence blurs responsibility over economic performance and reduces governments' room to maneuver in policy-making (Fernández-Albertos and José, 2002; Hellwig and Samuels, 2007).

Recent elections, however, suggest that economic voting may be well and alive, even in contexts of deep economic integration and reduced room to maneuver. Studying voter responses to the Great Recession, Bartels (2014) shows that incumbent parties incurred massive electoral losses all across Europe. This occurred even though European Union institutions had substantially limited domestic policy responses. The pattern of election outcomes suggests that citizens punished governments for austerity measures and the bad economic performance, notwithstanding the supranational responsibility over those policies.

This raises the question of whether supranational constraints, such as those arising from membership in the Eurozone, reduce economic voting. The literature has mostly assumed that this is the case. Since supranational constraints reduce the room to maneuver of national governments, it could be argued that these constraints have similar implications as those attributed to globalization. Yet the existing empirical tests yield only mixed results and have almost exclusively relied on observational data (Costa-Lobo et al., 2012; Bellucci, 2014; Magalhães, 2014; Costa-Lobo and Pannico, 2020).

Our paper sheds light on this question by deploying a pre-registered experiment to test whether the room to maneuver argument extends to membership in the European Union.¹ Our design manipulates both the country's economic performance and information about Eurozone constraints on domestic policy-making, which advances previous work in the area (Kosmidis, 2018).² Our main contribution is to show that supranational constraints may have the opposite effects to the ones predicted by the literature on globalization (Hellwig, 2001, 2015; Hellwig and Samuels, 2007). Instead of cushioning the effects of bad economic performance on incumbent support, supranational constraints like the

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¹ The full (anonymized) Pre-Analysis Plan is available in the AsPredicted repository: https://aspredicted.org/ED_CIE.

² We take the evidence on how globalization depresses economic voting to the bank (Hellwig, 2001; Hellwig and Samuels, 2007; Duch and Stevenson, 2008; Alcañiz and Hellwig, 2011). For that reason the experimental design does not manipulate perceptions about how globalized the economy is. We make the assumption, given previous work, that such information reduces accountability for economic outcomes. Our goal is to evaluate whether information about supranational constraints also depresses economic voting.

ones imposed by the European Union generate a backlash against the domestic government. The presence of supranational constraints thus *increases* the electoral punishment when there is bad economic performance, instead of *reducing* it as the literature had previously assumed. The evidence also suggests that the backlash may affect not just the incumbent, but also other mainstream parties that support the existence of the supranational rules. We interpret this as suggestive that citizens make parties co-responsible for the policy constraints and punish them for the reduced room to maneuver that does not allow governments to respond to bad economic times.

2. The room to maneuver hypothesis and supranational constraints

The “Room to Maneuver” argument states that globalization weakens economic voting (Hellwig, 2001). The logic of the argument goes as follows. To be internationally competitive and attract capital in global markets, domestic governments are encouraged to lower taxes, implement welfare reforms, and keep balanced budgets (Hays, 2003). The pressures of international markets, thus, tie the hands of national policy-makers and narrow the range of policy options. Globalization also increases countries’ exposure to international cycles, so domestic economic outcomes become more dependent on international factors (Kose et al., 2003; Kayser and Peress, 2012). As a result, voters become less likely to attribute responsibility for the economy to the national incumbent (Fernández-Albertos and José, 2002; Hellwig et al., 2008) and economic voting declines (Hellwig and Samuels, 2007; Duch and Stevenson, 2008; Singer and Carlin, 2013).³

The room to maneuver argument could extend to membership in international organizations, such as the European Union. After all, international institutions can also constraint domestic policies and, thus, reduce the room to maneuver of national governments. Therefore, one could expect that joining international institutions that place constraints on economic policy-making will also make voters discount economic outcomes when evaluating the incumbent. This argument would imply that membership in the European Union, and the Eurozone in particular, leads to a moderation in economic voting.

The empirical evidence, however, is scarce and mixed. On the one hand, Costa-Lobo et al. (2012) and Bellucci (2014) suggest that voters who perceive the EU to be responsible for the economy were less likely to punish the domestic incumbent for the Great Recession.⁴ On the other hand, Magalhães (2014) finds that economic voting was still predominant in the 2011 Portuguese elections even though these were held following a bailout agreement with the EU. Likewise, Bartels (2014) and Costa-Lobo and Pannico (2020) show that national governments were severely punished for bad economic performance and austerity, in spite of the fact that austerity measures were encouraged by European institutions.

We argue that this line of research presents some weaknesses. Existing evidence relies on observational evidence, and this can be problematic because both economic evaluations and responsibility attributions can be endogenous to partisan biases. As a result, voters can use the European Union as a scapegoat to exonerate their preferred party for their performance (Hobolt and James, 2014). Studying the intensity of economic voting under supranational constraints requires making sure that the vote is endogenous to the perception of supranational constraints and not the other way round. This highlights the need for experimental research in this area. The most important experimental work to date is Kosmidis (2018). He shows that manipulating

perceptions about the Greek government’s capacity to implement policy does *not* affect economic voting. The experimental design, however, presents a limitation: it manipulates information about the room to maneuver, but not about economic performance. Hence, the analysis has to rely on respondents’ evaluations, which may be affected by partisan biases.⁵ In addition, the mechanism by which economic voting operates remains unclear. Our experimental design advances on this by manipulating both perceptions of international constraints and economic outcomes, and by exploring several explanatory mechanisms. In any case, we interpret the lack of support for the room to maneuver argument in Kosmidis’ experiment as suggestive that supranational constraints might have different consequences for retrospective voting than economic globalization.

There are, indeed, reasons to believe that supranational constraints and economic globalization might operate differently. Membership in international organizations -such as the European Union- is not exactly the same as integration into global markets. While the room to maneuver is reduced in both cases, the nature of the constraints diverges. When economies open to international competition, countries need to adapt in order to remain competitive, but eventually there is no *explicit* policy prescription. In contrast, membership in an international institution can entail abiding by formal rules that explicitly rule out certain policy choices. Members of the Eurozone, for instance, are bound by limits in budget deficits and debt-to-GDP ratios.

This sort of supranational constraints may have different consequences for mass behavior than economic globalization. Voters can perceive these constraints as more invasive, particularly in moments of crisis when national governments cannot decide their own policy response. Indeed, there is evidence that globalization and supranational constraints have disparate effects on satisfaction with democracy. While economic integration increases satisfaction with how democracy works (Thomas, 2016), there is evidence that supranational constraints reduce it. Armingeon and Guthmann (2014) show being part of the Eurozone eroded satisfaction with democracy during the Great Recession. Rufiz-Rufino et al. (2017) also report a negative impact of the political conditionality of Eurozone bailouts on satisfaction with democracy, as voters become aware of the limits of democratic choice in these contexts.

This differential effect between globalization and supranational constraints might extend to mass behavior, in general, and voting, in particular. While the room to maneuver argument predicts a weakening of retrospective accountability as a result of *implicit* policy constraints, this may not be the case when it comes to *explicit* institutional constraints. A key reason may be that international organizations are not completely exogenous to domestic governments. Not only do governments have a say in whether a country joins the organization and thus accepts the room-to-maneuver limitations, they will also be part of the decision-making process of the international organization. In the case of the European Union, national incumbents influence decisions at the EU-level. They nominate candidates for the Commission, they participate directly in the Council of Ministers and the Eurogroup, which shape economic policy in the whole Union. And eventually, governments can decide to abide with the supranational rules or challenge them. As a result, voters may consider that national governments are responsible for the existence of supranational constraints and hold incumbents accountable for their consequences on the domestic economy.

This provides us with competing expectations with regards to retrospective accountability under supranational constraints. Applying the logic of the room to maneuver hypothesis, we would expect that supranational constraints reduce accountability for bad economic outcomes. This is the baseline expectation that we registered on our Pre-Analysis Plan. On the other hand, if voters consider that the incumbent is responsible for the existence of these institutional constraints and

³ All of this evidence is observational. Only Jensen and Guillermo Rosas (2019) test experimentally the impact of perceptions of economic openness on the vote and find a small weakening of economic voting in a US sample.

⁴ Both articles focus on Southern Europe which were the countries most affected by the Great Recession, together with Ireland.

⁵ Kosmidis focuses as well on the effects of prospective economic expectations, instead of the more canonical retrospective economic performance.

for how they operate, there may hold the incumbent accountable and punish it for the bad economy. The design of our experiment, which we describe in the next section, allows us to test this and to explore mechanisms that may account for whether economic voting declines or not under supranational constraints.

3. Design

We fielded a pre-registered survey experiment in Spain using a sample of 1,519 respondents that meets gender, age, and regional quotas.⁶ Spain is a suitable case study for our theory. First, it is a country that is part of the European Monetary Union. This means that it has a curtailed policy-making capacity, as the restrictions of EU membership (ie: the Stability Pact) and being part of the European Monetary Union (that transfers monetary policy to the European Central Bank) limit the government's room to maneuver. Secondly, Spain has been particularly constrained by European institutions, as its banking sector received a financial bailout in 2012. This bailout consisted of up to 100 billion €⁷ for the government to shore up its banks. As a result, Spain signed a Memorandum of Understanding (MoU) in July 2012 by which the Spanish authorities committed to *take all the necessary measures to ensure a successful implementation of the program* and to provide the European Commission, the ECB and the IMF with all information required to monitor progress in program implementation and to track the financial situation. The MoU included more than thirty conditions to have access to the bailout. These conditions, apart from those specific to the financial sector, included others such as correcting the excessive deficit situation and implementing structural reforms such as reforming the taxation system or implement labor market reforms, among others. Hence, despite being less severe than in other countries and, in principle, being just a financial sector bailout, there were strong strings attached and the government's room to maneuver was certainly reduced.

The survey experiment was conducted in May 2018. At that time, the right-wing Partido Popular (PP) was leading a single-party government. This enhances the clarity of who holds power over policy-making at the national level. What is more, the economic situation was ambiguous enough to provide good conditions to experimentally manipulate participants' perceptions about it. Indeed, while the Spanish economy was growing at a 2.5% rate, the expansion had slowed down considerably -being the worst economic performance since 2014-, unemployment was on the rise again, and the country was still running a fiscal deficit, which was above the goal established by the European Union. As the economy tends to be a salient issue for individuals, this ambiguous economic situation enables us to more effectively manipulate citizens perceptions of how well the economy was doing.

The experiment employs a cumulative treatments design. First, two thirds of the sample are exposed to a statement highlighting the bad aspects of the economic situation in Spain (*bad economy treatment*). The remaining one third do not see any statement about the economy (*control*). Among those exposed to the *bad economy treatment*, half of them (i.e. a third of all respondents) are also exposed to a statement emphasizing the constraints that Spain faces as a member of the Eurozone (*supranational constraint treatment*). The design, thus, defines three experimental groups, each comprising a third of the sample⁸

1. **Control group:** respondents not exposed to any statement.

⁶ The survey was administered by Netquest. The sample is drawn from their online panel.

⁷ The Spanish government eventually used 43 billion € of the whole credit line.

⁸ We have very good balance across experimental groups, so all analyses included here do not include covariates. In Table A.2 and Table A.3 we report the balance test and the results with covariates which remain virtually the same.

2. **Bad economy group:** Respondents exposed to the negative economy vignette only.
3. **Bad economy *and* supranational constraints group:** Respondents exposed to both statements.

The structure of the experiment is presented graphically in Fig. 1. The text of these statements is shown in Table A.1 in the Online Appendix.

Interestingly, all respondents are exposed to the same globalization levels, so our experiment allows us to test the effect of supranational constraints, understood as institutional restrictions over policy-making, keeping economic integration constant. The main outcome of interest is support for the incumbent. We elicit this information by measuring respondents' propensity to vote (PTV) for the incumbent, the Partido Popular (PP), using a 0–10 scale. The PTV for the remaining nationwide parties - Socialist Party (PSOE), Podemos, and Ciudadanos - is also measured. As an additional indicator of incumbent favorability, we also capture the government's approval.

In addition to these outcomes, we include a series of survey items to assess how the experimental manipulations are treating respondents. First, following the *bad economy treatment*, we include a manipulation check that captures the respondent's retrospective evaluation of the economy. This allows us to evaluate whether this treatment has the intended effect of worsening sociotropic perceptions of the economic context.⁹ Second, to evaluate how the *supranational constraints* manipulation treats participants, we include two types of questions: (1) An item capturing evaluations of the European Union, and (2) Several items capturing responsibility attributions over economic outcomes.¹⁰ Related to this, the questionnaire includes a *placebo test* where we measure respondents' responsibility attribution over abortion. Abortion is an issue area that is not affected by Eurozone rules. Hence, we expect that there will be no differences in responses to this item across treatment arms.¹¹

4. Results

Our main analysis explores the effects of both experimental manipulations on the probability to vote for the incumbent party. Fig. 2 illustrates the theoretical expectations that arise of extending the *room to maneuver* argument to the European Union. According to it, we should, first, observe that the *bad economy* treatment reduces the probability to vote for the incumbent, in line with the economic voting literature. Hence the expected negative treatment effect. The *bad economy & supranational constraints* manipulation - by adding information about the constraints of Eurozone rules - should, however, weaken economic voting, as the incumbent party becomes less responsible over economic outcomes. The negative impact of economic performance should shrink, potentially dropping to zero.¹²

Fig. 3 presents the *actual* empirical evidence from our experiment. We do find that the bad economic treatment reduces the probability to vote for the Partido Popular, albeit not significant at conventional levels. Crucially, the addition of supranational constraints does *not* soften the impact of the bad economy on the vote. On the contrary, it actually

⁹ This manipulation check is presented in Figure A.1 in the Online Appendix.

¹⁰ Responsibility attribution evidence is presented on the left panel of Fig. 5 and in section A.5 in the Online Appendix.

¹¹ The placebo test is reported in Figure A.6 in the Online Appendix.

¹² The specific effect sizes in Fig. 2 should not be taken as concrete predictions. Their purpose is to illustrate the nature of the empirical implications of the room to maneuver argument. Namely, that the bad economy treatment should depress support for the incumbent, but that exposure to the existence of supranational constraints should reduce the negative effect of the bad economy information, potentially fully compensating for it.

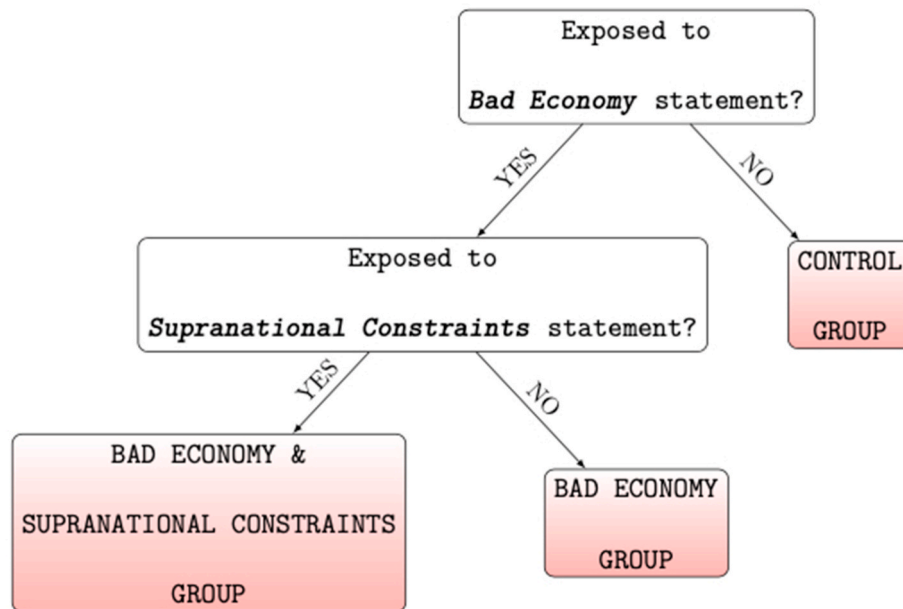


Fig. 1. Structure of the experiment. Treatment arms.

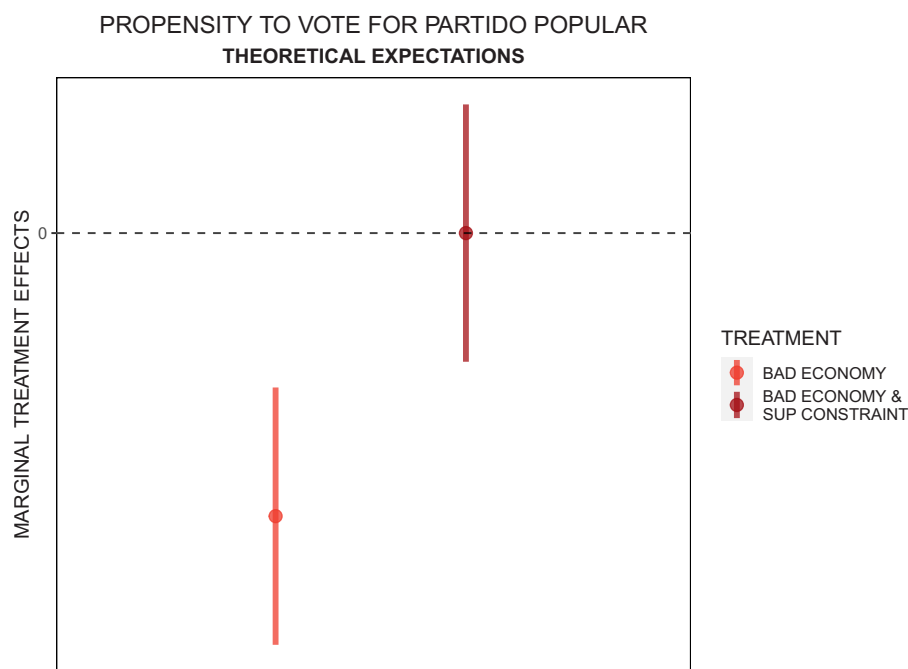


Fig. 2. Propensity to vote for the incumbent party (PP). Theoretical Expectations that arise from extending the *Room to Maneuver* argument.

amplifies the negative impact of poor economic outcomes on the probability to vote for the incumbent.¹³ Indeed, the impact of the *bad economy & supranational constraints* treatment is negative and statistically

¹³ The point estimate of the ‘bad economy & supranational constraints’ average treatment effect is 0.43. While this effect may seem small at first glance, it actually represents a 20% drop in the propensity to vote for the incumbent relative to the control group. The control group average is 2.3 and the average in the ‘bad economy & supranational constraints’ treatment group is 1.86.

significant.¹⁴

This result suggests that we cannot simply extend the room to maneuver argument to the case of supranational constraints. Awareness that the government has its hands tied and that an international organization can limit policy-making does not alleviate the negative impact of the economy on support for the incumbent. Instead, these institutional constraints generate a backlash: Citizens react against the incumbent when the economy is not delivering and the governing party

¹⁴ The impact of the supranational constraints manipulation has the same sign when we look at incumbent approval, although in this case we cannot reject the null hypothesis. See Figure A.7 in the Online Appendix.

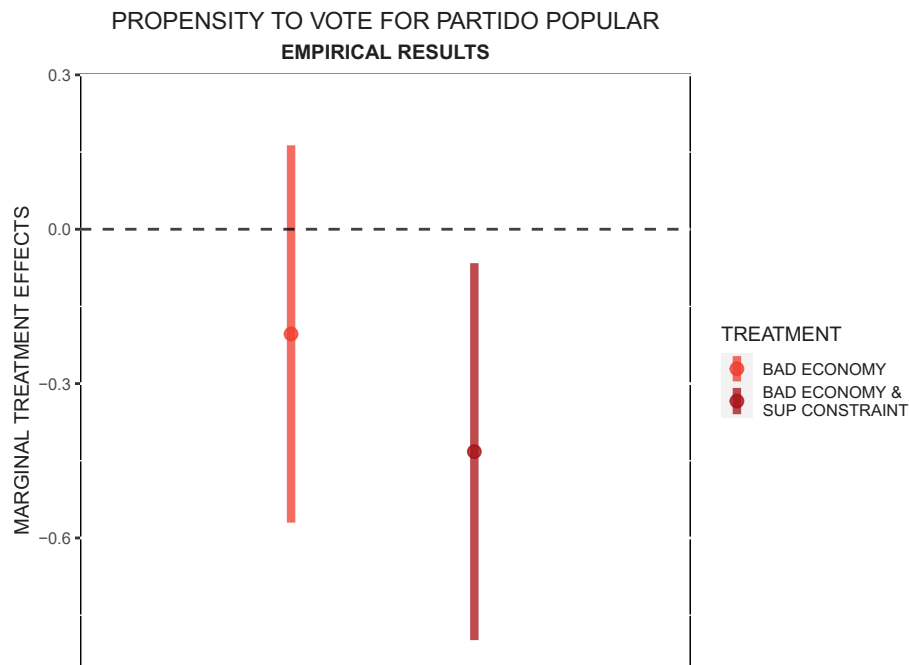


Fig. 3. Propensity to vote for the incumbent party (PP). Empirical Findings: Treatment effects with 95% confidence intervals -right panel-. The outcome variable ranges from 0 -least likely to vote- to 10 -most likely to vote-. Control group average: 2.3.

is facing restrictions to provide policy responses.

We now assess whether this backlash against the incumbent also affects support for other parties. We focus on the main opposition party at the time, the Socialist Party (PSOE). The PSOE is a mainstream party and, together with the PP, they constitute the only two parties that had ever been in office between 1982 and 2019. Both parties are also pro-European. Fig. 4 presents the treatment effects on the propensity to vote for PSOE. The results indicate that, as the main opposition party, it benefits from the *bad economy* manipulation: the treatment effect is positive and statistically significant. This is in line with the conventional

expectation of the economic voting literature. The key result, however, arises when respondents are also exposed to information about the existence of supranational constraints on the government. This experimental manipulation cancels out the positive boost of the bad economy. Hence, the anti-incumbent backlash produced by the *bad economy & supranational constraints* treatment does *not* translate into increased support for the PSOE. Quite the contrary, providing information about the Eurozone constraints in a bad economic context also hurts the main opposition party. Hence, the anti-incumbent backlash thus also seems to affect the main pro-EU mainstream party that is in opposition. In

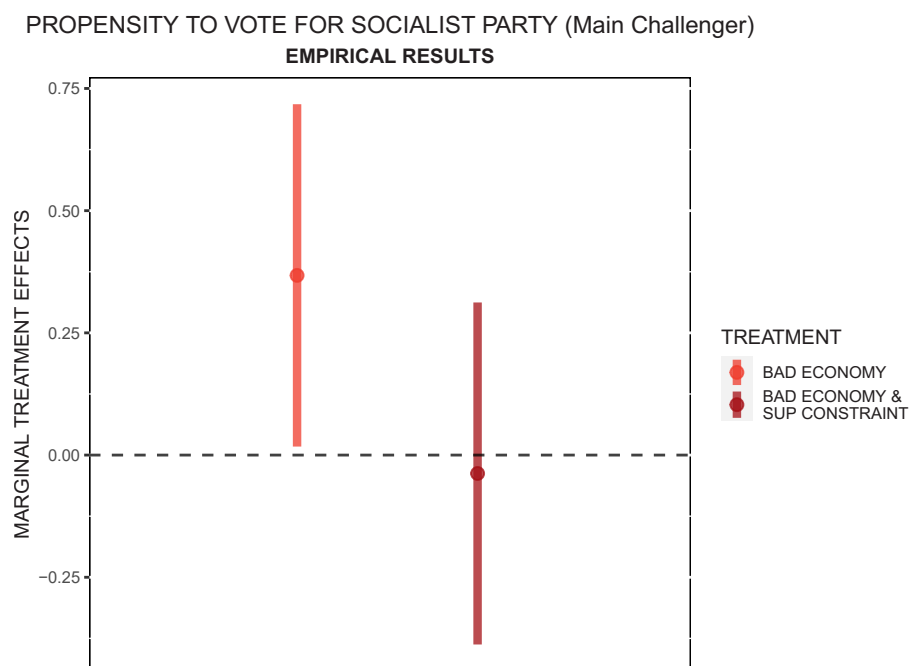


Fig. 4. Propensity to vote for the main opposition party (PSOE). The outcome variable ranges from 0 -least likely to vote- to 10 -most likely to vote-. Treatment effects and 95% CI. Control group average: 3.06.

addition, the Online Appendix presents evidence suggestive that the punishment also affects the other pro-EU party in Spain, Ciudadanos.¹⁵ In sum, the evidence is consistent with the argument that citizens hold accountable for the supranational constraints all parties that are perceived to be aligned with them, not just the party in office.

To account for this electoral backlash, we explore two (complementary) mechanisms: the effect of supranational constraints on *responsibility attributions* and, following Konstantinidis et al. (2022), on perceptions about *government effort* to achieve its economic goals. To evaluate the first mechanism, we exploit a survey item that measures responsibility attribution over the economy. This variable is measured in a 0–10 scale, 0 means “the government has **no responsibility** over the performance of the economy” and 10 means “the government has **full responsibility** over the performance of the economy”. To examine the second mechanism, we explore the impact of the manipulation on an indicator that captures the degree of agreement with the statement “the government has made a **great effort** to implement the promised economic policies, despite the pressure of supranational institutions and international markets”, where 0 means “I disagree completely” and 10 means “I agree completely”. The results are displayed in Fig. 5.

The left panel shows that information about the existence of supranational constraints does not reduce attribution of responsibility to the government over the economy. Neither experiment substantially changes perceptions of responsibility relative to the control group. Even when respondents are told about the supranational limitations to policymaking, they still think that the national government is responsible over economic outcomes.¹⁶ The right-hand panel evidence helps explain why this is the case. It shows that, despite the existence of explicit EU constraints, citizens still expect governments to implement their policy program. If they fail to do it, they consider that the government has not tried hard enough. Indeed, the *bad economy & supranational constraints* treatment effect is negative, statistically significant, and substantively large. This evidence thus implies that supranational constraints do not change the expectations that governments should still attempt to achieve their policy goals. We interpret that this is the driving force behind the backlash penalizing incumbents for bad economic outcomes in the presence of supranational policy limitations. This could also explain why mainstream opposition parties are also punished: They might be blamed for accepting the supranational rules without contestation.

5. Discussion

The empirical evidence that we presented suggests that not all restrictions in government’s room to maneuver generate the same voter reactions. A common expectation in the literature is that supranational constraints operate like integration in global markets and, as a consequence, economic voting should decline. Our results suggest otherwise: Voters punish the domestic incumbent *more* for the state of the economy when they also face supranational institutional restrictions. In our experiment, we find that respondents exposed to the treatment that highlights the presence of explicit economic constraints are less likely to support the party in power. This also depresses support for other mainstream pro-European parties.

The explanation we propose is that voters acknowledge that supranational constraints are the product of domestic political decisions, and eventually they require the acceptance by national governments. The

¹⁵ Figure A.10 and Figure A.11 in the Online Appendix we present results for the remaining national parties in Spain. The evidence suggests that Ciudadanos, a centrist and pro-European mainstream party, is also punished when respondents are exposed to supranational constraints. On the other hand, Podemos, often classified as a populist party and critical of the Euro, is not penalized.

¹⁶ The Online Appendix presents similar evidence with respect to other responsibility attribution indicators. See Figure A.3 to Figure A.5.

evidence we report indicates that voters consider that supranational constraints are not a given: They are the product of prior political choices. If governments do not try to implement their policy promises—by bending or reformulating those rules if necessary—, they can be penalized.

Konstantinidis et al. (2022) show that the existence of supranational constraints can induce voters to place more emphasis on the incumbent’s inputs and effort instead of the outcomes. Since final outcomes can be determined by the external environment, original intentions rather than the actual policy outcomes are assessed by voters. This becomes even more intense when economic results are bad, as failed attempts to alter the status quo may in fact be evaluated positively. In a similar vein, Sattler and Brandt (2008) argue that the existence of globalization restrictions does not remove responsibility from governments. Voters still make governments accountable for the policy decisions, even when they have no impact on outcomes, focusing again on what governments try to achieve, instead of what they end up achieving. As long as we understand that accepting the limitations of supranational arrangements is still a political decision, we can expect voters to hold parties accountable for this. Given that this tends to be a policy decision shared by mainstream parties, it is also reasonable to expect that this electoral reaction comes through anti-establishment attitudes and a backlash against conventional politics.

These results have important implications. They shed light on why governments in Europe have systematically lost elections in the aftermath of the Great Recession, despite the fact that their responses to the crisis were substantially constrained by supranational arrangements. Voters did not accept that governments were just bounded by the EU and could not implement their policy responses. The failure to do so was still penalized in the ballot box. Our results indicate that there is also a backlash against opposition mainstream parties, contributing to the understanding of some of the transformations of party systems in the aftermath of the Great Recession. The results can also be extended to understand the political consequences of some exogenous shocks, like the COVID-19 pandemic, where governments might not be directly responsible for its outbreak, but voters might still blame the national government for creating the conditions for them to be more impactful.

Another key implication of our experiment is that using supranational rules as a scapegoating strategy when economic performance is negative is *not* likely to work as conventionally expected in the literature (Hobolt and James, 2014). This blame-shifting strategy may fail because voters still expect that governments can shape those rules and deliver economic results. In addition, our paper also suggests that if there is a backlash against supranational constraints when economic performance is bad, we can expect that governments will increasingly place the international constraints in the center of the electoral agenda. This is consistent with the fact that elections in developed democracies are increasingly defined as a competition between anti-globalization and pro-globalization political alternatives (Hellwig, 2020). Further research should account for the conditions under which this backlash happens. Spain, as other Southern European countries, has been particularly affected by the supranational constraints. More research showing whether this backlash emerges only when the country has been through such a dramatic situation will allow to establish better predictions about the future of support for supranational integration.

Finally, while we have shown that the supranational constraints treatment *on average* erodes support for the incumbent, there may be relevant heterogeneous effects across groups. Indeed, some citizens favor the existence of supranational constraints because they tie the hand of irresponsible politicians. These voters are not likely to punish parties for the existence of explicit supranational rules. Further work shall explore individual-level sources of variation in responses to international constraints.

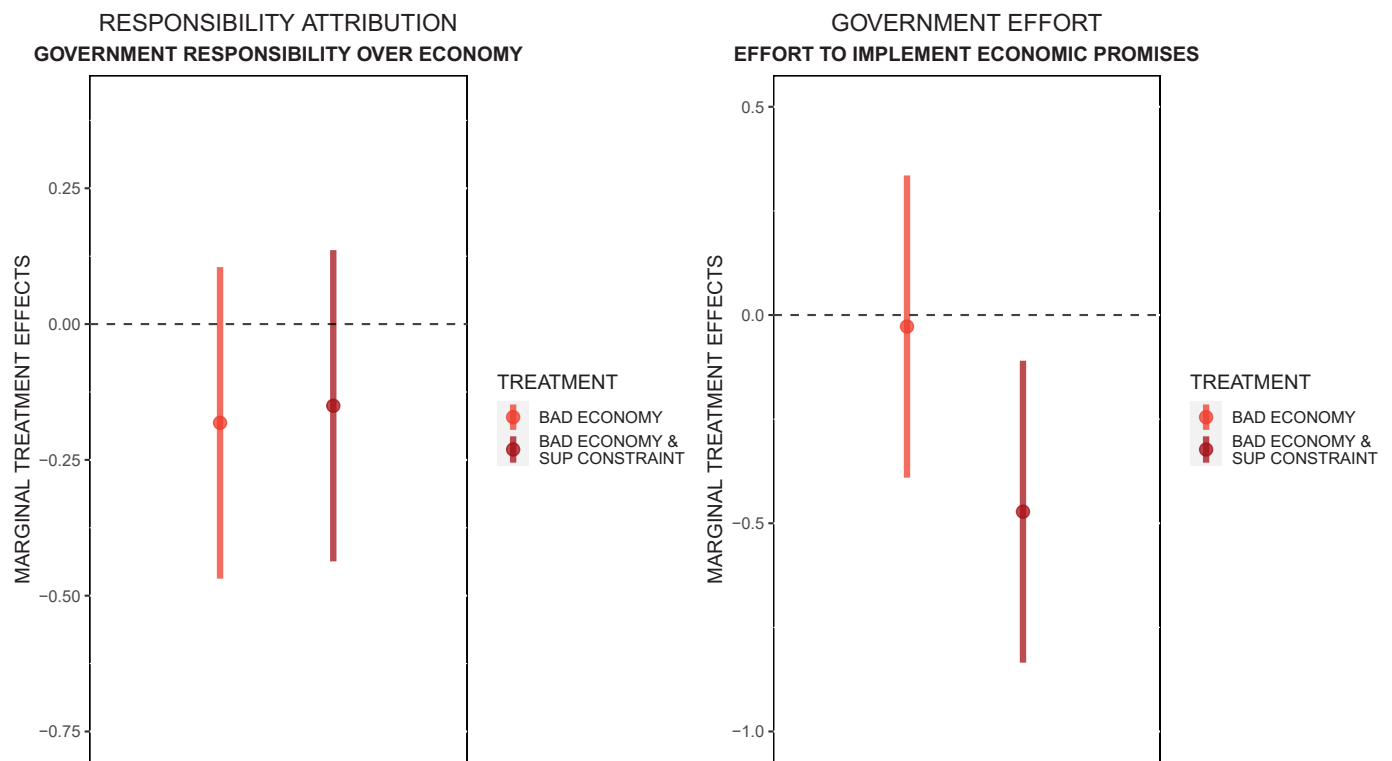


Fig. 5. Explanatory Mechanisms. Treatment effects and 95% CI. On the left panel, responsibility attribution over economic performance. On the right panel: Perceptions that the government has made a great effort to implement promised economic policies despite pressure from supranational institutions. Control group averages: 7.2 for responsibility attribution and 3.4 for government effort.

Data availability

Data for replication are publicly available at the Harvard Dataverse: <https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi:10.7910/DVN/ETHATW>

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Appendix A. Supplementary data

Supplementary data to this article can be found online at <https://doi.org/10.1016/j.electstud.2022.102530>.

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