Reform narratives and argumentative coupling in German pension policy: constructing the ‘deserving retiree’

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ABSTRACT

German pension policy experienced a shift in the early 2000s, when public pensions were cut back, the retirement age raised, and private, publicly subsidized pension provision stipulated. Within a coherent reform narrative, those reforms were grounded on arguments of a ‘demographic time bomb’, a no-longer-affordable public pension scheme, and the return potential of private pension funds. Yet this narrative was delegitimized quickly with zero-rate-policy, and increasing old-age poverty in a lean public pension scheme. In such a situation, it can be expected difficult to either adapt the old narrative or construct new ones. This makes an interesting case for this article to study reform narratives and argumentative coupling in recent German pension policy through two contrasting cases: A failed attempt at establishing a minimum-pension scheme; and a ‘successful’ reform package combining a ‘mothers’ pension’ and exceptions for a full pension at age 63. Findings illuminate how the contrasting success of those reform proposals can be understood in terms of narrative stories: The reform which – political-strategically – could build on the ‘deservingness’ of the target groups could be agreed upon comparatively easily. Possible beneficiaries of a minimum pension are of varying ‘deservingness’, though, and narrating a more ‘problem-solving’ story has proven difficult.

1. Introduction

During the 1990s, the German pension system came under pressure with demographic change and population ageing. Similar developments and narratives of a ‘pension time bomb’ have been described for other countries (Béland, 2019, in this Special Issue), but reform pressure in Germany was particularly pronounced, due to the nature of the pay-as-you-go system, as well as high unemployment and costs of reunification at the time. It has been well researched how retrenching the public pillar and promoting private provision emerged as ‘solutions’, and how this narrative was utilized by a powerful reform coalition for the far-reaching early 2000s reforms (Bönker, 2005; Friedrich, 2015; Hegelich, Knollmann, & Kuhlmann, 2011; Wehlau, 2009). However, with zero-interest-rate policy, low returns, and increasing old-age poverty in a lean public pension scheme, the reform narrative itself came

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under pressure. The paradigmatically new solutions (Lamping & Rüb, 2004; Schmähl, 2011) were, at least partly, reversed (Natali, 2018) and deconstructed again (Blum, 2019). Those more recent policy processes have received little research attention so far.

Against that backdrop, German pension policy makes an important case for studying the role of reform narratives: Those narratives (Stone, 2012) play a crucial role for constructing a ‘reform imperative’ (Cox, 2001): As Cox argued, political leaders need to frame issues in a path-shaping way, constructing the need to reform and therewith generating support for reforms and helping to overcome obstacles. This is particularly the case in pension policy, which as an old-social-risks area is dominated by retrenchment reforms (Blum & Kuhlmann, 2017, in this Special Issue), which are electoral risky and need to be communicated well towards relevant political actors and voters (König, 2016). Moreover, pension policy as such is highly important in electoral terms – due to population ageing even increasingly (Schmidt, 2014). And in the current context, as described above, the case of German pension policy is interesting in a further regard: In a situation, where such a crucial reform narrative as that employed for the early 2000s, path-breaking reforms is delegitimized so quickly, it can be expected difficult to either adapt this narrative or construct a new one.

This article studies two contrasting cases during the old narrative’s de-legitimization stage (2009–2017): A failed attempt at establishing a minimum-pension scheme; and a reform package combining an extension of the ‘mother’s pension’ and exceptions for a full pension at age 63, which could be agreed upon much more easily. The question is whether this contrast in the ‘success’ of the two reform attempts can be understood in terms of narratives. Methodologically, the analysis builds on qualitative content analysis of expert interviews, policy documents, and news articles. To study the social policy reform narratives (Blum & Kuhlmann, 2017; Stone, 2012) for the two selected cases, the article employs the concept of argumentative coupling (Blum, 2018). This analytical focus allows going deeper into the construction of reform narratives, and to investigate how reforms are argumentatively prepared. In the next section, this analytical framework of reform narratives and argumentative coupling will be developed, before Section 3 details the used methods and data. Section 4 presents the two case studies and Section 5 draws more general conclusions for studying the argumentative construction of reform narratives.

2. Reform narratives and argumentative coupling

2.1. Narratives of social policy reform

Stone’s (2012) book Policy Paradox, first published in 1988, and her work on narratives are amongst the milestone publications in policy research, particularly in the literature on problem definition. Stone (2012, p. 158) argues that problem definitions mostly show a narrative structure, and that narratives and causal stories are the ‘principal means for defining and contesting policy problems’. Essentially, she identifies four types of storylines (Stone, 2012, pp. 160–168) within stories-of-change as well as stories-of-power: While the first can be distinguished into the – partly co-existing or even intermingled – stories of decline and stories of rising, the stories of power to deal with a problem or not entail constructions of helplessness and control.
While, for a number of reasons, narrative stories can be expected to be of particular importance in the area of social policy, only few social policy publications have taken that perspective yet and, vice versa, the quite extensive literature on narratives has rarely dealt with social policy cases. Blum and Kuhlmann (7) in the conceptual introduction to this Special Issue argue that reform narratives in social policymaking can be expected to systematically differ on two dimensions, depending on whether the respective reform is expansionary or retrenching, and whether it concerns an old- or new-social-risks policy. Old-social-risks policies focus on the (monetary) compensation of ‘traditional’ life risks (such as unemployment or old age); new social risks (e.g. work–family balance, lone parenthood) are rooted in the transformation of the traditional male-breadwinner principle and the tertiarisation of employment (Bonoli, 2005).

Corresponding to the four respective types of social policy reform, different reform narratives are proposed (Table 1). Those narratives are specified by linking to Stone’s categories of ‘helplessness’ and ‘control’, as well as socially constructed target populations. Schneider and Ingram (1993) distinguish four such target groups: the advantaged (e.g. the elderly) are politically powerful and constructed as deserving, whereas dependents (e.g. mothers, children, poor families) are also seen as deserving but weak. Contenders (e.g. the rich) are powerful but undeserving, and finally, deviants (e.g. welfare cheats, illegal immigrants) are politically weak and constructed as undeserving. Both categories are crucial here since social policy reforms are essentially about granting or taking social rights (Ingram, Schneider, & DeLeon, 2007). Also, Stone (2012, p. 167) identifies the blame-the-victim story, where whole groups are constructed as undeserving, as a sub-type of stories-of-power: The power to control the situation is here shifted to the group, e.g. with ‘benefit scroungers’, who prefer not to search for a job and rather stay on welfare benefits, as they ‘find welfare yields higher returns’ (Stone, 2012, p. 212). Table 1 displays how the four cases of social policy reform can be expected to vary with regard to target populations and thereby to the reform narratives employed.

In short (see Blum & Kuhlmann, 7, for more details), expansionary old-social-risks policies can be expected to draw on the deservingness of affected groups, and acknowledgement (e.g. of their life’s work). This is particularly the case for pension policy, which addresses typical ‘advantaged’ (the elderly). The context is different for new-

| Table 1. Types of social policy reform narratives. |
|-----------------------------------------------|
| Context                                      | Expansory                      | Retrenching                          |
| Old-social-risks policies                     | (I) Stories of giving-to-give   | (III) Stories of taking-to-take or taking-to-control |
|                                             | ● Deservingness and acknowledgement (Advantaged) | ● Undeservingness and Self-Responsibility (Deviants, Contenders) |
| New-social-risks policies                     | (II) Stories of giving-to-shape | (IV) Stories of taking-to-take or taking-out-of-helplessness |
|                                             | ● Deservingness and empowerment (Dependents) | ● Undeservingness (Deviants, Contenders) |
|                                             |                                | ● Helplessness (Dependents)          |

Source: Blum and Kuhlmann 7

2The categories of ‘decline’ and ‘progress’ are less suited here, as ‘decline’ can be expected to have some relevance for narratives in all distinguished reform types (Schlaufer, 2018; Stone, 2012).
social-risks policies: The target populations here are primarily dependents (e.g. children, mothers), which helps explain why those policies (e.g. work–family balance) were traditionally underdeveloped in many welfare states. In the last two decades, and since these groups are seen as particularly deserving, efforts have been rising to ‘empower’ them and expand new-social-risks policies (e.g. following the principle of a Social-investment state). We can thus expect stories of giving-to-shape for the future. Different stories can be expected in case of retrenchment. Both for old- and new-social-risks policies, we can here expect undeservingness constructions for deviants and contenders as benefit recipients (e.g. excluding illegal immigrants or also ‘the rich’ from benefit access). While old-social-risks policies are somewhat set in a general context of decline (being described as costly and not affordable any longer), cutbacks should be particularly narrated by ‘helplessness’ constructions in case of advantaged target groups, who cannot be constructed as undeserving. Yet as those groups are powerful and traditional protégés of old-social-risks policies, it may at times be possible to shift control for the situation back to them (e.g. making private pension provision their self-responsibility). This is less feasible for cutbacks of new-social-risks policies, which have dependents as target groups: Since those groups are traditionally weak, they cannot take control and there should be even stronger helplessness constructions, shifting the blame to some (external) reform imperative.

2.2. Narratives and argumentative coupling

Narratives are particularly associated with the problem-definition literature, but they are as telling for policy design and formulation (see also Schlaifer, 2018). Stone (2012, p. 227) pays attention to their linkages with policy solutions, e.g. when describing how causal stories may be used as ‘mechanisms for linking a desired program to a problem that happens to be high on the agenda’. Also, Rochefort and Cobb (1994, p. 6) regard the ‘connection between the socially dominant understanding of a problem and the sorts of programmatic interventions deemed to be appropriate and reasonable’ as decisive. Narratives, as strategically employed by policymakers in the political process, are thus essentially means for constructing a certain problem understanding and linking it with a certain policy.

Narrative stories (Table 1) are used to construct such linkages between characters, problems, and solutions (Schlaifer, 2018). Yet the focus is usually on the ‘problem definition’ carried by a certain narrative, while studying narratives would benefit from paying closer attention to how the linkages from problem to solution are argumentatively achieved. Moreover, the literature indicates that narratives not only include problem and policy, but also political aspects. For instance, Copeland and Scott (2014, p. 3) highlight how narratives are strategically constructed to ‘mobilize political action around a perceived problem in order to legitimize a particular solution’. And ‘the social construction of the target group justifies the allocation of benefits or burdens to that group and, eventually, generates power and legitimation for the policy’ (Stucki, 2017, p. 414). That different target groups are more or less powerful is of central importance in the course of politics. By addressing those target groups as characters, stories may e.g. use motivational arguments (Dunn, 2012), which capture values, emotions, and political goals.
To understand how the linking operations within narratives are made, the concept of ‘argumentative coupling’ (Blum, 2018) can be additionally employed to study reform narratives. This concept is derived from an integration of the multiple-streams framework (Kingdon, 1995) with the forms and uses of knowledge described in the knowledge-utilization literature3 (see e.g. Amara, Ouimet, & Landry, 2004; Peters & Barker, 1993). Argumentative coupling denotes the linking of problem, policy, and political issues through arguments. From our perspective on reform narratives and the argumentative preparation of policy change, it is crucial to note that couplings do not only occur at times of open policy windows, when they can enable agenda-setting or even policy change. Rather, recently increasing attention has been paid to forms of ‘argumentative coupling’ (Blum, 2018) or also ‘coupling attempts’ (Dolan, 2019), i.e. to the many linkages between the streams that are made prior to the moment of final coupling. For a long time, this issue has been paid little attention, although it is already highlighted by Kingdon (1995, p. 229) when he writes: ‘Policy entrepreneurs anticipate political constraints as they develop proposals, for instance, or politicians seek the counsel of policy specialists as they work up campaign themes. Couplings are attempted often, and not just close to the time of final enactment.’ Those coupling attempts are used to persuade other actors and build strategic coalitions (Zittoun, 2014), and needed to ‘soften up’ a proposal within the policy community (Kingdon, 1995, p. 127).

Arguments can be woven together towards one narrative, and therefore enable investigating the argumentative construction of a ‘reform imperative’ (Cox, 2011) in concrete terms (see also Blum & Kuhlmann, 7). In particular, argumentative coupling provides insights into how reform narratives argumentatively achieve the linkage towards a certain proposal and the strategic function for coalition-building (Copeland & Scott, 2014; Rochefort & Cobb, 1994; Stone, 2012). Based on the knowledge-utilization literature, arguments may be based on one of the three different types of knowledge that can be used for policymaking, namely: problem, policy, and politics knowledge (Peters & Barker, 1993). If a certain type of knowledge is not linked to another issue type, but remains centred at the same level (problem, policy, or politics), this can be denoted a ‘non-coupling argument’ (Blum, 2018). For instance, a classical ‘problem analysis’ follows an enlightenment logic to gain more knowledge about a problem, but does not necessarily draw conclusions for policy. Respective arguments will be used within narratives as well, but essential are the ones which make linking operations and therewith construct a need of and way for political action.

Drawing on the idea of argumentative coupling shows that the different narrative elements (characters, problems, solutions) can be linked in very different ways. The corresponding logics of the linking operations (Table 2) are either consequential (problem-based), doctrinal (policy-based), or political (politics-based).4 Employing a consequential argumentation logic, knowledge about a certain problem (e.g. demographic change) is used to make inferences for policies (e.g. how to design a certain

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3This literature distinguishes different types of knowledge (problem, policy, and politics) and different uses for policymaking. Instrumental use denotes rather direct application of knowledge for policy interventions and alternatives, whereas conceptual use is less direct, more long term, and rather directed at general enlightenment (Amara et al., 2004). Political knowledge use includes strategic and symbolic functions, such as legitimization.

4These terms draw on Zahariadis’ (2003) distinction of possible coupling logics in the MSF: Problem windows encourage consequential coupling, where a solution is searched for the problem. Politics windows are believed to encourage doctrinal coupling, where what matters most is adopting the solution (Zahariadis, 2003, p. 139).
pension reform) or political use (e.g. consequences for the composition of voter groups). This corresponds to classical problem-solving. For a doctrinal argumentative-coupling logic, policy knowledge forms the starting point. It can be linked to problem issues, which reverses the problems-solving- into a garbage-can-logic. Or it can be linked to political issues, e.g. arguing how a certain policy is supported by voter groups. Political argumentative couplings take this strategic orientation one step further, by that here politics knowledge becomes the starting point to sell or stall (problem or policy) ideas (Blum, 2018). For instance, the support by a certain target group (‘this is what people want’) can be used to construct an imperative for policy reform.

Regarding the social policy reform narratives (Table 1), it seems unlikely that these can only employ a certain argumentative-coupling logic and exclude others, yet we may well assume a varying importance. There may be some scope for problem-solving across all reform types, but consequential logics could be expected particularly suitable for stories-of-giving-to-shape, where target groups are typically weak but positively constructed, so their problems receive attention. By contrast, it could be investigated whether political argumentative-coupling logics are particularly relevant for stories of giving-to-give, where advantaged groups receive what is otherwise deemed difficult (namely expansion of old-social-risks policies). Retrenchment reforms could, more than expansion, be expected to be grounded in consequential to doctrinal ways for ‘deserving’ groups, and in rather doctrinal to political ways for ‘undeserving’ groups (i.e. arguing for cutbacks ‘because they don’t deserve it’). While recent political science research has investigated arguments to study narratives and also the political construction of target groups (Schlaufer, 2018; Stucki, 2017), investigating the argumentative couplings (Blum, 2018) of reform narratives will allow to investigate more closely how they achieve certain problem-policy-linkages which form a crucial element and strategic task of narratives (Stone, 2012). Argumentative coupling also allows for a systematic investigation of linkages from and to political issues, including the idea that the whole reasoning of a linking operation may be politics-based.

### 3. Research design

German pension policy can be considered an important case for studying narratives and argumentative coupling. Paradigmatically new solutions were implemented in that area in the early 2000s, which – during the investigated period (2009–2017) – came under pressure for several reasons (Section 4.1) and even led to partial policy reversal (Natali, 2018). The investigated period is thus particularly prone to study re-definition of narratives and the argumentative construction of new reform narratives. Furthermore, it includes two
different government coalitions, with conservative CDU/CSU first forming a coalition with liberal FDP (2009–2013) and then with social-democratic SPD (2013–2017). Pension policy is also an interesting field to study since, given its relevance in electoral terms (Schmidt, 2014), particularly in face of population ageing and a higher voter turnout of older age groups, political-strategic considerations may be expected to be particularly important in argumentative couplings and reform narratives here. In addition to some smaller modifications or regulations for specific groups, there were two major reform debates between years 2009 and 2017. One was the pension-reform package 2014, which introduced expansions to the ‘mother’s pension’ and exceptional cases to receive a full pension at age 63. The other was a – failed – attempt to introduce a minimum-pension scheme. The next section presents results from those two contrasting case studies.

In face of the conceptual interest and approach, it is necessary to study the argumentative use of language (Zittoun, 2014, p. 52 ff.; Rochefort & Cobb, 1994, p. 9). Policy stories and narratives, which provide explanation, are crucial in this regard, but also the use of synecdoche or metaphors (Stone, 2012). Then again, narratives are woven together through arguments (Stone, 2012), which give meaning to a particular public policy, and are, essentially, about the utilization, construction, and institutionalization of knowledge (Zittoun, 2014, p. 73). Data to study these phenomena were collected through 11 ethnographic interviews conducted in 2015 (Table A1, Appendix). Ethnographic interviews (Spradley, 1979) are more formal than friendly conversations led during field research, but less formal than other types of qualitative (semi-structured) interviews. They are directed at ethnographic questions, views and everyday practices of the informants (Spradley, 1979, p. 59), which particularly allows for capturing interviewees’ narratives and their interpretation of others’ narratives. Interview partners included six ministerial officials, four researchers and one interest group representative. First, argumentative-coupling and softening-up processes can be expected to include a broad range of actors, including scientific experts (Blum, 2018). Second, perspectives from those different actor groups can help to explore the consequential, doctrinal, or political argumentative-coupling logics employed (see Table 2). Namely, as researchers by trend can be expected to be more driven by problem-solving reasoning, this can help to contrast with political-strategic constructions much more relevant for policymakers. The interview data were transcribed and – by help of the software Atlas.ti – analyzed through qualitative content analysis and looking for emerging themes. Additionally, policy documents (parliamentary protocols, law texts, etc.) and news coverage of the policy processes was included. To retrieve the news articles, a search for the terms of the reform proposals for the investigated period was conducted at the quality news website Spiegel online, which as a news portal comes second place in Germany in terms of users, following the Bild tabloid’s one. The articles were then controlled for relevance regarding reform narratives. Other news articles were included when identified as relevant in the reconstruction of the policy process (e.g. launching of reform proposal in a newspaper interview).

5Those were Mütterrente, Rente mit 63 and the different terms of the main minimum-pension proposals (Zuschussrente, Solidarrente, Lebensleistungsrente, solidarische Lebensleistungsrente, Grundrente).
4. The argumentative construction of reform narratives in German pension policy

In the following section, the (at least partial) deconstruction of the early 2000s reform narratives will be shortly depicted. This provides the background context for the case studies of the pension reform package 2014 (Section 4.2) and the minimum-pension proposals (Section 4.3).

4.1. The public-private shift: deconstruction of a taking-to-control reform narrative

Traditionally, the German pension system mainly rested on the public pension pillar, which – based on social-insurance contributions – used to be directed at maintaining the standard of living during old age. Those main features were basically kept until the new millennium (Bridgen & Meyer, 2014). Similar to other countries (Béland, 2019; Hagelund & Grodem, 2019, both in this Special Issue), however, during the 1990s Germany’s public pension system came increasingly under reform pressure in face of population ageing, high unemployment rates, and the financial burden of reunification. Germany’s first governing coalition of Social democrats (SPD) and Green party (1998–2005), in a broader party consensus (Friedrich, 2015), then initiated a path of social policy and pension policy reform, which has been rated as paradigmatic (Lamping & Rüb, 2004; Schmähl, 2011): In essence, the changes involved a public-private shift, by which public pensions were cut back and the legal retirement age\(^6\) successively raised, while private provision (with the so-called Riester-pension\(^7\)) was stipulated and publicly subsidized.

The reform narrative of the time was one of taking-to-control and worked in a twofold way. First, demographic change was used as the primary argument for cutting back public pensions and strengthening private arrangements (Hegelich et al., 2011), drawing a looming story of decline and helplessness, whereby with population ageing public pensions in their current form were just not affordable any longer and made the ’drastic reduction’ of public pension spending ‘without alternative’ (Wehlau, 2009, p. 188; see also Friedrich, 2015). There also was an argumentative coupling from this ‘demographic time bomb’ narrative (Wehlau, 2009, p. 264) to a second policy element, namely the private pension schemes as ‘solution’ and their general achievement potential. The ground for this story had been prepared by some prominent policy entrepreneurs (Bönker, 2005) and, not least, the financial sector with its vested interest in expanding private provision (Wehlau, 2009). It turned the ’looming decline’ towards a story of progress, stressing the return potential of private pensions (e.g. through share-based funds) and even potential positive impulses the additional capital-market stock could give to financial markets (Wehlau, 2009). The ‘multi-pillar pension system’ advocated by the World Bank gave a nice metaphor within this narrative to depict how one of the three pillars had got fragile; thus, the other two needed to be strengthened (Die Welt, 1998). The following quote from Riester, then Minister of Labour (SPD), shows how cuts for present

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\(^6\)This gradual increase of retirement from age 65 to 67 was only conducted later in 2007, by the grand coalition of CDU, CSU, and SPD (2005–2009).

\(^7\)The Riester-pension, named after the chairman of the commission that developed the reform proposal (SPD-Minister of Labour and Social Affairs 1998–2002) was introduced in 2002. It is a voluntary private, fully funded pension savings scheme, operated by insurance companies and banks, but with public subsidies.
pensioners (advantaged) were connected with future pensioners (dependents of today). In a typical taking-to-control story (see Table 1), parts of the power to control the situation is shifted to present pensioners, by being ‘solidary’ and making up for public cuts through their private provision:

Concerning solutions, we are first of all concerned with finding a fair balance between the generations. This is our way and we believe it is the only possible way. We put forward a solution that lives up to this goal. […] We create generational justice; we put emphasis on solidarity with gains, as well as on security and affordability.⁸ (German Bundestag, 2000)

Around 2008, a turning point can be identified for German pension policy and the argumentative settings. Despite the unexpected (but rather momentary) prosperity (Blum & Kuhlmann, 2016) of the German economy and also the pension insurance, a beginning debate on old-age poverty followed hard (Hegelich et al., 2011; Schmidt, 2014). Not least, the – especially future – problem of old-age poverty was ascribed to the early 2000s pension reforms, as those had reduced public pension levels and made the private provision quasi-compulsory, but not affordable for all. Moreover, the private saving schemes with their dependence on capital-market developments came under pressure in times of zero-rate interest policy and low returns of insurance companies (Natali, 2018; Schmähl, 2011); as early as 2004, the SPD, e.g. had already departed from its enthusiasm for the private pension (Friedrich, 2015). The following quote from an interview with a ministerial official exemplifies this:

Riester [subsidized private pensions] came at a time when there was a kind-of gold-rush mood in the financial sector: We can do everything, we will do everything, we tinker the greatest products. We earn money with it, but it’s also good for the insurants. […] And a lot of criticism came up. Thus, in the current political discussion Riester is very much on the defensive. I don’t know anyone right now in politics who would say: ‘Riester is great.’ That’s a no-go. (Interview 1)

In conceptual terms, the former narrative could less and less serve its legitimizing function (see also Nullmeier, 2015), and was argumentatively deconstructed (Blum, 2019). Whereas retrenchment had been the first and foremost reform option being discussed for public pensions for many years, now its expansion became a relevant alternative again within the policy community (see e.g. Blank, 2017). At the same time, strong doubts remained whether significantly expanding public pensions could indeed be a credible reform option, and whether a respective reform narrative could be argumentatively constructed (see Interview 2), also taking into account that a ‘serious mistake would have to be confessed with such a move’ (Meyer, 2015; own translation). This context is promising for studying varying argumentative couplings in the narrative stories of two contrasting reform processes.

### 4.2. The pension-reform package 2014: a political story of giving-to-give

To understand the background of the pension-reform package 2014, not only the fundamental pension policy transformations of the early 2000s need to be taken into account, but also the paradigmatic family policy changes from a few years later, particularly with the introduction of an income-dependent parental benefit and the

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⁸All quotes from interviews, documents and newspapers throughout this article are own translations.
right to a childcare place from the age of 1 year (Blum & Kuhlmann, 2016). These reforms were pushed through by family minister von der Leyen (CDU) partly in resistance to her own party, and particularly conservative CSU. The reforms could only be ‘bought’ by complying with the CSU’s demand for a cash-for-care benefit (Betreuungsgeld; meanwhile abolished again due to a Federal Constitutional Court decision), but in exchange to this, the CDU-women demanded improvements of a so-called Mütterrente (mother’s pension). This was a new label for a change in an old measure, namely the childrearing credits in the pension insurance: Due to an existing cut-off point, mothers of children born until 1991 could only assert a childrearing period of 1 year in their public pension, while mothers of children born from 1992 could assert up to 3 years. While the CDU agreed on ‘step-wise improvements’ for the mothers’ pension at its party convention in December 2012, it was the CSU which then became particularly engaged with the policy and threatened to block the minimum pension (Section 4.3) if it was not introduced (Spiegel online, 2012).

In fact, the improvements of the childrearing credits (since end 2012 labelled more fashionable as mothers’ pension) had been developed as proposals since several years, particularly by the CDU-women. For spinning a reform narrative, the policy was now argumentatively coupled with two issues. First, it was linked in a rather doctrinal logic (see Table 2) with the ‘deservingness’ of the mothers, branding the cut-off point for children born before 1992 as ‘unjust’. As Kramp-Karrenbauer, then federal state premier of the Saarland, put this:

The mothers’ pensions are moving the soul of the CDU. […] Back then, they said for financial reasons, we distinguish between the children: For children born after 1992, there are three pension points, for those born before only one. That was completely arbitrary. And that’s why the CDU decided already twice at party conventions to end this injustice. Now we finally have to do it. (Die Welt, 2012)

Second, the proposal was now also argumentatively linked with the increasing discussion on old-age poverty, therewith drawing a story of decline. For instance, Bavarian social minister Haderthauer said: ‘Childrearing is the main reason for old-age poverty. As long as nothing happens here, the CSU will not accept the extra-payment pension’ (Spiegel online, 2012). To a certain extent, even a story of progress was told for this expansionary proposal, as, e.g. the CDU/CSU (2013) election program proposed the mother’s pensions as a reward ‘made possible by the good financial situation of the pension insurance’.

In early 2013, there were strong internal debates in CDU and CSU about the pension policy plans, but they were particularly opposed by FDP (Schmidt, 2014). Also due to the liberal coalition partner, CDU and CSU when settling their differences over the mothers’ pension decided to set aside any changes in the ongoing legislative period and keep the proposal for the upcoming campaign for the September 2013 general elections (Spiegel online, 2013). In the following months, many critical voices were raised against the mothers’ pension (e.g. by employer organizations, trade unions, and the pension insurance). In parallel, however, the SPD had, in November 2012, announced new pension policy plans, amongst them a full pension at age 63 for people with 45 insurance years

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9All female members of CDU are usually member in the Frauen Union (CDU-women).
(including periods of education or childrearing). In the following coupling argument, then SPD-leader Gabriel draws on the narrative of a nurse to advocate the policy:

I don’t know any nurse who can still lift patients at age 67. […] They don’t exist, since their job is so demanding that most don’t even hold out to 65. That’s why our demand is right that employees should have a full pension after 45 insurance years at age 63. (FAZ, 2012)

After general elections, a political compromise was then enabled in coalition negotiations (CDU, CSU & SPD, 2013), and both the mothers’ pension and the pension at age 63 were introduced in 2014. Regarding both policies, an interview partner identified a political argumentative-coupling logic (see Table 2), where political-strategic considerations came first and led to the adoption of the solutions:

There was no scientific basis, for neither of the two [reforms]. One can say: ‘I want to reward mothers’ efforts to raise children more strongly, of parents who had their children before 1992.’ That’s purely political. Of course one can argue that it’s unjust from a distributional perspective that those mothers get less than mothers who had their children later – but those are not the real questions. […] It’s a purely political decision. And the same holds for the SPD-demand for a pension for long-term insured at age 63, where they also said: ‘We have to do something for our clientele.’ (Interview 1; see also Interviews 2, 9)

After the unpopular pension policy decisions – namely: cutting back public pensions and increasing pensionable age – the SPD had suffered dramatically at elections. The pension at age 63 was thus a ‘course correction’ the SPD advocated to approach again its core clientele and the trade unions (Hinrichs, 2017). Correspondingly, the reform narrative was a story of giving-to-give, mainly drawing on the deservingness of the groups, as an interviewed policymaker summarized:

Now, with this mother’s pension, this has grown over years. That also the mothers said: ‘I really deserve this money.’ There are also other of exactly such developments, where one says: ‘Look, we have to do this differently. We have to, ok, take something from someone. Not nice, we understand this. But they really deserve it more now!’ (Interview 5)

To a certain extent, mothers (i.e. typical dependents in terms of Schneider & Ingram, 1993) were addressed here with the new social risk of not having sufficient pensions due to care work. What is crucial, though, is that they are also ‘mother pensioners’, and therewith an advantaged group – especially as the measure is not geared at fighting old-age poverty (e.g. through targeted benefits). Also, the ‘pension at age 63’ is seen as ‘political rearguard action’ (Interview 4), ‘giving something to the people after all the rascality that had been done’ (Interview 1), and against that backdrop rather telling a story of giving-to-give. To a certain extent, there were also consequential argumentative couplings, by linking with old-age poverty problems. This however remained rather superficial, since policy considerations came first, and the main argumentative-coupling style was doctrinal, involving political reasoning as well. Drawing on the deservingness of the groups mainly benefiting from the measure (mothers of pension age and skilled workers) also ‘sufficed’ as a reform narrative, given how deserving and electorally important these groups are (Ingram et al., 2007). While they were contended, the reforms are thus also not seen as fundamental changes (Interviews 7, 9), and also ‘not really solving any of the problems’ (Interview 4), i.e. lacking consequential coupling.
4.3. The minimum pension: difficulties to construct a consequential reform narrative

Over the past years, different proposals for a minimum-pension scheme have been developed, including labels (Zittoun, 2014) such as the CDU’s extra-payment pension (Zuschussrente), the Green’s guarantee pension (Garantierente), the SPD’s solidarity pension (Solidarrente), and the Left’s solidarity minimum pension (solidarische Mindestrente). What those different proposals share is the idea of introducing a base level in public pensions for certain groups, to be covered through tax-financed extra-payments in the fight of old-age poverty.

The agenda-setting of a minimum-pension idea, based on the coalition treaty from 2009–2010, was done by von der Leyen (CDU, Minister for Labour and Social Affairs 2009–2013), who proposed her extra-payment pension in September 2011. Taking up an earlier idea developed within her party (Diehr, 2018), she proposed:

Low-income earners, who have worked their whole life, often not manage to acquire a pension above the basic social-security level. They are treated the same way as someone who never worked or took private provisions. That’s unfair. […] People who worked their whole life, paid contributions, raised children, cared, and made private provisions will receive a pension above this level, namely 850 euro per month. (Die Zeit, 2011)

In this reform narrative, those ‘who never worked’ are constructed as deviants, and those ‘who never took private provisions’ as having not taken up their power to control the situation, and thereby having lost their deservingness. Hard-working and caring low-income earners, on the contrary, are constructed as deserving and their problem of low pensions is argumentatively linked to advocate the policy proposal. Gabriel, then SPD-leader, accused von der Leyen of not proceeding in a consequential, problem-solving way, and not even taking the ‘real problem’ into account:

Ms von der Leyen is currently preparing a real pension lie. She claims she wants to do something against old-age poverty. Sounds good, but doesn’t solve the problem. She’s blind and ignorant of the reasons for old-age poverty. (Spiegel online, 2011)

With this, an argumentative struggle becomes visible over the underlying problem and its corresponding linkage to a minimum pension as solution. Moreover, those arguments were made at a time when old-age poverty was not seen as an immediate problem, as e.g. stated in a ministry report (BMAS (Federal Ministry for Labour and Social Affairs), 2013, p. 296). An interview partner called the problem pressure ‘super-relaxed’, highlighting though that ‘this is soon going to change again’ (Interview 1). The problem was not sufficiently defined or seen as imminent (Diehr, 2018).

The proposal quickly came under quite heavy attack, e.g. by the German pension insurance due to its unclear financing status (tax- or contribution-based), and by others due to its high hurdles foreseen (45 insurance years, 35 contribution years and private provision, Riester or occupational), i.e. doubts were raised over its technical and financial feasibility (Kingdon, 1995). In March 2012, von der Leyen made a new advance with an adapted concept (lower hurdles, but also lower benefit, no longer flat-
rate but equivalent to paid contributions). The draft law followed in August 2012, but the proposal met opposition from coalition partner FDP and also from within CDU/CSU. Von der Leyen’s attempt to ‘trade’ it against the abolishment of consultation fees at doctor’s offices failed: For instance, CDU’s health policy spokesman Spahn defined the extra-payment pension as ‘regulatory blunder’ and ‘fatal for the young generation’ (Spiegel online, 2012). The minister linked it strongly to problem indicators\(^{11}\), to political-strategic considerations and her own political fate by stating: ‘The people must not lose their trust into the system. […] If we don’t manage to introduce it, the pension system is losing its moral grounds. As a minister, I cannot watch this happen, and I won’t’ (Berliner Morgenpost, 2012). As von der Leyen stated in another interview, she believed that the extra-payment pension was one of the ‘topics that are ripe and learn how to fly almost on their own’ (Süddeutsche Zeitung, 2012). However, the political context was unfavourable and the reform narrative’s argumentative coupling not sufficiently developed. Consequently, attempts to introduce the measure under the conservative-liberal government failed, although it had been agreed upon by a coalition summit in November 2012. Interestingly, it was now also re-labelled into ‘life’s work pension’, which gives a good example of how – as part of the argumentative-coupling process – a new label is given in an attempt to impose (better) meaning to the measure (Zittoun, 2014).

Already in September 2012, the SPD had brought an own preliminary concept for a solidarity pension into the debate, paid from taxes and guaranteeing 850 euros monthly for those who worked full-time for 40 years, and for low-income earners or long-term unemployed who paid contributions for 30 years (Spiegel online, 2012). In contrast to the life’s work pension, this proposal was more accepted within the party (Diehr, 2018). In the run-up to the 2013 elections, von der Leyen then pushed her ‘pet proposal’ of (now) life’s work pension, and the SPD its solidarity pension. Both policies were (even by name) merged in the coalition treaty into a ‘solidary life’s work pension’ under the heading ‘fighting old-age poverty’:

We want life’s work and many years of contributions into the social insurances to pay out. That’s why we will introduce a solidary life’s work pension. Introduction is expected until 2017. The principle is: Who was insured in the public pension insurance for many years, paid contributions (40 years) and still acquires less than 30 pension points for old-age income (means-test), shall benefit from an upgrade. Low-income earners, those who care for relatives or raise children will particularly benefit from this. (CDU, CSU & SPD, 2013, p. 73)

The solidary life’s work pension was made subject to financing conditions, though, and put into cold storage. Also, experts interviewed in 2015 doubted that it would still be implemented in the ongoing legislative period (Interview 7), given that the reform narrative was highly contested and that it was still politically unviable (Diehr, 2018). Moreover, policy entrepreneur von der Leyen (who could potentially have been in a better position to win support within CDU/CSU) had been replaced as responsible minister by Nahles (SPD). In spring 2016, Nahles set off to finalize the draft law for the

\(^{11}\) Von der Leyen started a campaign in the most popular Sunday newspaper (BILD), presenting new numbers calculated in her ministry, according to which every third employee was in danger of receiving a pension below basic social-security of 688 euros. The header ran ‘Who earns less than 2,500 euros today is threatened by old-age poverty. The shocking new pension-numbers’ (Bild am Sonntag, 2012).
solidary life’s work pension, but the opposition from interest groups and from within CDU and CSU was still strong, particularly pointing out that such a minimum pension would ‘destroy the achievement principle’ and that it could not be financed, given how expensive the pension-reform package 2014 had already been (Spiegel online, 2016). Nahles announced to develop a more comprehensive pension concept in the fight against old-age poverty, which she finally presented in November 2016. Regarding the life’s work pension, the concept foresaw ‘evaluating different models’; so overall it was rather aimed at the upcoming 2017 election campaign (where the SPD returned to a more generous solution under the label ‘solidarity pension’) than at still reaching a compromise with the coalition partner. The policy then re-made it into the new grand coalition’s agreement in early 2018 under the new label ‘basic pension’ (Grundrente).

To conclude, models for a minimum pension were continuously debated between 2009 and 2017, they were foreseen in two coalition treaties under different government constellations. Parties’ proposals were different, but not so different that this could easily explain how all attempts at introduction failed. As one interview partner put it: ‘The former minister [von der Leyen] indeed showed that there is a need for action in pension policy. With the concept of the life’s work pension, which, however, was politically unviable at the time.’ (Interview 1) As described here, von der Leyen’s reform narrative and argumentative couplings contributed to problem definition and the (but not yet sufficient) softening-up of the issue. Connecting back to the different types of reform narratives (Table 1), however, the crucial point is that such a minimum pension would need to bridge between different target groups, and narrative strategies were also changing between a story of giving-to-give (addressing old-age poverty) in this classical old-social-risks field, but also partly narrating the minimum-pension scheme in terms of a new-social-risk policy focused on particularly affected groups (i.e. related to transformation of working lives). Moreover, while consequential argumentative couplings were continuously developed and tested, they did not manage yet to link successfully with political-strategic issues and establish a coherent reform narrative.

5. Conclusions

Between 2009 and 2017, German pension policy unfolds as a case where the strong reform narrative of the early 2000s, which was told within a paradigmatic public-pension shift, was partly deconstructed again and attempts at argumentatively constructing new narratives were made. By some interviewees, a ‘vacuum of action’ (Interview 4) was identified in pension policy around 2015. However, two important and contrasting cases of reform processes were analyzed in this article. The first was the pension-reform package of 2014, which improved the mother’s pension and options to receive a full pension at age 63. This reform has been rated a partial reversal of German pension policy (Natali, 2018). The second was the failed attempt at introducing some form of minimum-pension scheme in two successive legislative periods. Especially in the second period, it was noticeable how the grand coalition quickly implemented the

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12 In face of the SPD’s strong negotiation position after the failed attempt to build a coalition of CDU, CSU, FDP and Greens, the agreement comes close to the solidarity pension from the SPD’s campaign: ‘To reward life’s work and fight old-age poverty, we will introduce a basic pension of 10 per cent above the social-security base for all who worked their whole life, including periods of (child-)care.’ (CDU, CSU & SPD, 2018, pp. 13–14).
pension-reform package in 2014, while the ‘solidary life’s work pension’ was made subject to financing conditions and put into cold storage. Opponents of the minimum pension argued that it could not be financed given how expensive the reform package 2014 had already been: thereby, both reforms were explicitly weighed against each other. Can this contrast in the ‘success’ of those two reform attempts be understood in terms of narratives and argumentative coupling?

The reform narrative for the pension-reform package of 2014 mainly focused on the deservingness of the groups. After the taking-to-control narratives of the early 2000s pension reforms, this meant a reversal to giving-to-give reform narratives. The success of the mothers’ pension may partly be explained by that it can employ both a story of giving-to-give and of giving-to-shape (see Table 1): Although mothers who do care work are typical dependents (Schneider & Ingram, 1993), they can also be addressed as (mother) pensioners (and thereby an important voter group), given that the benefit is paid independent of the income situation. Taking the additional perspective of argumentative couplings showed how this proceeded in a doctrinal and even political way: Both parties had an interest in ‘giving something back’ to their core voter groups after the retrenchment reforms – the CDU/CSU to mothers of pension age, and especially the SPD after its electoral losses to skilled workers ‘who have worked hard their whole life’. It was thus key for the coherence of the narrative how its respective characters were defined (in particular ‘the mothers’). Given the deservingness of the affected groups and their electoral importance, it seemed to ‘suffice’ for the narrative to focus on this story of ‘they just deserve it’, while any problem-solving argumentative couplings (i.e. to old-age poverty) were only superficially made. Even in the political realm, there was in fact quite large agreement that those reforms did ‘not really solve any of the problems’ (Interview 4).

In case of the (failed) minimum pension proposals, the political dimension of the narrative’s argumentative coupling seemed underdeveloped, but the narrative’s problem-policy coupling proved difficult, too. First, because the problem was not sufficiently defined at the time and old-age poverty was seen as a likely future, but not imminent problem (Diehr, 2018). Second, since the policy itself was contested and repeatedly redefined in attempts to construct a stronger reform imperative (Cox, 2001). This can also be understood in terms of narrative stories, and that possible beneficiaries of a minimum-pension scheme as a group are heterogeneous and of varying, contested deservingness (Blum & Kuhlmann, 2019; Ingram et al., 2007): For instance, mothers who worked less due to child-rearing tasks are typically viewed as deserving, while people receiving low pensions due to unemployment spells can even be constructed as undeserving deviants. While governing and opposition parties had similar proposals for minimum pensions, they diverged on who should be included or excluded, e.g. what should separate ‘deserving’ from ‘undeserving’ retirees in terms of contribution years or having made private provisions. In face of the different target groups, narrative strategies were also changing between addressing the minimum pension as an old-social-risks policy (‘social protection for old age’) or new-social-risks policy (i.e. related to transformation of working lives, etc.). In that sense, couplings remained partial (Dolan, 2019) and it proved more difficult to construct a coherent narrative linking between, problem, policy, and political issues.

While trust in private provision dissolved and that in the first pillar rose again (Interviews 5, 7), it proved difficult to narrate the ‘old story’ of strong public pensions and their expansion, and thus confess a ‘serious mistake’ (Meyer, 2015). As one
interview partner put it, ‘there is the insight that those Riester-products are not attractive, but there is no new paradigm yet, there is no political answer to this problem’ (Interview 2). Interestingly, this problem also showed in experts’ and interest groups’ assessment of the 2014 reform package (which was shattering), but it did not seem to affect the political narrative to implement the reform. While the future of a minimum pension in Germany will depend on a strong reform narrative establishing a problem-policy coupling, in cases such as the (politically driven) reform package 2014, it seems sufficient to tell a story of: ‘They just deserve it’.

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## Appendix

Table A1. List of interviews.

| No. | Interview partner (type)               | Institutional affiliation       | Date              | Length (in hours) |
|-----|----------------------------------------|---------------------------------|-------------------|-------------------|
| 1   | Ministerial official                   | Federal ministry                | 21 April 2015     | 1.21              |
| 2   | Ministerial official                   | Pension insurance               | 22 April 2015     | 1.24              |
| 3   | Ministerial official                   | Federal ministry                | 22 April 2015     | 1.10              |
| 4   | Researcher                             | Departmental research           | 23 April 2015     | 1.06              |
| 5   | Ministerial official                   | Pension insurance               | 23 April 2015     | 0.50              |
| 6   | Researcher                             | Non-university research institute| 8 June 2015       | 1.21              |
| 7   | Ministerial official                   | Federal ministry                | 8 June 2015       | 1.31              |
| 8   | Ministerial official                   | Federal ministry                | 22 June 2015      | 1.11              |
| 9   | Researcher                             | International organisation      | 9 July 2015       | 1.07              |
| 10  | Researcher                             | University                       | 15 September 2015 | 1.05              |
| 11  | Interest group representative          | Interest group                  | 2 November 2015   | 1.23              |