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Lilla TÓTH, György LENGYEL and Borbála GÖNCZ

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HISTORY WRITTEN BY THE LOSERS? SMALL PARTIES IN EUROPEAN GOVERNMENTS 1990–2019

Piotr SULA¹

This paper seeks to identify the determinants of the successes (government entry) of small political parties in 21 European states. Although the term small party is used quite regularly the borders between small, medium or large parties are not precisely delineated. To overcome this problem, I propose an original mathematical formula to select the group of 26 small parties based on the same criteria in 21 European states. Having this sample, I analyse all coalition cabinets to which these parties were invited as the junior partners. The main goal in this paper is to explain the causes of these parties' presence in the governments and explore the determinants of the portfolio allocations by combining quantitative (i.e. Banzhaf Power Index) and qualitative (ideological distance) measures. Some of the conclusions confirm previous findings (disproportional portfolio allocation which favours small parties) and some only partially overlap with the conclusions drawn in the previous studies (the relation between the number of potential/ alternative collaborators and the likelihood that the small party becomes the coalition member). This study deals with the cases from Central and East European States, and Western Europe.

Key words: small parties; government representation; European states.

1 INTRODUCTION

As it was shown in previous studies most of governments in the world under parliamentarianism (53.8%) had the status of coalition (Cheibub, Przeworski and Saiegh 2004, 573–574); it refers also to European governments, in both Eastern and Western part (Bergman, Ilonszki and Müller 2019, 538; Bergman, Hanna and Johan 2021, 694). It means that parties differing in ideology, but also in size, are involved in forming government coalitions. Obviously, small parties are analysed less frequently than their larger counterparts; it stems from the relative importance of the former and latter ones for political systems. However, it can be said, as I suggested in the title of this paper, probably paraphrasing Winston Churchill, that also small also parties seem to be relevant to political

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systems, particularly if coalition governments are being formed, which is the case of majority of governments, as mentioned above. The benefits they obtain from coalition negotiations are sometimes disproportionately high, which is why they are then called kingmakers (Evans 2020, 490; Klingemann and Volkens 1992, 191; Strom and Leipart 1992, 79; Sula 2021, 774).

The percentage of parliamentary seats controlled by an individual party is one of the most significant determinants of political parties' governmental relevancy. However, this was not the trigger point for political parties' unification. Conversely, the proliferation of small parties can be observed in European democracies. Furthermore, they demonstrated their significance not only at the parliamentary level but at the governmental one – in 27 European states since 1990 approximately 30 % of governments have been created with the support of small parties. Interestingly, the governmental representation of these parties was proportionally higher than their seat shares in the parliament and their potential measured with the Banzhaf power index. Therefore, it leads to the simple conclusion that coalition potential of political parties derives not only from arithmetical strength but from political context.

In this paper, I will present 26 small parties' performance at the governmental level in 21 European states trying to find out firstly what determines the entrance of small parties to the coalition government and secondly which of these independent variables (seat share controlled by small parties, Banzhaf power index, the position of the party on the left-right scale, the distance between senior and junior coalition party and the number of alternative coalition partners) affect the government position percentage. The spillover of studying small parties' performance would also be the presentation of the original mathematical formula which was used for creating a sample. It can be argued that utilising this formula was the only way to define "smallness".

Being concentrated on the small parties on the parliamentary and governmental levels I will not refer to the numerous studies dedicated to the small parties in the electoral process. However, I will collect the variant forms of the small parties' operationalisation; this is shown below in Table 1.

I will use consequently the term small party following the approach of many authors (Bolleyer 2007, 121; Browne and Franklin 1973, 460; Druckman and Roberts 2005, 537; Mattila and Raunio 2006, 434; Harmel and Robertson 1985, 505). However, some scholars use the category of minor party (Rokkan 1966, 73–75; Bélanger 2004, 1054; Small 2008, 51; Denmark and Bowler 2002, 47; Bochel and Denver 2008, 577) or niche party (Spoon 2009, 628; Van der Brug and Fennema 2009, 589; Miller 2007, 81; Meyer and Wagner 2013, 1247; Meguid 2008, 347) as an equivalent term.

Table 1 presents four approaches to operationalisation of the term of small party. However, I recognise the proposal of Bolleyer (2007, 138) as the most valuable for the purposes of this paper since it supports the analysis of the cases operating in the different environments. She defined as small those parties that hold $100/N$ percent of parliamentary seats or less, where N stands for the number of parliamentary parties. In her research, she managed to follow the methodological guidelines of Smith (Smith 1991, 25) who suggested that the numerical approach gives the opportunity to do comparative research but also emphasised the fact that smallness is a relative concept, specific to a given party system. I will employ the strategy of Bolleyer, slightly modifying the method utilised in the case-selection process; the formula that I propose reflects more precisely the fragmentation of a particular party system, which is important because

‘smallness’ can only be defined in a specific context. The detailed proposal will be presented in the next part of the paper.

TABLE 1: OPERATIONALISATION OF SMALL POLITICAL PARTIES IN PREVIOUS RESEARCH IN WESTERN EUROPE

Author	Duverger	Mair	Spoon	Bolleyer
Category used by the author	Minor	Small	Small	Small
Sample selection method	Difficult to define	Quantitative	Quantitative and qualitative	Quantitative
	- Indicated personality parties and permanent minority parties	<ul style="list-style-type: none"> - Maintained a stable position at the heart of a party system; this assumption excludes parties which did not participate in at least three terms of parliament (not necessarily consecutive); - could not be described as micro, which P. Mair attributed to parties that gained less than 1% electorate support in at least three elections; - did not reach over 15% threshold of support in parliamentary election; parties that crossed the 15% threshold were defined as large, even if they did not reach the 15% threshold three times before; - gained steady support between 1–15%, hence were neither micro nor large parties 	<ul style="list-style-type: none"> - Appeal to a subset of the population and do not seek to be catchall parties by broadening their ideological appeal to attract the greatest number of voters. To be included in the small party category, a party must be small in terms of ideology (thus, must focus on a limited set of issues) or be small in terms of vote and seat share (that is, not among the major players in a party system). 	<ul style="list-style-type: none"> - based on the mathematical formula: small parties are those that hold 100/N per cent of the parliamentary seats or less; N - the number of parties gaining parliamentary representation. Only those parties are considered that held on average two percent of the seats over the Elections except for parties that entered government.
Types, subsets, and examples	<ul style="list-style-type: none"> - personality parties (parliamentary group within a political party (Lloyd George faction in Liberal party in Great Britain), the satellite parties (the Union of Progressive Republicans circling around the Communist party in France, - permanent minority parties - based on ethnical or geographical minorities (Polish Czech, Slovak parties in Austro-Hungarian Empire), parties based on religious minorities (in Africa and Asia religious minority parties), parties based on political minorities (the Communist parties in Great Britain and Belgium). 	<ul style="list-style-type: none"> 86 small parties in Western Europe 1947 – 1987 belonging to all families: <ul style="list-style-type: none"> - communist, - socialist, - Christian, - liberal, - extreme right, - conservative and other right, - agrarian, - nationalist/regionalist, - ecologists, - others 	<ul style="list-style-type: none"> - European green parties, winning between 3 and 8 percent of the vote in national elections, - far-right parties, such as the Freiheitliche Partei Österreichs (Austrian Freedom Party, FPÖ) and the Schweizerische Volkspartei (Swiss People’s Party, SVP), - traditional party families with very low vote or seat shares (the Swedish centre-right Kristdemokraterna - Christian Democrats, the British Liberal Democrats) 	<ul style="list-style-type: none"> - Parties were divided into 4 groups: pivotal/central actors, pivotal/non-central and non-pivotal/central parties, non-pivotal/non-central.

Source: Own study based on Duverger (1954, 290–292), Mair (1991, 43–44), Spoon (2011, 5) and Bolleyer (2007, 134–138).

Having employed mostly the quantitative methods in this paper, I will not be focused on answering the question of if small political parties are able to accomplish their programmatic goals while being in the coalition, but if they are recognised as relevant or even essential for larger parties (*formateurs*) during the process of government formation. They might be invited to the coalition because of the seat shares they control, the values they promote or both aspects. Thus, I will examine the phase of coalition formation and the weight of small

parties in this process. As a result, the visibility of small party weight understood by Bolleyer (2007, 122) as programmatic commitment included in coalition agreement and a degree to which small party can transfer it into legislation will not be covered by this study.

Being concentrated on quantitative measures, I will not resign from also exploring qualitative data thoroughly. I will present the ideological profile of small parties, the character of coalitions (minimal winning, surplus, etc.) or the ideological distance between junior and senior coalition partners. However, some of these variables appeared almost completely irrelevant. I will refer to this issue while presenting the findings.

My goal in this paper is to cover all EU states in which coalition governments are formed, not differentiating between Western, Central and Eastern Europe. Such comparison might be interesting, but the number of cases included in the sample imposed significant limitations related to splitting the group of small parties. Hence, I will not divide them in this paper, but further studies aiming at such comparison and employing a slightly different methodology might be worth continuing. The next part of this paper is devoted to the presentation of the consecutive stages in this research and the employed methods.

2 RESEARCH METHODS

The presented research has two goals. Firstly, it aims to propose an original operationalisation of the term 'small party' based on the assumption that the meaning of this category is contextual and connected with the number of political parties competing in party systems. To accomplish this, the mathematical formula will be utilised in the process of selecting cases. Secondly, this paper explores the determinants of small parties' entrance into the government and preconditions of their representation size in the coalition government.

The formula was inspired by the effective number of parties at parliamentary level proposed by Laakso and Taagepera (1979, 4). The formula of small party threshold (SPT) can be presented as:

$$Spt = \frac{1}{2 \times ENP} \times 100\% = \frac{0.5}{ENP} \times 100\%,^2$$

where SPT stands for small party threshold, and ENP stands for effective number of parties.

Using this formula, firstly, I selected small political parties that in the result of at least two consecutive elections did not pass the small party threshold. This meant that based on data from Döring and Manow (2020) I had to calculate the small party threshold for the results of each parliamentary elections in 27 EU states (there were no small parties in parliaments of Malta) between 1990 and 2019 and compare it with the seat share for each political party. Then, the status of the party (its smallness) was defined for each parliamentary term. Such an approach can be regarded as reflecting Nicklas Luhmann's (1996, 44) suggestion that "[i]t would be wrong simply to understand structures as atemporal and processes as temporal" and can be also justified by numerous examples of small parties' metamorphosis, particularly visible in the case of CEE states.

² This formula was firstly used in (Sula 2018); it was developed with the help of Rein Taagepera during my visit to Tartu University in 2012.

Adopting the rule of two consecutive elections as the criterion for incorporating the parties into the dataset stemmed, on the one hand, from the conviction that ‘smallness’ needed to be a permanent feature, but on the other hand, limiting the number to two elections was the strategic decision, precluding the complete elimination of the Central and Eastern European cases, as in this region political parties have been less stable than their Western European counterparts.

Secondly, I decided to exclude all parties not competing independently in the elections from the study. This assumed that the analysis of political parties should not be combined with the electoral performance of electoral alliances set up by a few political groups only for the purpose of the elections. Methodological stringency and clarity justified such an approach, as I took into consideration the parliamentary representation of parties and wanted to avoid the discrepancies between for instance the names of the actors that were competing in the elections and those that had the parliamentary representation. It resulted in selecting 123 cases from all EU members. The only state in which no small party managed to enter the parliament was Malta. In this way, I created a dataset that contained the information on the small political parties competing in 218 parliamentary elections between 1990-2019. The starting point in this analysis has been justified by the fact that first fully competitive elections after the collapse of communism in CEE states were organised in 1990.

Thirdly, I calculated Banzhaf power index values for all parties competing in these 218 elections so that I could obtain the respective data only for small parties. I suppose that further clarification should be made on Banzhaf power index, called by Felsenthal and Machover (1998, 2) relative a priori voting power since it is determined by power of other actors. It might be contrasted with absolute voting power, expressed by the number of seats in the parliament.

The Banzhaf power index is a formula that enables assessing the voting and bargaining power of each actor in each environment (in the case of this research, the political parties in their respective parliaments). The power index is computed for each party. The calculation process aims at answering in how many minimal winning coalitions a given party can be regarded as a critical partner, i.e. essential for forming a winning coalition (Leech 2002, 2). To explain the formula, I will use the example given by Warwick and Druckman (2006, 644–645). If party A and B control 45% seats in the 100-seat parliament and party C 10% there are 3 minimal winning coalitions possible: AB, AC, BC. It means that all parties are pivotal and receive the score 0.33, which means that their a priori relative power is equal.

I have calculated the Banzhaf Power Index with the help of a computer algorithm for voting power analysis, published at the website that is managed by Dennis Leech and Robert Leech (n.d.). The results of the BPI were later used in comparison with the virtual political parties’ representation in the governments. The data on government portfolio allocations were taken from the Political Data Yearbook (n.d.) and all missing data was calculated based on Database on WHO GOVERNS in Europe and beyond (Bértoa 2023).

Fourthly, I created the final dataset that contained following variables (abbreviations used in the dataset are given in brackets):

- governments (43 coalition government with one small party)
- junior coalition partner (JP; dummy variable); as mentioned before I analysed 26 parties, but they entered 43 coalition governments, whereas at the

parliamentary level there were additional 47 small parties that did not enter the government.

- Banzhaf power index (BPI),
- government position percentage (GPP),
- position on the left – right axis (LR),
- the ideological distance between junior and senior coalition partners (LRD),
- seat shares (SS) controlled by the party,
- the number of potential junior partners (PJP), other than the one that joined the coalition.

3 SMALL PARTIES IN GOVERNMENTS: BETWEEN ARITHMETIC AND IDEOLOGY

As was mentioned before, I analysed the performance of 26 parties in 21 European states joining 43 governments as junior coalition partners. I took into consideration only the first coalition government created after the parliamentary elections. These 43 governments were formed with the engagement of 26 small parties out of 73 that were present in the parliament and had the status of small party. The list of 26 small governmental parties is given below in Table 2.

TABLE 2: SMALL PARTIES IN EUROPEAN GOVERNMENTS (1/2)

No.	Political Party name/name in English (abbreviation in a brackets)	Country	Election Date	SPT	Seat share	BPI	GPP	Type of coalition	Number of potential junior partners (without the party of interest)
1.	Freiheitliche Partei Österreichs/ Freedom Party of Austria (FPÖ)	Austria	2002/11/24	16.67	9.84	16.66	25	minimum winning	2
2.	Dvizhenie za Prava i Svobodi/ Movement for Rights and Freedoms (DPS)	Bulgaria	2001/06/18	17.24	8.75	10	11.76	surplus coalition	2
			2013/05/12	16.13	15.00	25	11.76	multi-party minority government	2
3.	Křesťanská a demokratická unie - Československá strana lidová/ Christian Democratic Union - People's Party (KDU-CSL)	Czech Republic	1996/06/01	12.2	9	10.71	25	multi-party minority government	4
			2013/10/25	8.62	7	5.65	17.65	minimum winning	6
4.	Det Radikale Venstre/ Danish Social Liberal Party (RV)	Denmark	1998/03/11	10.2	3.91	4.04	20	multi-party minority government	12
5.	Konservative/ Conservatives (KF)	Denmark	2001/11/20	10.69	8.94	9.95	33.33	multi-party minority government	10
6.	Sotsiaaldemokraatlik Erakond/ Social Democratic Party (SDE)	Estonia	2007/03/04	11.36	9.90	5.56	21.43	minimum winning	4
7.	Ruotsalainen Kansanpuolue - Svenska Folkpartiet i Finland/ Swedish People's Party (RKP-SFP)	Finland	2003/03/16	10.20	4	3.45	11.1	surplus coalition	7
8.	Freie Demokratische Partei/ Free Democratic Party (FDP)	Germany	1990/12/02	15.62	11.93	23.08	25	minimum winning	4
			1994/10/16	14.7	6.99	14.29	16.67	minimum winning	4
9.	Bündnis 90 / Die Grünen/ Alliance 90 / Greens (B90/Grüne)	Germany	1998/09/27	15.15	7.03	9.09	18.75	minimum winning	4
			2002/09/22	14.70	9.12	16.67	21.43	minimum winning	4
10.	Anexartitoi Ellines/ Independent Greeks (ANEL)	Greece	2015/01/25	16.13	4.33	2.7	6.67	minimum winning	5
			2015/09/20	15.62	3.33	1.43	5.58	minimum winning	6

TABLE 2: SMALL PARTIES IN EUROPEAN GOVERNMENTS (2/2)

No.	Political Party name/name in English (abbreviation in a brackets)	Country	Election Date	SPT	Seat share	BPI	GPP	Type of coalition	Number of potential junior partners (without the party of interest)
11.	Független Kisgazda Párt/ Independent Small Holders Party (FKgP)	Hungary	1998/05/24	14.71	12.44	26.92	23.5	surplus coalition	4
12.	Szabad Demokraták Szövetsége/ Alliance of Free Democrats (SzDSz)	Hungary	2002/04/21	20.00	5.18	16.67	26.7	minimum winning	2
			2006/04/09	19.23	5.18	9.09	23.1	minimum winning	4
13.	Progressive Democrats/ Progressive Democrats (PD)	Ireland	1997/06/06	16.67	2.41	4.51	6.7	multi-party minority government	7
			2002/05/17	15.15	4.82	2.39	13.3	minimum winning	7
14.	Nacionālā apvienība / Tēvzemei un Brīvībai / LNNK/ National Alliance / For Fatherland and Freedom / LNNK (NA/TB/LNNK)	Latvia	2002/10/05	10	7	7.14	11.11	minimum winning	4
			2006/10/07	8.33	8	5.51	15.8	surplus coalition	5
15.	Lietuvos Krikščionys Demokratai/ Lithuanian Christian Democrats (LKDP)	Lithuania	1996/10/20	15.15	11.68	0	16.67	surplus coalition	12
16.	Lietuvos lenkų rinkimų akcija/ Election Action of Lithuania's Poles (LLRA)	Lithuania	2012/10/14	9.09	5.67	3.6	6.67	surplus coalition	7
17.	Déi Gréng – Les Verts – Die Grünen/ The Greens (Greng)	Luxembourg	2013/10/20	12.82	10.00	11.54	22.22	minimum winning	4
18.	Democraten 66/ Democrats 66 (D66)	Netherlands	1998/05/06	10.42	9.33	5.26	20	surplus coalition	7
			2003/01/22	10.64	4.00	2.82	12.5	minimum winning	7
19.	Polskie Stronnictwo Ludowe/ Polish People's Party (PSL)	Poland	2001/09/23	12.5	9.13	5	12.5	surplus coalition	6
			2007/10/19	17.24	6.74	16.67	15.79	minimum winning	6
			2011/10/09	16.67	6.09	9.09	15	minimum winning	4
20.	Centro Democrático e Social – Partido Popular/ Democratic and Social Centre - People's Party (CDS-PP)	Portugal	2002/03/17	19.23	6.09	18	16.67	minimum winning	4
			2011/06/05	17.24	10.43	9.09	25	minimum winning	3
21.	Uniunea Democrată Maghiară din România/ Democratic Union of Hungarians in Romania (UDMR)	Romania	1996/11/03	8.20	7.29	7.1	8	surplus coalition	8
			2004/11/28	12.20	6.63	4.17	16	multi-party minority government	5
22.	Most-Híd/ Most-Híd (MI)	Slovakia	2016/03/06	8.77	7.33	6.14	14.28	minimum winning	6
23.	Demokratična stranka upokojenecv Slovenije/ Slovenian People's Party (DeSUS)	Slovenia	1996/11/10	9.09	5.56	3.11	5	minimum winning	6
			2008/09/21	11.36	7.78	11.34	15.79	minimum winning	7
			2014/07/13	12.12	11.11	10.38	23.53	surplus coalition	7
			2018/06/03	7.35	5.56	5.2	11.76	multi-party minority government	7
24.	Slovenska ljudska stranka/ Slovenian People's Party (SLS)	Slovenia	2000/10/15	10.2	10.00	7.51	18.75	minimum winning	8
25.	Miljöpartiet de Gröna/ Greens (MP)	Sweden	2014/09/14	10.00	7.16	7.89	25	multi-party minority government	6
			2018/09/09	9.93	4.58	4.24	26,09	multi-party minority government	6
26.	Liberals (Lib)	United Kingdom	2010/05/06	19.23	8.77	20.78	21.74	minimum winning	9

3.1 Small parties' entry into the governments

Attempting to evaluate the role of determinants of small parties' entries to the coalition governments, I estimated a logistic regression model since the output variable had a binary character (enter the coalition or not). The respective results produced by the model are presented below in Table 3.

TABLE 3: LOGISTIC REGRESSION MODEL OUTPUT: SMALL PARTIES' COALITION ENTRY AND ITS DETERMINANTS

Predictors	JP		
	Odds Ratios	CI	p
(Intercept)	0.02	0.00 – 0.26	0.004
SS	1.19	1.00 – 1.42	0.047
BPI	1.14	1.02 – 1.29	0.029
LR	1.43	1.01 – 2.07	0.050
LRD	1.09	0.84 – 1.42	0.536
PJP	0.92	0.74 – 1.13	0.433
Observations	126		
R² Tjur	0.270		

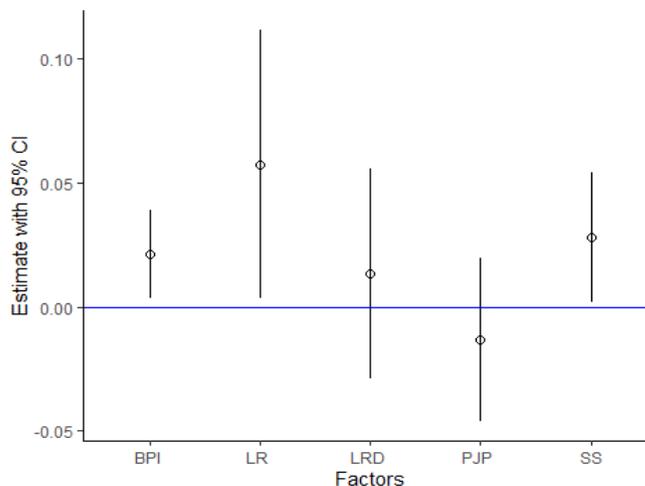
As can be seen in Table 3, the party's position on the left-right axis (LR), Banzhaf Power Index values (BPI), and number of seats controlled by the small party (SS) were estimated as significant predictors of the small parties' entry to a coalition. To determine the influence of these predictors, I have also calculated odd ratios (OR): OR for LR predictor is 1.43, for BPI OR is 1.14, and OR for SS is 1.19. Since ORs for each predictor are higher than 1, these predictors can be treated as providing increased chances of entering a coalition. However, it should be stressed here that the party's position on the left-right axis (LR) provides a greater increase in the chance of entering a coalition government. It is also worth noting that, surprisingly, the predictive power of seat share was bigger than the one of Banzhaf Power Index. Furthermore, it turned out that the other two variables (the ideological distance between small parties and potential junior partners) did not affect small parties' presence in coalitions. These observations were confirmed by the results of computing Average Marginal Effect. The respective data is shown in Table 4 and maybe even more visible in Figure 1.

TABLE 4: AVERAGE MARGINAL EFFECTS FOR PREDICTORS OF SMALL PARTY BECOMING JUNIOR COALITION PARTNER

Factors	AME	Lower.CI	Upper.CI
BPI	0.02	0.00	0.04
LR	0.06	0.00	0.11
LRD	0.01	-0.03	0.06
PJP	-0.01	-0.05	0.02
SS	0.03	0.00	0.05

As it is shown in Figure 1 the number of parties that might be regarded as potential coalition parties does not play any role in determining the probability of entering the coalition cabinet by the small party.

FIGURE 1: THE VISUALIZATION OF AME VALUES



With respect to interpreting the importance of the position on the left-right axis, as the left-right mean was 4.690 and left-right median was 4.507 (measurement taken on a 0 to 10) scale it must be acknowledged that most parties were left-oriented. Accordingly, the increased probability of joining the coalition is to be seen as resulting from being closer to the centre of the axis, i.e. the closer to the centre the parties were, the greater their chances were of entering a coalition.

3.2 Small parties’ representation in the governments

In order to answer the question of which variables might be regarded as the more powerful determinants of the government representation increase, I estimated a linear regression model with government positions percentage as the dependent variable and the Banzhaf power index, seat shares, position on the left – right scale, the distance between small governmental junior and senior party, and the number of potential junior parties in the parliament as predictors. However, these variables behaved differently in the various models I created. The first one, containing all variables, was not significant at all. Once I separated seat shares and Banzhaf power index and built two independent models, Banzhaf power index and seat shares appeared to be valid and significant. It means that seat shares and Banzhaf power index reduced their importance since BPI is calculated with the use of percentage of seats controlled by the party. Thus, probably the mathematical “proximity” is responsible for the marginalisation of their significance in one model. With respect to the model that included BPI and did not include the seat shares (model 1, see Figure 4), it turned out that other predictors included in the model were of no influence. Therefore, my hypothesis that BPI would have an impact on the number of portfolios controlled by the small parties was confirmed - when BPI value increases by one the portfolios percentage increases by 0.39. Detailed model information is provided in Figure 4 and the effect is presented graphically in Figure 6. However, it turned out that the seat share was even more influential and significant, which is displayed in Figure 5. With a one percent increase of seat shares, the government position percentage increases by 0.76 percent.

As I wrote above, the two independent variables that had a statistically significant impact on the small parties' shares in the government were BPI values and seat shares. However, the above data and especially what can be seen in Figure 6 suggests that the distance between junior and senior coalition parties had an impact on GPP as well. Even though these predictors were returned as statistically insignificant, it can be said the tendency is illustrated well and the problem with statistical significance might arise from small sample size. Nevertheless, the interpretation of this tendency is a little bit more 'sophisticated', which means that the distance between senior and junior parties increase when the small party is more to the left. Therefore, it can be argued that the more left-oriented parties enter the coalition government the more consensually-oriented the senior party and the coalition are.

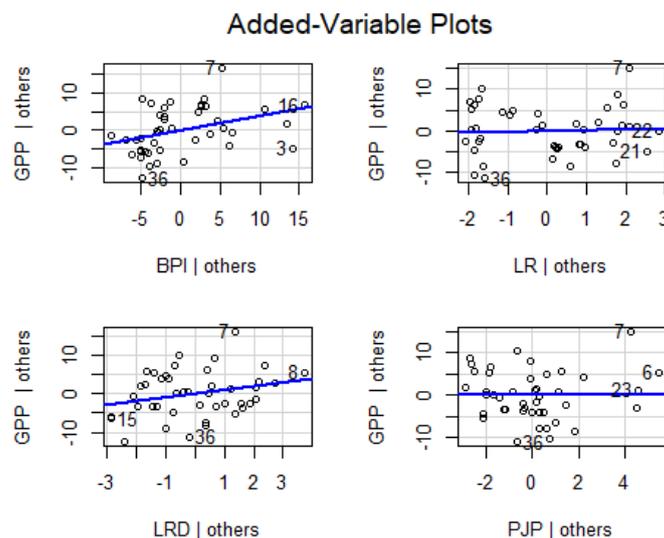
TABLE 5: LINEAR REGRESSION MODEL OUTPUT: GOVERNMENT POSITION PERCENTAGE AND ITS DETERMINANTS (MODEL 1)

Predictors	GPP		
	Estimates	CI	p
(Intercept)	13.07	3.17 – 22.96	0.011
BPI	0.39	0.06 – 0.71	0.021
LR	0.17	-1.06 – 1.39	0.786
LRD	0.95	-0.23 – 2.13	0.112
PJP	0.04	-0.91 – 0.99	0.935
Observations	43		
R² / R² adjusted	0.249 / 0.170		

TABLE 6: LINEAR REGRESSION MODEL OUTPUT: GOVERNMENT POSITION PERCENTAGE AND ITS DETERMINANTS (MODEL 2)

Predictors	GPP		
	Estimates	CI	p
(Intercept)	12.82	2.59 – 23.05	0.015
SS	0.76	0.08 – 1.44	0.029
LR	0.18	-1.05 – 1.41	0.768
LRD	0.97	-0.22 – 2.16	0.107
PJP	-0.31	-1.18 – 0.56	0.473
Observations	43		
R² / R² adjusted	0.238 / 0.158		

FIGURE 2: GOVERNMENT POSITION PERCENTAGE AND ITS DETERMINANTS



The above conclusion corresponds with the results of linear regression analysis with the distance between junior and senior parties as the dependent variable and the small party position on the left – right axis as the predictor; shown in Figure 2 and Table 7.

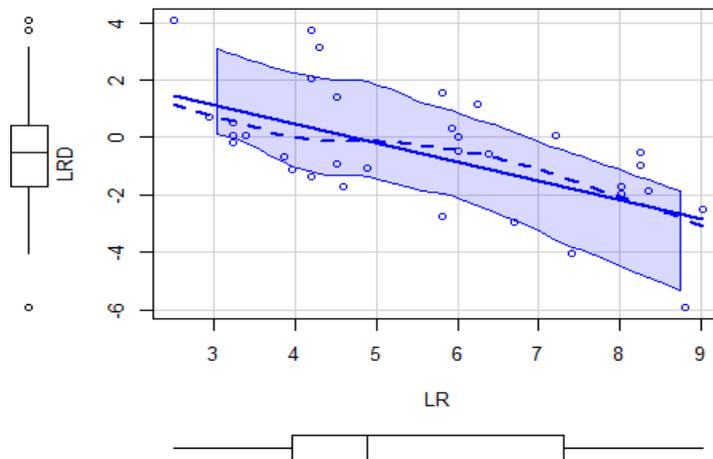
TABLE 7: LINEAR REGRESSION OUTPUT: THE RELATIONSHIP BETWEEN LEFT-RIGHT DISTANCE AND THE POSITION OF THE SMALL PARTY ON THE LEFT-RIGHT AXIS

Predictors	LRD		
	Estimates	CI	p
(Intercept)	3.07	1.55 – 4.59	<0.001
LR	-0.66	-0.92 – -0.40	<0.001
Observations	43		
R ² / R ² adjusted	0.388 / 0.373		

The association between political party position and the distance between small party and its coalition partner is better displayed in the scatterplot (Figure 3): the closer to the right a party is, the smaller is the ideological distance between coalition partners. However, as I mentioned before, being more on the right means to be closer to the centre of the political spectrum. Such opinion is justified also by the distribution of observations:

- minimum value (-5.9050),
- 1st quartile (-1.7060),
- median (-0.5040),
- 3rd quartile (0.4165).

FIGURE 3: THE VISUALISATION OF THE RELATIONSHIP BETWEEN LEFT-RIGHT DISTANCE AND THE POSITION OF THE SMALL PARTY ON THE LEFT-RIGHT AXIS



I will not present the data on the role of government type in affecting the character of other variables since having checked it while doing this research, I found out it was completely irrelevant. It means that the character of none of other variables was shaped by the type of coalition government. It can be added that I recoded the types of governments into two categories with surplus coalitions and multi-party minority governments in one group and minimal winning coalition in the second. It stemmed from the fact that only minimal winning coalitions were the ones for which small parties were necessary elements.

4 CONCLUSIONS

One of the main identifiable challenges in existing literature on small political parties is related to defining “smallness”. Therefore, it can be argued that whenever the term appears in the text it should be preceded by its operationalisation. However, one can say that the clear distinction between small and large parties can be easily found in the discussion on the system if “small” is used as a label to describe bigger and smaller parties. Another problem that must be clearly stressed in future studies on small parties is the recognition of the temporality of small parties’ statuses. As I mentioned while describing steps of this research, I identified 123 small parliamentary parties. It means that these parties were considered as small in two consecutive elections between 1990 and 2019 but some of them disappeared and some others became more successful electorally.

This paper also showed that the percentage of votes controlled by the small party is a slightly better predictor than the values of Banzhaf power index. It applies to explaining entering the government as well as to the percentage of controlled portfolios. However, both variables were relevant and significant. In contrast, the number of potential coalition partners did not affect the chances of the small party entering the government. In this context, I can admit I expected that the Banzhaf power index would be more important. However, it can be argued that once senior political parties give priority to those parties who are closer to them programmatically, it is logical that they would not consider theoretical/arithmetic strength but a less sophisticated combination of seats, programme proximity and former experiences.

It can be emphasised also that this paper did not aim at dealing with portfolio salience since the outcome (dependant variable) was designed here as the numerical one. Incorporating the quantitative components, as it was tested in the research of Druckman and Roberts (2008, 102–103) or Warwick and Druckman (2006, 640) might be worth developing in future studies. However, it is not very common that hierarchical order of portfolios can be derived from official documents like in the case of the Fifth Republic (Bucur 2018, 155). Further limitations with using portfolio salience might be related to the fact that political party programmes vary over time and the jurisdiction of portfolio might evolve and vary between countries (Bäck, Debus and Dumont 2011, 453, 473). Thus, there might be a problem with defining a portfolio’s importance, especially while having newly and established democracies in the same group. The former ones formulated portfolio salience differently since in the 90s privatisation was recognised as one of the most important challenges, absent in the mature European democracies. Another problem might be associated with the strategy of political parties, that might be explained by PSO theory of Meguid (2008, 16–26), who emphasised the variance of issue salience in each election.

With respect to the pivotality of small parties (see Bolleyer 2007, 125), this study showed that this was the attribute of a few of them (DeSUS, D66, KDU-CSL, PSL) and a few more became loyal to the same coalition partner. The result of the study also revealed that the number of potential coalition partners did not have any influence on the success of small parties in terms of their entry to government or the number of obtained portfolios. However, in this respect as well as in the case of other variables, small sample size must be taken into account. Hence, the method I employed in this study might lead to such conclusions but under some

other circumstances the number of potential junior coalition parties might become more relevant.

My intention in this article was to avoid the shortcomings in earlier studies on cabinet formation that were identified by Garrett Glasgow and Sona N. Golder (2014, 739). Following the postulates of both authors, and bearing in mind that I am interested in specific parties and not coalitions as a whole, I designed the research to take into account not only the characteristics of the parties I studied, but also their coalition partners. I achieved this effect by applying a case selection formula, relativising their arithmetic strength (quantitative dimension) and, in a qualitative sense, taking into account the ideological distance between the parties that I am interested in and their coalition partners. By considering the number of variables when examining the determinants of the participation of small parties in government coalitions, I referred to the research conducted by Lanny W. Martin and Randolph T. Stevenson (2001), although the scope of my undertaking was much narrower. Hence, this study provides a springboard for examining the capability of the parties that have similar levels of power in different party systems. Such future studies might employ more qualitative approaches focused on examining the congruence between programmes of governments and parties.

Furthermore, it is worth mentioning a problem which, in the context of this article, is marginal but, from the perspective of the weakening of democracy in some European countries, is of fundamental importance. The presence of small parties in political systems can be interpreted as an indicator of the vitality of democracy, and their absence may result from strategies of largest parties oriented towards marginalising smaller actors, which is clearly illustrated by the example of Hungary from 2010 onwards (Szabó 2020, 31).

The datasets utilised in this research have been already published in the Harvard Dataverse Repository <https://doi.org/10.7910/DVN/VRMUHQ>

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ZGODOVINA, KI JO PIŠEJO PORAŽENCI? MAJHNE STRANKE V EVROPSKIH VLADAH 1990 – 2019

Prispevek skuša identificirati dejavnike uspeha (vstop v vlado) majhnih političnih strank v 21 evropskih državah. Čeprav se izraz majhna stranka precej pogosto uporablja, meje med majhnimi, srednjimi ali velikimi strankami niso natančno začrtane. Da bi rešili to težavo, predlagamo izvirno matematično formulo za izbiro

skupine 26 majhnih strank na podlagi istih meril v 21 evropskih državah. Na tem vzorcu analiziramo vse koalicijske vlade, v katere so bile te stranke povabljene kot manjši partnerji. Glavni cilj prispevka je razložiti vzroke za prisotnost majhnih strank v vladah in raziskati determinante dodeljevanja ministrstev s kombinacijo kvantitativnih (tj. Banzhafov indeks moči) in kvalitativnih (ideološka distanca) meritev. Nekateri zaključki potrjujejo dosedanje ugotovitve (nesorazmerna razdelitev ministrskih mest v korist majhnih strank), nekateri pa se le delno prekrivajo z zaključki prejšnjih študij (razmerje med številom potencialnih/alternativnih sodelavcev in verjetnostjo, da majhna stranka postane koalicijska stranka). Študija obravnava primere iz držav srednje, vzhodne in zahodne Evrope.

Ključne besede: majhne stranke; vladno predstavništvo; evropske države.



PARLIAMENTARY ELECTIONS AND SOCIAL EMOTIONS: QUANTITATIVE SURVEY FROM EUROPE 1900–2020

Jiří NESIBA¹

The paper presents the findings of a survey of parliamentary elections in Europe from 1900 to 2020, conducted in the chambers of deputies of European national states. The frequency of elections is examined in relation to the number of political parties elected to parliament, with an average correlation calculated for each year. The results demonstrate a correlation between these two phenomena. The correlation has been tested using the Pearson test. The presence of a greater number of parliamentary political parties and the occurrence of more frequent elections can be considered indicators of collective social emotions. The paper presents new perspectives of exploring the sociology of emotions or the politics of emotions. Furthermore, the author complements the research with a detailed statistical analysis of the period in which the correlation is most pronounced (1919–1990), which corresponds to the theory of the short twentieth century.

Key words: parliamentary elections; political parties; social emotions; collective emotions.

1 INTRODUCTION

Social emotion is an ambiguously measurable phenomenon (Halle and Darling-Churchill 2016; Nowinski 2021). Studying social mood across generations is even more ambiguous (Barrett 2006; Wilhelm and Schoebi 2006; Langener et al. 2024). Nevertheless, we can look for new ways to study social mood and emotions from the political science perspectives (Olson 2011). In this way, the field of political development and international relations can be seen as an integral part of the wider social psychological sciences (Tamene 2013). This paper presents the results of an analysis of parliamentary election results, which point to quantifiable phenomena indicative of the dynamics of social emotions as a “big picture” of European society.

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The research presented in this paper focuses on the technical aspect of parliamentary election results. The frequency of elections per calendar year in the European countries studied (1) and the average number of political parties elected to European national parliaments in the same year (2). These statistical relations, despite all the specific aspects of different national legislation and changes in electoral laws, point to generally measurable data from which the dynamics of social emotions in Europe can be observed from a macro perspective. These phenomena can therefore be considered as secondary manifestations of social sentiment. The research covers a statistically significant period of one hundred and twenty years, i.e. 1900-2020, and provides results on the degree of statistical dependence of the data describing the social phenomena mentioned.

Author focuses on the analysis of parliamentary elections in individual European countries. Normally, elections are held according to the recognised length of the government's term of office, which is usually limited to a maximum of four years (according to the constitution or laws of a given state). Four-year electoral cycles are part of the modern political tradition (outside Europe, four-year cycles also function in the USA as the four-year presidential cycle or the presidential cycle pattern, and these four-year cycles can also be found outside the political sphere, such as the holding of the Olympic Games or the world championships in various sports). However, regular four-yearly political elections tend to be altered by changes in the social emotions due to various political crises, which in a democratic society often lead to new elections (so-called snap elections). Governance opens to new political actors. The increase in the frequency of elections and the growth in the number of different political parties elected testify to the increasing dynamism of social emotions. Conversely, the decline in early elections, the adherence to four-year cycles and the shrinking number of elected political parties indicate a decline in the dynamics of social emotions in this area. The increasing dynamics of change and political fragmentation can be seen as a manifestation of diverse social emotions. In this paper, we do not explore the typology of social emotions. The individual expressions of emotions are diverse, depending on the mood of the time and the peculiarities of the nation states. Plutchik speaks of a *wheel of emotions* with different combinations of individual emotions (so-called dyads, triads, cf. Plutchik 1991). Ekman compares the combination to an *atlas of emotions*, where the individual colours overlap (e.g. Watt-Smith 2016; Barrett 2018).

This research provides empirical data on how, on average, the frequency of parliamentary elections in Europe relates to the average number of political parties elected to each parliament. The sociology of emotions can understand parliamentary elections as a concomitant phenomenon of the rise or fall of manifestations of publicly declared social sentiments. Indeed, an individual's decision to vote is linked to the mood of society as a whole. The observed correlation between these two phenomena does not provide an answer to the question of whether there is a third hidden variable and, if so, what their common cause might be. The existence of a correlation between two variables does not necessarily imply a causal relationship (in accordance with the scientific principle: "This, therefore, because of this", lat. *cum hoc, ergo propter hoc*).

The tendency of individual choices to be influenced by public mood opens the possibility of interdisciplinary research between the two fields, first explored in classical ethnomethodological or anthropological studies of modern society (Kemper 1978; Collins 2004; Jasper 2011; Hochschild 2016). Knowledge of the possibility of individual universal or social emotions allows for an elegant explanation of how decision making is transmitted from the individual to the

mood of the whole society (Haidt 2003; Ekman and Cordaro 2011). The research question examines whether there is a statistical relationship between the number of elections and the number of political parties elected to national parliaments in Europe 1900-2020.

2 SOCIOLOGY OF EMOTIONS

The intersection of social emotions and political behaviour is a fundamental area that highlights the importance of emotional dynamics in shaping political attitudes and social interactions. Collective emotions play a crucial role in political discourse, influencing how individuals engage with political content and each other (Gross 2008; Groenendyk 2011; Brader 2011). Theory of collective emotions is closely linked to the current theory of communitarianism (Habermas 1979). For example, it is emphasised that the emotional responses elicited by political disagreements within social networks can significantly influence political engagement and behaviour, suggesting that emotions are not merely personal experiences but are deeply embedded in social contexts (Parsons 2009). This is consistent with findings arguing that emotions, particularly hatred, can shape political behaviour by influencing intergroup dynamics and attitudes (Halperin, Canetti and Kimhi 2012). The emotions that arise from political contexts can thus lead to collective behaviours that are central to political mobilisation and discourse.

Damasio states that personally beneficial decision making requires emotion as well as reason (Damasio 2008). He also proposed the somatic marker hypothesis, which describes a mechanism by which emotional processes can guide (or bias) behaviour (Bechara and Damasio 2005). Pfister and Böhm (2008) have developed a classification of how emotions function in decision making that conceptualises an integral role for emotions, rather than simply influencing decision making. The possible relationship between individual and social emotions can be examined according to the traditional Schachter-Singer theory of the transmission and dynamization of individual emotions in interaction with others (Kleef van et al. 2002; Doorn van et al. 2015).

Emotional transmission and mood changes in society are not only studied in sociological settings but are also related to the question of the philosophy of history (Hesiod, Aristotle, T. Aquinas, G. T. Aristotle, T. Aquinas, G. Vico, G. W. F. Hegel, A. Toynbee, V. Pareto, O. Spengler). Research into the universal manifestations of biological emotions, from the mammalian level to human society, is one of the cornerstones of the gradualist theory of zoopsychology, which links evolutionary development within Darwinian theory (White 2009).

The history of empirical research on social emotions dates to the first half of the 20th century, with A. Kroeber, M. Mead or P. Sorokin, but it was the possibility of comprehensive data collection that brought new discoveries to the field (Shariff and Tracy 2011). This is modern research on social emotional change and stock market decision making (Saurabh and Dey 2020). The most comprehensive research in this area is brought by a specific research direction in culture and socioeconomics, which is called socionomics (Prechter 2017). Prechter's socionomic hypothesis suggests that social mood drives various types of social action in the areas of cultural, political, and financial behaviour. Therefore, based on socionomic approaches, typologies are created that classify the types of moods of society and individuals according to similar types. One such typology is the Profile of Mood States, which is based on seven dimensions of social mood.

These include 1. Tension - relaxed or anxious, 2. Happiness - happy or depressed, 3. Calmness - calm or angry, 4. Vigour - apathetic or vital, 5. Fatigue - rested or tired, 6. Confusion - sure or confused, 7. Friendliness - aloof or friendly (Bollen et al. 2011).

The process of sharing emotions in social contexts is not straightforward. The intensity of emotions can determine the extent of social sharing, suggesting a non-linear relationship between emotional experiences and social behaviour (Luminet et al. 2000). This indicates that in political contexts, the emotional intensity experienced by individuals can markedly influence their inclination to engage in political discourse and disseminate their perspectives, thereby impacting the broader political landscape. It is imperative to acknowledge the significant role that social media plays in amplifying this emotional exchange. The available evidence indicates that messages characterised by strong emotional content are more likely to be shared on social media platforms such as Twitter, thereby increasing their reach and impact on public opinion (Stieglitz and Dang-Xuan 2013). The nature of social emotions is undergoing a transformation. The statistical correlation between the frequency of elections and the number of political parties has been declining since 1990, with the advent of modern social networks. This indicates that emotions such as anger and fear can drive different online behaviours and influence how individuals interact with political content and with each other (Wollebæk et al. 2019).

The implications of these emotional dynamics extend to the understanding of collective behaviours in political contexts. Collective emotions, particularly fear, can significantly influence group behaviour and political orientations, particularly in contexts perceived as threatening (Bar-Tal 2004). This collective emotional orientation can lead to heightened political engagement or, conversely, to political apathy, depending on the emotional climate, emotional expressions can bolster moral claims and influence public perceptions (Brady et al. 2019).

The concepts of social emotions, social sentiments or social mood are integral to understanding human behaviour in both social and political contexts. Social emotions refer to the feelings that arise in interpersonal interactions and are influenced by social dynamics, while social mood encompasses the collective emotional state of a group, which can significantly impact decision-making and behaviour. Social sentiments, often reflected in public opinion, can be shaped by these emotions and moods, particularly in the context of social media and interpersonal communication.

Research indicates that social emotions can significantly influence individual and group behaviours. For instance, demonstrate that online social evaluation can affect mood and cognition, particularly among young people, highlighting the role of social rejection sensitivity in shaping emotional responses (Grunewald et al. 2022). This finding aligns with the work of, who explore the co-evolution of emotional well-being with friendship ties, suggesting that both positive and negative effects are crucial in understanding social behaviour (Elmer et al. 2017). The interplay between mood and social interactions is further emphasized. The mood can affect self-control and decision-making, indicating that emotional states can drive individuals toward or away from specific social goals (Fishbach and Labroo 2007).

The influence of mood within social networks plays a pivotal role in shaping collective emotional states. The evidence presented by Block and Heyes (2022) challenges the traditional notion that positive emotions are more contagious, demonstrating that negative moods can spread more readily than positive ones.

This dynamic is of great importance in understanding how social moods can shift within groups, particularly in response to shared experiences or crises. One such example is the response to the global pandemic of the novel coronavirus (2019-nCoV), where social distancing was found to exacerbate feelings of isolation and negative moods (Zhang et al. 2020).

The implications of social mood extend to various domains, including financial behaviour. Define social mood as the aggregate mood of investors, suggesting that fluctuations in social mood can influence risk tolerance and investment decisions (Asad et al. 2021). The collective emotional states can drive financial and social trends, emphasizing the importance of understanding social sentiments in the economic contexts. The interplay between social emotions, social sentiments or longer-term social mood is complex and multifaceted. These constructs not only influence individual behaviours but also shape collective dynamics in various social contexts, including political engagement, interpersonal relationships, and economic decision-making. Understanding these emotional undercurrents is essential for comprehensively analysing human behaviour in social settings.

3 SOCIAL EMOTIONS AND PARLIAMENTARY ELECTIONS

Political elections serve as a significant expression of social emotions, reflecting the collective sentiments and moods of the electorate. The interplay between social media and political campaigns has transformed how emotions are expressed and perceived during elections, making it crucial to analyse these dynamics critically. Research indicates that public emotions, as captured through social media, can serve as a powerful predictor of electoral outcomes (Groshek and Al-Rawi 2013).

The role of social movements and protests in shaping electoral outcomes is a critical area of study. Social emotions mobilized through protests can directly impact election results (Ellinas and Lamprianou 2023). This connection between social movements and electoral behaviour underscores the importance of understanding the emotional undercurrents that drive voter mobilization and sentiment. The use of emotions analysis in political campaigns has gained traction, enabling candidates to gauge public emotions and adjust their strategies accordingly. For instance, discusses how sentiment analysis can provide insights into public perception during elections, allowing political actors to tailor their messaging to align with prevailing sentiments (Khan et al. 2023). This approach is further supported by studies, which highlights the significance of sentiment analysis in understanding voter specific concerns and preferences during elections (Chandra and Saini 2021; Passi and Motisariya 2022; Gunhal 2023).

The frequency of political elections is a significant indicator of the underlying socio-economic aspects of society. It is erroneous to view elections as mere procedural events; rather, they reflect the underlying emotional and psychological states of the electorate, which are influenced by several factors, including socio-economic conditions, political stability, and public sentiment. The relationship between election frequency and socio-economic factors can be investigated through several different lenses, including the impact of political uncertainty, the dynamics of social media, and the psychological effects of governance.

One crucial aspect of this relationship is the concept of political uncertainty and its impact on economic behaviour. The argument is put forth that elections provide incumbents with incentives to manipulate fiscal and monetary policies with the aim of influencing economic activity to secure re-election (Brandon and Yook 2012). Such manipulation can result in short-term economic gains that may prove unsustainable, ultimately affecting long-term economic stability. The cyclical nature of elections can thus create an environment of uncertainty that exerts an influence on corporate investment decisions and broader economic trends. It is evident that parliamentary elections are not merely procedural events; they are deeply intertwined with social emotions that shape voter behaviour and public sentiment. The advent of social media as a platform for expressing these emotions has transformed the electoral landscape, making it imperative for scholars and practitioners to undertake a critical examination of the emotional dynamics at play. An understanding of these dynamics can provide invaluable insights into the motivations behind voter behaviour and the factors that influence electoral outcomes.

4 RESEARCH

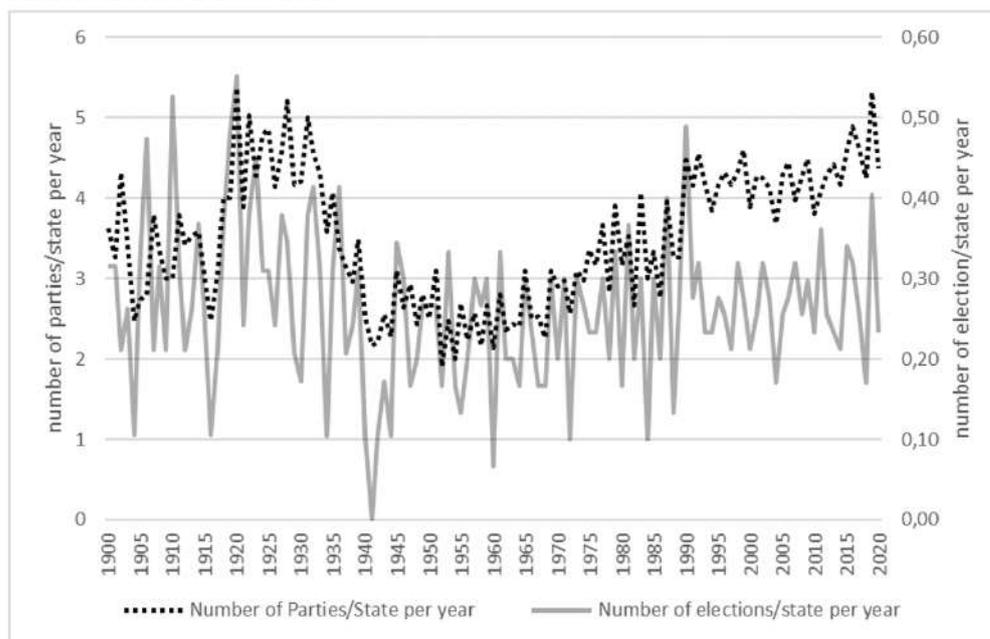
The presented research analysed parliamentary elections in each European country from 1900 to 2020. It looked at the average number of parliamentary elections per year and the number of political entities that made it into the national parliament. Individual states were included in the research in turn when universal parliamentary suffrage for men and women was introduced in each state. Between 1900 and 1919 there were 19 states, between 1920 and 1989 the number fluctuated around 30 states, and since 1990 there have been 47 states. The survey covers all European countries where the constitution provides for the possibility of voting in parliament. Including the countries of the so-called Eastern Bloc, where, in addition to the dominant political force of the People's Democratic Party and the Communist Party, there were also representatives of other political associations (in the case of Czechoslovakia, for example, the Czechoslovak People's Party or the Czechoslovak Socialist Party).

The research focused on a summary of all elections to the lower house of parliament; if there was only one house of parliament in a state, that house was counted. The research did not include types of democratic or communist systems (e.g. presidential or constitutional systems). All data were analysed. It involved parliamentary elections to national parliaments in European countries between 1900 and 2020. Where there are two chambers of parliament, the analysis focused on the results of elections to the lower chamber (the House of Commons). Due to specific and different electoral systems and cross-cultural differences, presidential, upper house and regional elections were not included. The research analysed election results in all European countries during the period, including the Communist Bloc from 1948-1989. The research examined the absolute frequency of occurrence of all elections, because the proportion of European states has gradually increased since 1900 (average frequency analysed).

In most European countries, access to the lower chambers of parliament is limited by a mandatory minimum threshold (usually 5% of a political party's profits). Therefore, this research looked at the outcome of entering parliament. That is, only those political parties that were elected regardless of the percentage gain they had to meet in each election. A key data source was open historical databases on the conduct of parliamentary elections in different European countries, considering published political science studies on parliamentary

elections (Caramani 2000; Siaroff 2018; Casal-Bértoa and Enyedi 2021). Other data sources were open databases on European electoral history and political parties (ParlGov project 2024; Parties and Election 2024; IDEA report 2024). These databases provided input data on the average number of political parties in European parliaments and the average number of parliamentary elections in each year. These data have been further analysed. The graphical result of the research is presented in Graph 1.

GRAPH 1: NUMBER OF PARLIAMENTARY PARTIES AND NUMBER OF ELECTIONS PER YEAR IN EUROPE 1900-2020



Source: Own processing.

The statistical analysis of the data focuses on the calculation of correlations. The research measured the statistical correlation between two variables: the number of parliamentary elections (1) and the number of parliamentary parties in national parliaments (2). The statistical method used was the Pearson correlation test. The results of the analysis show that there is a correlation between the two elements. The calculation of the correlation is shown in Table 1.

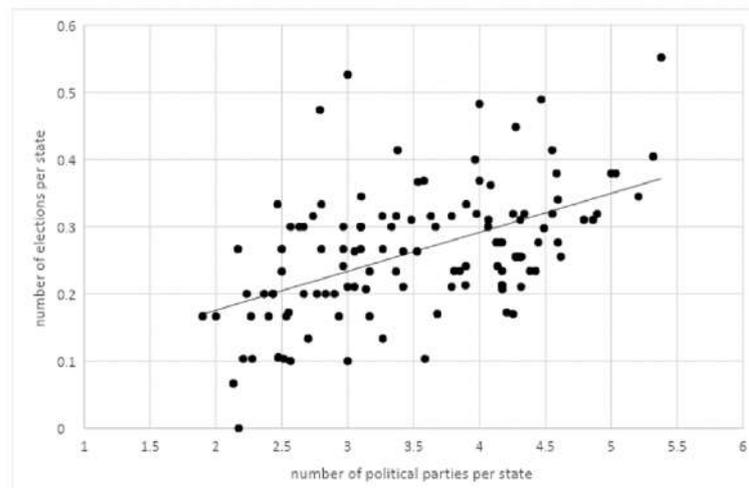
TABLE 1: CALCULATION OF STATISTICAL CORRELATION ANALYSIS

Correlations between variables		Pearson Correlation	Significance
Number of political parties per state	Number of elections per state	0,512	<0,001

Source: Own processing.

Total correlation over the whole period (with normality test). Significant (<0,001) moderately strong (0,512) correlation between number of political parties per state and number of elections per state. The scatterplot with a linear regression line can be seen in Graph 2.

GRAPH 2: DISTRIBUTION OF INDIVIDUAL VARIABLES SHOWING CORRELATION



Source: Own processing.

For the period 1919–1990, the highest correlation is 0.655. Significant (<0.001) moderately strong (0.655) correlation between the number of political parties per state and the number of elections per state. Scatterplot with fitted cubic curve (coefficient of determination $R^2 = 0.442$). This dependence suggests a closed cycle in the dynamics of social emotions. This period is consistent in the length of measurable social change with theory of *the short century* (Hobsbawm 1994), *long social cycle* (Modelski 1987; Goldstein 1988) or the period of a person's average age as a specific cultural cycle (Halberg et al. 2004; Páleš 2009). The stronger correlation of higher social emotion dynamics in parliamentary elections is consistent also with the theory of social emotions measured on century time series within cliodynamics (Turchin 2018). The literature on party politics and party systems has advanced several relevant claims. One advanced the 'freezing hypothesis', which essentially posited that the party systems of the 1960s resembled those of the 1920s due to the absence of change in the cleavage structure (Lipset and Rokkan 1967).

5 DISCUSSION

The presented statistical analysis demonstrates that social emotions can be examined also from the results of parliamentary elections. The research findings indicate a statistically significant correlation between the frequency of parliamentary elections and the number of political subjects elected to national parliaments in Europe between the years 1900 and 2020. This indicates that this statistical link was most pronounced during the so-called 'short century' (1919–1990). The social emotions may not be as prominently expressed through these phenomena in the present era as they were during the period under examination. The role of social media in influencing voter decision-making is evolving (Brady et al. 2019), as are new political marketing strategies. Contemporary political parties are fielding candidates in coalitions comprising entities that previously operated independently. Predominantly protest parties are uniting several smaller political entities (Electoral Fusion).

The frequency of elections also has implications for voter turnout (Garner et al. 2021). As the frequency of parliamentary elections increases, voter turnout decreases. Consequently, according to sociological conflict theory, accumulated civic discontent filters through and the dynamics of social emotions decrease

(Garman 2017; Kostelka et al. 2023). The number of elections is associated with the intercultural dimensions of each national culture. It is therefore evident that the presented research methodology cannot be overestimated. Nevertheless, it introduces new perspectives to the investigation of social emotions. In general, conservative approaches, which emphasise stability, longevity, tradition, credibility and expertise, are preferred in this area of political marketing. One of the primary political principles of nation-state governance is the dampening down of the uncontrollable dynamics of social emotions. Early elections are often a protest expression of dissatisfaction with the incumbent government (Daoust and Péroquin-Skulski 2020; Turnbull-Dugarte 2022).

The literature on party organisation has highlighted the fact that such organisations have undergone significant evolution over time. Furthermore, any modification to the structure of the entities must be accompanied by a shift in voter preferences. In accordance with this, Katz and Mair (1995) identify four distinct categories of political parties: cadre parties, mass integration parties, catch-all parties, and cartel parties. The identity of voters and their political party affiliations evolve over time, as do their preferences (Schulman and Pomper, 1975; Broug and Kritzingler 2012). The catch-all or cartel parties have a significantly diluted ideological connotation. This indicates that they no longer appeal to voters based on identity. As parties become increasingly de-ideologized, voters' electoral behaviour becomes more fluid. New parties emerge to intercept the preferences of these less ideological voters, and the number of parties increases. Consequently, the growth in the number of parties is no longer as closely tied to the frequency of elections as it had been in the past.

The inverse relationship between the frequency of elections and voter turnout may be explained by a simple equation: more frequent elections result in lower voter turnout, which in turn leads to an increase in the number of political parties represented in parliament. This equation demonstrates the expansion of parties, particularly with smaller electorates, as voter turnout declines. In such cases, minor parties are more likely to secure a parliamentary seat than they would otherwise be.

The social emotions expressed through parliamentary elections have undergone a transformation in the wake of the global pandemic caused by the Covid-19. In response to this unprecedented crisis, governments have altered the conventional methods of enacting legislation within parliamentary frameworks, resorting to emergency decision-making procedures. This has resulted in a significant alteration in the frequency of elections and the principles espoused by political parties. The impact of external factors on voter turnout demonstrates how socio-economic conditions can influence electoral dynamics. Higher incidences of the virus near election dates have been observed to decrease voter turnout, while incidents further away have been found to have the opposite effect (Constantino et al. 2021).

The relationship between the frequency of parliamentary elections and the number of political parties has been demonstrated to be most pronounced between the years 1919 and 1990. The development of modern information technology in the political marketing changes the strategies of political parties. The method of forming joint parliamentary candidates from different political parties is undergoing a transformation, has resulted in a weakening of the statistical link (Graph 1). Nevertheless, the research results can be seen as an interdisciplinary contribution to the way social emotions are studied.

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PARLAMENTARNE VOLITVE IN DRUŽBENA ČUSTVA: KVANTITATIVNA RAZISKAVA IZ EVROPE 1900–2020

Prispevek predstavlja izsledke raziskave o parlamentarnih volitvah v Evropi od leta 1900 do 2020, opravljene v nacionalnih parlamentih evropskih držav. Pogostost volitev se preverja glede na število političnih strank, izvoljenih v parlament, pri čemer se za vsako leto izračuna povprečna korelacija. Rezultati kažejo na povezavo med tema pojavoma. Korelacija je bila testirana s Pearsonovim testom. Prisotnost večjega števila parlamentarnih političnih strank in pogostejše volitve lahko štejemo za indikatorja kolektivnih družbenih čustev. Prispevek predstavlja nove perspektive raziskovanja sociologije čustev oziroma politike čustev. Nadalje avtor raziskavo dopolnjuje s podrobno statistično analizo obdobja, v katerem je korelacija najbolj izrazita (1919–1990), kar ustreza teoriji kratkega dvajsetega stoletja.

Ključne besede: parlamentarne volitve; politične stranke; družbena čustva; kolektivna čustva.



THE UNION CIVIL PROTECTION MECHANISM IN THE PRISM OF SOLIDARITY THEORY

Marjan MALEŠIČ¹

The presented analysis leads to a conceptual discussion of solidarity and empirical findings concerning solidarity behaviour in disasters. Selected academic articles are analysed and contrasted with the EU's structural solutions and functional experiences in the field of disaster solidarity. In the liminal period of a disaster, emerging actors spontaneously, collectively and altruistically provide assistance to victims. They act based on shared values and norms and ignore pre-disaster normative social differences and behaviours. Ethical dimensions and emotions are also crucial for solidarity behaviour. This solidarity is then reinforced by local, national and in some more serious cases even international actors. One of these is the Union Civil Protection Mechanism (UCPM), which provides regional and global assistance. The solidarity of the UCPM is mechanical, organic and based on a case-specific mix of generosity, morality, rationality, reciprocity, identification, connectedness and interdependence. The UCPM has functional goals and political motives.

Key words: solidarity; disaster; Union Civil Protection Mechanism; actions.

1 INTRODUCTION

In recent years, the debate on solidarity has gained momentum. Authors dealing with the concept of solidarity mainly find the basis for discussion in Durkheim's concepts of mechanical and organic solidarity. The discussion concerning the reasons, motives, content, scope and forms of solidarity is quite controversial, causing several disagreements. Nevertheless, we agree with Forst (2021, 13), who argues that "solidarity appears in many forms and with many justifications and reasons. One must not limit this plurality but must describe it properly".

Solidarity is especially important in the context of the individualisation and globalisation of today's society. While individualisation suggests that people

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could be more rational and more selfish in their everyday lives, globalisation, in contrast, makes the world more interconnected and interdependent and brings with it greater opportunities for human cooperation and solidarity compared to the past. For example, the European Union (EU) has developed a civil protection cooperation programme that gives assistance not only to its members and partners, but also to other countries severely affected by various crises².

The objectives of the analysis are to summarize conceptual discussions on solidarity, introduce specific forms of solidarity exercised during a disaster or other crisis, and evaluate the role played by the Union Civil Protection Mechanism (UCPM) in this context. We begin with a theoretical elaboration of the concept of solidarity and continue with a presentation of recent research on solidarity in disasters. The UCPM's solidarity programme, its basic activities and actual actions are analysed next. In the discussion, the UCPM is assessed and evaluated in the light of solidarity theory and empirical evidence. The analysis is rounded off with concluding remarks in the form of answers to research questions.

The analysis was guided by three research questions: 1) What are the biggest conceptual differences and perhaps controversies among scholars while explaining solidarity? 2) What are the main findings of recent research on solidarity in disasters? 3) To what extent are the characteristics of UCPM and its disaster help in line with the conceptual foundations of solidarity?

To accomplish the analytical objectives and answer the research questions, selected academic articles and research reports on solidarity in recent disasters were analysed. We also analysed the data available on the EU's websites and compiled a list of 536 UCPM actions in the last decade (2014–2023). We processed the data to determine the number of actions per year, the number of actions per disaster/crisis type, the geographical scope of the actions, and the type of assistance offered to the affected countries. Two cases were analysed and briefly described in this article to point out the UCPM's advantages and deficiencies. We compare empirical findings about the EU's structural solutions and activities in the area of disaster relief with the central theoretical propositions on solidarity. Finally, a synthesis of the main findings is presented.

2 THEORETICAL AND EMPIRICAL INSIGHTS

2.1 Conceptualisation of solidarity

Most authors who recently considered the topic of solidarity (e.g. Borger 2020; Wilde 2007; Komter 2004; Stjernø 2004; Brunkhorst 2005; Forst 2021; Sangiovanni and Viehoff 2023) went back to the concept developed by Emile Durkheim (1964), who distinguished between mechanical and organic solidarity. Mechanical solidarity refers to the social integration of members of a society who share a common identity, values, beliefs, morals, faith and way of life. They are similar and form a collective conscience that works within the individual members and encourages them to work together. The concept applies to small units like the family, tribe, church, neighbourhood and local community. Organic solidarity, in comparison, is a social integration that arises from the need of

² As the EU officially adopted the UCPM's all-hazards approach in 2013, it makes sense to adequately use the terms "disaster" and "crisis" in the text.

individuals for mutual fulfilment. It refers to more developed and complex societies with more differentiated identities and beliefs, a more abstract morality enshrined in law, and a greater division of labour. Alongside Durkheim, some authors (e.g. Borger 2020; Komter 2004) also mention Aristotle's concept of friendship³, Rousseau's concept of the social contract, Weber's communal and associative social relations and Parson's concept of solidarity as a normative obligation in this context. Yet, it is necessary to stress that Durkheim's and Weber's concepts of solidarity mentioned above were understood as "ideal types". The distinction between them was made purely for analytical reasons, whereas in reality mechanical and organic solidarity or communal and associative relations exist simultaneously in one and the same society (Komter 2004).

The general notion of solidarity refers to a practical attitude of an individual towards other people, and "involves a form of 'standing by' each other (from the Latin *solidus*⁴) based on a particular normative bond with others constituted by a common cause or shared identity" (Forst 2021, 3). Solidarity expresses the willingness to act with or for others to reaffirm the collective bond. It is also an endeavour to promote the common cause or shared identity of a given social group when necessary. Sangiovanni and Viehoff (2023, 3) state that there are two preconditions for solidarity: an individual identifying as a member of a social group together with a willingness, on that basis, to put aside narrow self-interests to help another.

Solidarity is also a mechanism of social cohesion (Borger 2020). This mechanism has three core characteristics: solidarity mediates between the community and the individual, solidarity creates unity, and solidarity requires the individual to act in support of and in accordance with the group. Borger (ibid.) distinguishes three types of solidarity: social, welfare state and oppositional⁵.

The concept of solidarity refers primarily to the individual level and the collective or community level. Solidarity on the individual level is defined as "a feeling of togetherness or identification with another person or group, and the willingness to take the consequences of that". It is hence a disposition of a person in terms of their "propensity to sacrifice something on behalf of the group which suffers from an adverse condition" (Komter 2004). Solidarity on the collective/communal level emphasises "the ties that bind people together in the society; the term solidarity is referring to the degree or type of social integration resulting from these ties and is often used as a synonym of the social order or social cohesion existing in the society" (ibid.). This sociological perspective is strongly influenced by Durkheim's concept of organic solidarity.

Similarly, solidarity can be understood as "the feeling of reciprocal sympathy and responsibility amongst members of a group which promotes mutual support" (Wilde 2007, 1). Solidarity on the individual level can contain subjective and emotional elements and is associated with love and friendship. However, solidarity on the societal level involves collective action that helps to shape

³ Aristotle distinguishes three types of friendship: a friendship of utility, a friendship of pleasure and a perfect friendship. The latter is closest to the concept of solidarity and is "made up of men who are good and alike in virtue; for each alike wishes well to each other... they are good in themselves" (quoted by Prather, 2024).

⁴ The Latin verb *solidare* means to make solid, to join parts into a strong whole (Forst 2021, 3).

⁵ Oppositional solidarity is political in nature: it is a movement for social change that can take place on many levels of social existence. It opposes injustice, oppression, tyranny and social weaknesses (Scholz 2008, 54).

institutions and policies within states and beyond, especially in the era of globalisation.

Modern social systems consequently introduce various forms of institutionalised solidarity (social welfare, social insurance, healthcare, disaster relief programmes etc.). In this sense, Sciarra (2018, 2) defines solidarity as “ways in which collective interests emerge and are represented by organized groups at a national and transnational level”. Taylor and Hunt-Hendrix (2024) argue that “solidarity is both a principle and a practice, one that must be cultivated and institutionalised so that care for the common good becomes the central aim of politics and social life”. Stjernø (2004, 2) defines solidarity as “the preparedness to share resources with others by personal contribution to those in struggle or in need through taxation and redistribution organized by the state”. A certain form of solidarity reciprocity is assumed, as it is “generally accepted that those in need will receive more benefits than those who are not in need” (Forst 2021, 9).

Still, a strong belief exists among analysts that solidarity presupposes intrinsic motives and voluntary action. Solidarity must be located outside the legal framework of duties and obligations. In this spirit, Calhoun (2002) criticises the purely institutional or political perspective of solidarity that ignores a variety of other forms of solidarity that are achieved outside of state and political organisations, while overestimating the mobilising potential of big institutional ideas. Honneth (1996, 128–129), too, emphasises the social dimension of solidarity: it is “an interactive relationship in which subjects mutually sympathize with their various ways of life because, among themselves, they esteem each other symmetrically”. Social solidarity exists when “every member of society is in a position to esteem himself or herself”.

The concept of solidarity is linked to terms like generosity, reciprocity, rationality, dependence, identity and morality. Is giving completely generous or does it require reciprocity? Is it interest-free or do people expect something in return? Are generosity and self-interest linked in gift-giving, and does the exchange thus entail a mixture of altruism and selfishness? Building on the research of Malinowski, Mauss, Levi-Strauss, Gouldner and Sahlins, Komter (2004) concluded that reciprocity in exchange relationships is the moral cement of culture and society and thus a cornerstone of social order and solidarity. In this context, O’Neill and Miller (cited by Sangiovanni and Viehoff 2023, 2) distinguish two types of solidarity: solidarity among and solidarity with. *Solidarity among* presupposes the attitudes and dispositions of group members are roughly symmetrical, while *solidarity with* refers to a relationship between (groups of) individuals who do not belong to the same unit. Reciprocity is not expected here, even though people who extend solidarity to those in need might generally expect others to help them should in the future they find themselves in a similar situation. Kolers (2016) claims that solidarity must always be one-sided and asymmetrical. Forst (2021, 4) argues in comparison that a certain reciprocity exists in solidarity, albeit it sometimes is asymmetrical.

Solidarity is additionally discussed within the framework of rational choice theory (Hechter 2015). The belief is that, when given a choice, people will always choose the alternative likely to bring them the greatest benefit. The individual is always goal-oriented and a rational egoist, but the institutions, with their regulatory function, retain control over their behaviour. Another important variable is the individual’s dependence on the group. Individuals weigh up their commitment to the group, the alternative of leaving the group, and the costs of

choosing an alternative. Komter (2004) contends that the greater the dependence of the members, the stronger the bond and obligation to the group. Solidarity is achieved when people are committed to the group's goals. "Compliance requires formal controls, the means of the group to counteract free riding" (ibid.).

Some authors do not see the connection between rationality, dependence and solidarity as critical and instead highlight the importance of norms, values and emotions as the foundations of solidarity. Mayhew (1971), for example, believes that people's solidary behaviour is organised in social groups such as the family, ethnic group, religious group, a group of colleagues and even the nation, which create a system of solidarity. People are attracted to the group, care for its unity, are loyal to, identify with and feel connected to it. These are all forms of solidarity within the group. Etzioni (1998) also rejects neoclassical paradigms that put forward rationalistic, utilitarian and individualistic features of human nature. He offers an understanding according to which people are committed to the community and share a common identity and common values. This means people often make decisions that are not rational, but affective and normative. People not only strive to maximise their pleasure or benefit, yet also act on the basis of shared values and norms. Similarly, Forst (2021, 5) believes that an individual values the cause or identity of a social group for certain normative reasons. Specific values are embodied in the community with which the person identifies. The reasons for solidarity are hence a combination of independent evaluative considerations and an attachment to a given collective to which a person belongs.

Morality is also key in this context because solidarity is based on our humanity in various forms: From morally obligatory help in times of need to acts of solidarity that do not require reciprocity at all. Morality enables us to recognise other people as vulnerable beings whom we must assist when needed given that we all share "a human form of life" (Habermas 1989). It is also important that we care for other people even though we do not share a particular form of life or a common identity with them. Rorty (1989) argues that our moral obligations to others stem from our shared identity and not so much from our shared humanity. Sangiovanni and Viehoff (2023, 7) claim that moral solidarity requires citizens to identify with one another in shared responsibility for the welfare of the social group. Notions of solidarity vary since the meanings of common bond, common identity and common cause are different. This makes the practical context important (Forst 2021, 7), and it can be an ethical, legal, political and/or moral context.

2.2 Empirical evidence

Recent research on disaster solidarity has yielded several interesting findings. First, and most importantly, solidarity comes in different forms (see Sangiovanni and Viehoff 2023; Drury et al. 2016; Schrauf and Rodriguez 2023; Albris 2023; Koopman 2021; Remes 2015; Sasse-Zeltner 2021; Hutchison 2014 and Zille 2020). In the initial phase of a disaster, considerable help is offered to victims by emerging actors who have not been badly affected. People's behaviour is guided by a strong ethical dimension in which disaster survivors spontaneously, collectively and altruistically help those in need. In helping others, they ignore normative social distinctions and behaviours from before the disaster. People do not seek to maximise their benefits, but act based on shared values and norms. Nonetheless, it seems that generosity and self-interest are intertwined in the exchange of help and promote the development of social order and solidarity. It

is also important to stress that solidary behaviour during a disaster is related to social identification, the observation of the solidary behaviour of others, and expected support. This means there is substantial solidarity among the affected individuals or groups, but also a lot of solidary behaviour emanating from the outside world: nationally, regionally and in some more serious disasters even globally. In disasters and other crises, the context is specific, and people often assist those affected, even if they have nothing in common with them, except for the mere fact that we are all *homo sapiens* who uphold humanity. As Sasse-Zeltner (2021) noted, the COVID-19 crisis, for example, triggered an outbreak of institutional solidarity on the national and international levels and simultaneously also revealed new forms of solidarity in local communities.

Solidarity and the overall success of disaster relief are enhanced when existing concepts of mutual aid are already established in society. Following an earthquake in Indonesia, the mobilisation of survivors, formation of leadership and effectiveness of the response were all supported by the traditional norms and rules of the “gotong royong” concept⁶ (Koopman 2021). This also contributed to the quick recovery through friendship, transparency and trust between different religious groups and villages. A research report on two Canadian historical disaster cases underscored the role of self-help patterns, informal order and solidarity in coping with the consequences of disasters (Remes 2015). Both, the Indonesian and Canadian cases showed that the neglect of traditional concepts of solidarity or their modification, not in the sense of valorisation but of distortion, led to serious difficulties in coping with the disasters.

Emotions have played an important role in the provision of transnational solidary aid, revealing that emotions are linked to contemporary humanitarianism. Images of devastation, loss of life, injury and general human suffering have evoked solidarity and provided aid. In rare cases, solidarity has been reported to be offered through the mobilisation of stereotypes and colonial experiences of the Third World (Zille 2020), which suggest a “politics of pity” (Hutchison 2014).

Recent research has also shown that the normalisation of the post-disaster situation stimulates pre-disaster behaviour, meaning that solidarity diminishes while traditional patterns of interaction between people are gradually restored. Yet, there are individuals who commit themselves ethically in the event of a disaster and consequently engage in solidarity as a long-term behaviour (Schrauf and Rodriguez 2023). This means that in some cases solidarity can have a deeper and lasting moral impact on society as a whole. It should also be noted that no cases of purely rational or selfish behaviour have been identified in recent research. Nor can it be said that aid via solidarity mechanisms was chiefly motivated by the self-interest of the donor countries. The above overview is principally concerned with solidarity as an expression of mutual aid between people in an affected community. In a few cases, it also deals with (international) institutionalised solidarity. The latter is examined in detail in the next chapter.

⁶ This concept stands for traditional cooperation in communities and practical inter-personal help. The concept emphasises the importance of collaboration, solidarity and the spirit of helping other people.

3 THE UNION CIVIL PROTECTION MECHANISM AS A SOLIDARITY PROGRAMME

The processes of globalisation and regional integration make it possible to implement institutional solidarity in a regional and global context and not only in the context of the nation state, as happened in the past. This is an opportunity for new forms of solidarity that can be linked to the process of democratisation and the affirmation of humanism. The core international structures for solidary assistance in the event of a disaster or other crisis are the United Nations Offices for the Disaster Risk reduction (UNDRR) and for the Coordination of Humanitarian Affairs (UN OCHA), the NATO Department for Resilience and Civil Preparedness, and the Euro-Atlantic Disaster Response Coordination Centre (EADRCC) within it, together with the Union Civil Protection Mechanism (UCPM). The latter is a form of solidarity that reaches far beyond EU membership – it involves non-EU members of the UCPM, but also countries around the world that are assisted during various crises. It is international or even cosmopolitan solidarity provided by a supranational organisation. EU solidarity also extends to various other areas and forms, although focus in this article is on solidarity in the event of disasters or other crises⁷.

3.1 Chronology of the UCPM's development

Even though the EU Civil Protection Mechanism was established in 2001, the beginnings of cooperation between EU Member States in providing disaster relief date back to 1977 when a fund to financially assist affected countries was set up. In April 1985, the ministers responsible for civil protection met informally in Rome and agreed to coordinate national civil protection capacities in the event of major natural disasters. Gradually, the European disaster relief programme was implemented, which included advanced forms of cooperation: the development of a common disaster management strategy, civil protection instructions, a permanent network of national civil protection officials, a database on disasters, joint training and simulation exercises, and a public information campaign (Malešič 1991). In 1997, the Council adopted a decision on a Community action programme in the field of civil protection to support and complement the Member States' activities on the national and sub-national levels via cooperation projects relating to preparedness, the dissemination of information, and public awareness of natural and technological disasters. Cooperation in the area of civil protection is intended to promote solidarity, protect the environment and improve effectiveness in the Member States by applying the subsidiarity principle⁸ (Villani 2017, 126–128).

⁷ Villani (2021) provides an overview of the so-called EU civil protection law and an assessment of its details, evaluating the essential practical and theoretical role of solidarity in shaping the main legal instruments for civil protection within the European Union. Particular attention is paid to the existing instruments for the provision of financial and in-kind assistance in the event of a disaster, as well as analysing recent initiatives to provide assistance for dealing with the consequences of the COVID-19 pandemic.

⁸ The subsidiarity principle means that the responsibility for disaster relief lies primarily with the states themselves, while the EU supports, complements and facilitates the coordination of their efforts. The EU endeavours to strike a balance between national responsibility and European solidarity.

In October 2001, the Council adopted a decision and launched the EU Civil Protection Mechanism⁹ to facilitate enhanced cooperation between the Community and the Member States in the field of civil protection in the event of major emergencies. This was an important milestone in the development of cooperation in disaster response. The mechanism was an operational tool to mobilise assistance, improve preparedness and organise cooperation. The key element of the mechanism was the Monitoring and Information Centre (MIC), a hub for communication between Member States. Not only intended for the EU Member States, the mechanism could also be used to support third countries when affected by a major disaster. The Civil Protection Mechanism became an important tool for the EU to ensure immediate and coordinated disaster relief (Villani 2017, 128).

In 2002 we witnessed the establishment of the EU Solidarity Fund that is used to respond to major natural disasters and express European solidarity and support to disaster-stricken regions within Europe. It has become one of the main EU instruments for post-disaster recovery. In the 2009 Lisbon Treaty, a specific provision on disaster response was adopted in the form of a “solidarity principle”: The commitment of the EU to provide assistance, relief and protection to victims of natural or man-made disasters around the world, and in the form of a “solidarity clause” to support and coordinate the civil protection systems of the Member States, which provides that the latter are obliged to show solidarity and assist another Member State if it is affected by a terrorist attack or a natural or man-made disaster (Lisbon Treaty 2009). The Treaty introduced a formal legal basis for civil protection as a competence of the Union, meaning that activities in case of the solidarity clause being activated are led by the Council, whereas activities in case of activation of the Civil Protection Mechanism are led by the Commission.

The last decade has been decisive for the development of EU civil protection. In December 2013, the existing framework was upgraded with the Union Civil Protection Mechanism (UCPM). This mechanism can be activated in the event of any major natural or man-made disaster affecting people, the environment or cultural heritage. Events can include terrorist attacks, technological, radiological or environmental disasters, marine pollution, and acute health emergencies. Such an all-hazards approach emphasises prevention, preparedness and effective response, while post-crisis reconstruction has not been the focus of the UCPM (Villani 2017, 132–134). As mentioned above, this is the domain of the EU Solidarity Fund.

At the same time, the Emergency Response and Coordination Centre (ERCC) was established on the basis of the existing Humanitarian Aid Crisis Room and the Monitoring and Information Centre to serve as the operational centre of the UCPM. The ERCC gathers information in real time, monitors the evolution of disasters, prepares plans for resources deployment, works with members to identify appropriate civil protection capacities and coordinates the EU’s civil protection assistance. In 2021, the ERCC was upgraded with operational, analytical, monitoring, information and communication capabilities (Emergency Response Coordination Centre 2024).

⁹ Today, in addition to the EU Member States, Iceland, Norway, Serbia, North Macedonia, Montenegro, Albania, Bosna and Herzegovina, Moldova, Ukraine, and Turkey participate in the Mechanism.

Another important milestone was the creation of the European Emergency Response Capacity (EERC) in October 2014 (Decision of the European Parliament and of the Council on a Union Civil Protection Mechanism 2013). The EERC is a voluntary pool of pre-committed resources from the countries involved in the civil protection mechanism. The EERC includes modules (water treatment, surgical units, medical evacuation procedures, aerial and ground forest firefighting, flood mitigation, urban search and rescue), technical and practical assistance teams and experts in various fields. These modules enable Member States to respond to disasters immediately after being contacted by the Emergency Response Coordination Centre. A weak point of the previous system was that it facilitated the use of ad hoc resources provided by countries. There is no doubt that the mobilisation of resources is much easier and faster if they are made available to the mechanism in advance by the participating countries.

In December 2018, the UCPM was amended, bringing three main changes:

- 1) greater obligations for Member States in the area of prevention. They should extend reports on risk assessment and risk management plans, and report on prevention measures and preparedness;
- 2) changes concerning the Commission's responsibilities in the areas of preparedness and response. The dual system of capabilities was introduced: The EU Voluntary Pool was transformed into the European Civil Protection Pool (Decision (EU) 2019/420) and reserve capacities-rescEU (Decision (EU) 2019/420) were created, as managed by the Commission in conjunction with the host country's reserve capacities; and
- 3) a significant increase in funding allocated to civil protection occurred. A rise of EUR 280 million in 2018–2020 and a favourable budget for 2021–2027 were agreed upon (Dobnik Jeraj and Martinič 2019, 260).

It is important to note that the EU recently developed a 'balance mechanism': Countries that frequently request assistance for the same type of disaster are invited by the Commission to submit additional information on prevention and preparedness measures. If necessary, the Commission can propose to send teams of experts to the country to draw up a proposal with recommendations. The same provision applies to countries requesting disaster assistance for 3 years in a row (ibid.).

In December 2021, the Union Civil Protection Knowledge Network was launched as an instrument of the UCPM (Regulation (EU) 2021/836). It was set up to strengthen the efficiency and effectiveness of civil protection training and exercises, promote innovation and dialogue, and enhance cooperation between Member States' national civil protection authorities. The Knowledge Network is a hub that connects first responders, disaster risk managers, scientists and decision-makers and matches their needs for expertise and best practices with methodologies, tools, solutions and resources (Union Civil Protection Knowledge Network 2024).

Humanitarian action and civil protection have been organisationally linked under the umbrella of the Directorate-General for Civil Protection and Humanitarian Aid (ECHO) since 2010. This framework should enable complementary crisis management of both areas, aiming to increase the efficiency of activities, raise crisis response to a higher level, improve society's resilience to crises, provide the framework for cross-sectoral integration, and promote resilience in crisis response in international fora (Foreign and Security Policy 2022).

3.2 Recent UCPM actions of solidarity

Any country in the world can request assistance from the UCPM when affected by a major crisis. Between 2014 and 2023, the Mechanism participated in at least 536 actions (Table 1)¹⁰. Interventions have included some of the most devastating and challenging disasters and other crises like the Ebola virus disease in West Africa (2014) and the Democratic Republic of Congo (2018), the earthquake in Nepal (2015), the migrant crisis in Europe (2015–2016), forest fires in the Mediterranean (2017), in Greece (2018), in Sweden (2018) and in Austria (2021), the explosion in Beirut (2020), floods in Ukraine (2020), earthquake in Croatia (2020), refugee crisis in Jordan (2020), COVID-19 (2020–2021), the war in Ukraine since 2022, earthquakes in Turkey and Syria (2023), floods in Slovenia (2023), and a myriad of other disasters (Union Civil Protection Mechanism 2024). The COVID-19 pandemic saw the mechanism being activated around 100 times each in 2020 and 2021 (EU Civil Protection Mechanism 2024). Various emergency medical teams, which form part of the European Emergency Response Capacity, were deployed, initially in northern Italy and later in Armenia and other countries.

TABLE 1: NUMBER OF UCPM ACTIONS PER YEAR IN THE LAST DECADE

2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
26	25	32	43	29	23	100	110	95	53
<i>TOTAL 536</i>									

Source: own presentation based on the EU's websites.

The number of UCPM actions per year depends on several factors, including the number of disasters per year, the number of disasters that overwhelm the capacities of the affected countries, the number of requests for assistance and the available civil protection and other capacities of the EU. Table 1 shows the average number of UCPM actions per year over the last 10 years has been 54, with the majority of actions occurring in the last 4 years and the average number of actions reaching 91. This is an obvious consequence of the COVID-19 outbreak, which caused a pandemic of huge proportions, notably in 2020 and 2021. Nevertheless, only 35 and 9 actions were related to COVID-19 in 2022 and 2023 respectively, meaning in those years there were 60 and 44 other actions. This is much higher than the average for the first 6 years of the decade (30 actions). The increase is chiefly due to civil protection assistance to Ukraine, which is a victim of Russia's aggression.

TABLE 2: NUMBER OF UCPM ACTIONS BY DISASTER/CRISIS TYPE

Contagious diseases	Natural disasters	Environmental disasters	Migrations/refugees	Repatriation/Evacuation	Conflict/War	Preparedness	Other disasters
223	206	26	24	21	14	12	10
<i>TOTAL 536</i>							

Source: own presentation based on the EU's websites.

Actions in response to outbreaks of infectious diseases were the most prevalent in the last decade (Table 2). This is largely due to COVID-19, yet there have also been cases of Mpox, Ebola, yellow fever, cholera and several other diseases. Natural disasters have also dominated the past decade. Fires (90), floods (46), earthquakes (26), cyclones (23) and volcanoes (8) were the most frequent events triggering EU aid in this category. The number of disasters producing a direct

¹⁰ There is no single, standardised list of UCPM actions. Our list is the result of a search and extraction of data and information from various EU websites.

negative impact on our environment totalled 26, while mass migrations and refugee crises required 24 EU interventions. The repatriation of EU citizens due to COVID-19 and evacuations due to various conflicts involved 21 actions. Fourteen actions were directly related to situations caused by armed conflicts or wars, while 12 actions were dedicated to improving countries’ preparedness for various disasters.

TABLE 3: GEOGRAPHICAL SCOPE OF THE UCPM’S ACTIONS

Europe	Africa	Asia	Central and South America	North America	Australia and Oceania	Middle East
255	85	78	71	1	17	29
<i>TOTAL 536</i>						

Source: own presentation based on the EU’s websites.

Table 3 shows that UCPM actions have been spread across the world in the last decade. Although the main focus of the UCPM has been Europe itself (255 actions), over half of the actions have been carried out on other continents, mainly in Africa (85), Asia (78) and Central and South America (71), but also in Australia and Oceania (17) and the Middle East (29). The United Nations has a programme for disaster relief that is implemented by the UN Office for the Coordination of Humanitarian Affairs. In addition, there are bilateral and regional agreements for mutual assistance in the event of disasters, further increasing the EU’s contribution to people in need and reflecting the EU’s global solidarity. Assistance for North America has only been requested and provided once, in the case of the forest fires in Canada in 2023.

The analysed cases show that the forms of aid provided by the UCPM during disasters include material resources (food, water, medicine, clothing, tents, water pumps, mobile generators, heavy construction equipment, trucks, excavators...), experts, medical teams, rescue units, services and their equipment, airports and means of transport for the delivery of aid, as well as financial resources.

We now briefly present two recent UCPM actions. In 2020–2021, the mechanism responded to around 200 requests from around the world regarding the COVID-19 virus, but already in the initial phase of that crisis, when Italy was the first EU Member State severely affected by the virus to ask for help, not a single member responded positively to the request. It was only the intervention of the Commissioner for the Internal Market that prompted Germany and France to assist Italy. The latter, however, was then helped by non-European countries (China, Cuba, even Venezuela) and the Russian Federation. This fact triggered a discussion in political and academic circles about the flow of information and transparency within the UCPM (Beaucillon 2020, 400), European solidarity, the understanding of “realpolitik”, geopolitics, and the image of the EU. In the following months, the EU successfully responded with appropriate measures to combat the devastating consequences of COVID-19. Measures were introduced in the areas of public health, research, the economy, food, travel, education, and pandemic exit strategy (De Pooter 2020, 1 and 4–7).

Slovenia was hit by devastating floods on 4 August 2023. Two days later, the country requested assistance from the UCPM. While 11 countries used this mechanism to help Slovenia, some others used bilateral agreements or the mil-to-mil (military-to-military) programme. In total, 18 countries provided assistance to the country, some through more than one mechanism. Five of them were non-EU member states and two were not even members of the UCPM. In total, 10 helicopters, 32 heavy machines, 14 temporary bridges, 729 rescue

workers and about €640,000 in financial resources were collected to help Slovenia. On the other hand, the European Commission provided €428.4 million from the Solidarity Fund for the reconstruction of the destroyed landscape, infrastructure, houses, businesses etc. Already in 2023, an advance payment of €100 million was made, with the rest to be transferred by the end of 2024. The President of the European Commission came to Slovenia on 9 August 2023, visited some of the affected areas and delivered a speech in the Slovenian Parliament in which she expressed her sorrow, sympathy, gratitude to the rescuers and compassion, and promised financial help from the EU. According to available data, there was no criticism of the UCPM measures during the floods in Slovenia and they may be labelled as a 'good practice' case. Decision-making was quick, the aid was timely, adequate and comprehensive.

4 DISCUSSION

A review of the European Union Civil Protection Mechanism in the light of the initial theoretical foundations of solidarity offers some useful insights. If we separate Durkheim's categorisation of solidarity into mechanical and organic types, or Weber's communal and associative relations in society, we could argue that solidarity through the UCPM works within all of the above types given that assistance is offered in the event of disasters or other crises in the affected countries, within the EU as a whole, within the UCPM membership beyond the EU membership, but also regionally and globally. In addition, the EU promotes mutual assistance on individual, group, community and institutional levels.

Aid under the UCPM involves a mix of concepts like generosity, morality, reciprocity, identity, connectedness and interdependence. It is undoubtedly generous to offer help to people affected by a disaster, especially when the recipient countries are not members of the UCPM. Still, it is at same time also a moral duty because those who are able to do so should not stand idly by and watch the disaster unfold. We believe that the concept of morality is the key to understanding solidarity in disasters and other crises. And that this morality stems from a common identity and a common humanity (institutions, organisations, groups and individuals helping those affected in different parts of the world).

Reciprocity is also, at least in part, an issue to be considered in the context of disaster solidarity. It is not expected that developing countries assisted in a disaster will be able to reciprocate to the same extent should developed donor countries become affected. In this context, solidarity under the UCPM is largely one-sided and asymmetrical. We speak here of 'solidarity with'. However, it is important to recognise the value of reciprocity because it is anchored in the disaster activities of the UCPM. The countries involved should namely adhere to the principle of subsidiarity and the balance mechanism, be prepared to respond to disasters, and could receive assistance if their capabilities become overwhelmed by the circumstances of a disaster. Many instances of crisis, particularly the COVID-19 pandemic, show that the donor countries offering aid to those affected, either bilaterally or through international mechanisms such as the UCPM, had in other cases been the recipients of aid via the same mechanism. Here, we speak of 'solidarity among'.

Identification is a cornerstone of solidarity. The case of EU disaster solidarity is special in this regard. It is international institutional solidarity, and the EU is

striving to achieve the identification effect. Indeed, it is assumed that disaster relief within the EU could raise awareness among citizens of EU Member States concerning the value of the EU's institutions and promote their stronger identification with the EU and the European idea generally. If the recipients of the aid are outside the EU, the EU's action could improve its image in those countries and mean the EU becomes stronger as a global actor.

Having led to greater interconnectedness and interdependence between states, globalisation has been another area where solidarity has received an additional boost. When disasters occur in distant areas, their consequences can be felt in different parts of the world not directly affected by them, including Europe. For example, the tsunami in South East Asia in 2004 caused casualties among tourists from several European countries. Further, the Japan crisis of 2011 affected economies in Europe and elsewhere in the world as stock markets suffered, oil and gas prices rose and the supply of spare parts from Japan was disrupted. The earthquake in Taiwan in March 2024 has brought a similar impact, especially on the production of semiconductors. In the case of COVID-19 in 2020–2021, this type of necessity was emphasised even more. Finally, the war in Ukraine following Russia's aggression has stimulated extensive EU solidarity with Ukraine in several areas, including civil protection. The motives for such support are humanitarian in nature, yet also fuelled by the fear that the war could spread even further into the European neighbourhood. It is thus assumed that solidarity is also a form of self-protection. These cases prove it is not just about helping others to recover, but the countries participating in the UCPM must at the same time ensure that the affected countries recover, also in the interest of the donor countries.

Data on UCPM actions in the last decade confirm that EU solidarity in disasters and other crises is universal in terms of the geographical and temporal scope, diversity and nature of the disasters and crises triggering the solidarity mechanism, as well as the different types of assistance provided to the affected countries and people. The data also suggest that the number of actions to improve prevention and the preparedness of countries has been quite modest over the last decade (12 out of 536 actions). Perhaps this is an opportunity for the EU to strengthen solidarity in the run-up to disasters and make the disaster management systems of countries at risk more robust and sustainable.

As the case of Italy during COVID-19 shows, solidarity can be jeopardised or limited when several EU Member States are (or expect to be) affected by a crisis at once. On the other hand, the case of the floods in Slovenia demonstrates that individual cases of affected countries are not questionable in this respect, and that, as a rule, help is organized and offered quickly.

This analysis also revealed some critical observations concerning how the UCPM functions: 1) The European Commission (EC) should play a greater role in decision-making related to disaster response, especially when disasters occur in EU Member States. A purely coordinating role of the EU may not be sufficient, particularly when several countries are affected at the same time. Nevertheless, the EC's decision-making role has grown in recent years, as we saw in the chronology of the UCPM's development and the two practical cases (Italy and Slovenia) we presented. A stronger role for the EC could also contribute to a faster response to disasters. 2) In terms of the form of assistance, more emphasis should be placed on direct socio-psychological assistance to affected people and first responders, while indirect psychological support in the form of visits to

affected areas, expressions of solidarity, actual assistance and the like is already taking place. 3) The EU could also increase the number of actions dedicated to improving preparedness and prevention in third countries (see Table 2). This would increase the self-reliance of countries and perhaps reduce the need for external assistance in future events.

To wrap up the discussion, the UCPM's functional objectives include cooperation, the coordination of the participating states, pooling their resources, and building reserve capacities to improve the prevention, preparedness and response to various crises, while the mechanism's political motives have been associated with concepts like European solidarity, identity, the "Europe of nations" and "Europe without borders". Or, as Nimark and Pawlak (2013, 4) put it: "Apart from the enhanced functional aspects that civil protection cooperation entails, any response to a crisis sends a political message that the EU is ready and able to provide assistance and solidarity when disaster strikes". In this sense, Prochazkova (2013, 89) reminds us of the EU's "safe community" concept, which encompasses the protection of people in terms of individual needs such as food and security as well as social needs, social recognition, self-realisation and protection in emergency situations. The general purpose of the mechanism is for European countries to cooperate in the field of civil protection, support EU Member States and other countries affected by major disasters, ensure the safety of people, property, the environment and cultural heritage in the event of disasters, and coordinate the provision and delivery of assistance.

The resources for providing aid are limited and should therefore be used rationally. Given that many disasters often occur simultaneously around the world, EU coordination with other international organisations, in particular the United Nations Office for the Coordination of Humanitarian Affairs and NATO's Euro-Atlantic Disaster Response Coordination Centre, is essential.

5 CONCLUSION

The analysis was guided by three research questions, which are answered below. First, the conceptualisation of solidarity reveals great differences and controversies among scholars. There are views that focus on individual and group solidarity (collective, communal), whereas other views stress the importance of institutional solidarity, which derives from social solidarity. Put briefly the arguments are: solidarity must be located outside the legal framework vs. it should always be institutionalised through the law. A difference also appears regarding whether solidarity is a pure act of generosity or whether it additionally includes reciprocal expectations. Moreover, there is a debate concerning the drivers of solidarity: are people extremely rational and exercise solidarity when forced to do so by regulators, or are norms, values and emotions the true drivers of solidarity? Some authors believe the link between rationality and solidarity is crucial, while others argue that solidarity is an expression of empathy, morality and altruism.

Second, recent research has shown that solidarity is a collective action in disasters. Solidarity comes in a range of forms (search and rescue, medical, material, psychological, financial aid...) and from various directions (family, friends, local community, region, state, international organisations etc.), while its socio-psychological drivers are social identification with the people affected by the disaster, the solidary behaviour of others (solidary behaviour is 'contagious'),

emotions, ethical and moral aspects. The pure rationality of people and institutions, their self-interest or the expectation of reciprocity are not decisive for extending solidarity to those affected yet should not be completely ruled out. The tradition of solidarity-based aid in a community should be respected and valorised by the official actors of disaster relief to achieve optimal aid results. Many people return to the norms, values and interactions they had before the disaster. However, some individuals internalise disaster-related ethical commitments and behave altruistically even after the disaster.

Third, the EU's foundation and development are based on the concept of solidarity and overcoming animosity between historical enemies. The EU most likely holds the potential to develop a post-national concept of citizenship in the future. The foundations for this could be social justice and solidarity. One expression of this solidarity is the Union Civil Protection Mechanism. When juxtaposed with different conceptual foundations, it shows that it works in all disasters and other crises, in various forms of solidarity, on all levels of society and without geographical limitation. The solidarity actions of the UCPM are generous, moral, rational and (at least partly) reciprocal. The empirical findings confirm the universality of the UCPM's solidarity in terms of geographical scope, variety, the nature of crises, and the diversity of forms of assistance to affected countries. The positive effects of solidarity could be the stronger identification of people with the EU as an institution, with its values, objectives and activities. At the same time, solidarity in the event of a disaster strengthens the EU's position as a global actor.

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UNIJIN MEHANIZEM ZA CIVILNO ZAŠČITO V LUČI TEORIJE O SOLIDARNOSTI

Predstavljena analiza zajema konceptualno razpravo o solidarnosti in empirične ugotovitve, ki zadevajo solidarnostno vedenje ob nesrečah. Analizirali smo izbrane znanstvene članke na temo solidarnosti in jih soočili s strukturnimi rešitvami in funkcionalnimi izkušnjami EU na področju solidarnosti ob nesreči. V začetni fazi nesreče vznikli akterji spontano, kolektivno in altruistično zagotavljajo pomoč žrtvam. Delujejo na podlagi skupnih vrednot in norm, pri čemer ignorirajo normativne družbene razlike in vedenje v obdobju pred nesrečo. To solidarnost nato okrepijo lokalni, nacionalni in v nekaterih resnih primerih tudi mednarodni akterji. Eden od njih je Unijin mehanizem za civilno zaščito, ki zagotavlja pomoč regionalno in globalno. Solidarnost Mehanizma je mehanična, organska, hkrati pa je specifična mešanica, odvisno od primera do primera, velikodušnosti, morale, racionalnosti, vzajemnosti, identificiranja, povezanosti in medsebojne odvisnosti. Unijin mehanizem za civilno zaščito ima funkcionalne cilje in politične motive.

Ključne besede: solidarnost; nesreča; unijin mehanizem za civilno zaščito; akcije.



THE IMPACT OF COVID-19 ON THE ELECTORAL ARENA AND REGIME CHANGE: EVIDENCE FROM EUROPE AND AFRICA

Kenneth Ka-Lok CHAN and Simona KUKOVIČ¹

To the extent that the Covid-19 pandemic was a disruptive force that undermined governance across regimes, the global health crisis was said to have exacerbated democratic backsliding and emboldened autocratization. While a global trend towards backsliding has been widely perceived, this study is motivated by the observations that (a) there have been strong pushbacks among democracies against illiberal populism and (b) little has been done to study the resilience and/or fragility of autocratic regimes whose inherent weaknesses were exposed by the pandemic. With the help of a newly developed dataset covering elections and referendums across Europe and Africa at the national level in 2020 and 2021, the main contribution of the paper is two-fold: (1) to ascertain which factors mitigated the health and political risks posed by the pandemic irrespective of regime types in both regions, and (2) to take advantage of the most different systems design to shed light on not only the extent to which electoral integrity was adversely affected by the crisis, but also how European Union and African Union nations overwhelmed by the pandemic performed in their respective context.

Key words: Covid-19; elections; democratic backsliding; autocratization; public health; risk.

1 INTRODUCTION: MOVING BEYOND TALLYING A BIPOLAR RIVALRY

The World Health Organization (WHO) first declared Covid-19 a Public Health Emergency of International Concern (PHEIC) on 30 January 2020 and then a pandemic on 11 March 2020. By the time the disease was no longer a PHEIC, over 770 million cases have been reported, along with over 7 million deaths (Table

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1).² There is a consensus among scholars that the Covid-19 pandemic has put both democracies and autocracies under severe pressure. The unprecedented public health crisis exposed the systemic weaknesses in the global health governance and invited critical examination of the effectiveness of government responses with respect to trust, capacity, and coordination (The Independent Panel for Pandemic Preparedness and Response 2021; Brown and Roiser 2023; Kukovič 2022, 9; Malešič 2021, 66).

TABLE 1: COVID-19 CASES AND DEATHS

	Reported Cases	Reported Deaths
COVID-19 (Public Health Emergency of International Concern: 30 January 2020 – 5 May 2023)	775.43 million	7.05 million
<i>As of 31 December 2021 (the time frame adopted for this investigation)</i>	<i>291.67 million</i>	<i>5.52 million</i>

Source: World Health Organization <https://data.who.int/dashboards/covid19/cases>.

Covid-19 has illuminated pre-existing debates about democratic backsliding and autocratization and underscored political trajectories that may turn out to be transformative in the post-pandemic years. Academics and practitioners alike have framed the unprecedented health crisis as a new round of rivalry between autocracy and democracy. As early as February 2020, when the WHO-China Joint Mission described China’s response to be “the most ambitious, agile and aggressive disease containment effort in history,” (WHO 2020, 16) leading autocratic regimes including China and Russia began to use the pandemic to promote politicized narratives that centralized, top-down government control was more effective to fight the pandemic in order to reshape global public opinions about democracies which were portrayed to be slower to react to the pandemic and more reluctant to introduce restrictive measures to save lives (Huang 2021). Meanwhile, the pandemic was accompanied by a no less chronic “infodemic” consisting of waves of propaganda, conspiracy theories, and disinformation to boast about “the autocratic advantage” over democracies; the Oxford Internet Institute discovered that state-backed agencies from Russia and China were responsible for “92% of the misinformation” about the pandemic (Thompson et al. 2020; see also Cassan and Van Steenvoort 2021 and Haček 2024, 5). Informational manipulation reduced public attention to the disease and undermined national and global efforts to bring the pandemic under control. The International Press Institute (IPI)’s Covid-19 Press Freedom Tracker documented 677 press freedom violations linked to the pandemic (IPI 2021; Amnesty International 2021); accurate and timely information as the global common good needed to combat the pandemic was sacrificed when free press and freedom of expression faced the dual threats of state censorship and the viral spread of misinformation.

Thus, it was no coincidence for the Kofi Annan Foundation (2020) to issue a statement in April 2020 to warn that “democracy must not become the silent victim of the coronavirus pandemic.” Even though some autocratic governments have stood out in terms of effectiveness thanks to higher state capacity and a compliant population, scholars have cautioned against simplistic but misguided conclusions (Cepaluni et al. 2020; Cheibub et al. 2020; Stasavage 2020), not least because democracies that have invested in public health protection preceding

² There are alternative measurements such as excess mortality to address the well-known problem of under-reporting. See Economist (2021), Giattino (2021) and Aizenman et al. (2022).

Covid-19 have proven to rather resilient (Wang 2019; Legido-Quigley et al. 2020). Moreover, research findings reveal that democratic regimes not only enhance health and well-being, but also perform well in health crisis because democratically elected leaders tend to acquire trust and capacity at a higher level through participation, deliberation, and accountability (Christensen and Lægreid 2020; Wang et al. 2019). Admittedly, the arrival of vaccines in the end of 2020 and early 2021 was game-changing, particularly for countries, be they autocratic or democratic, that secured adequate doses for the vaccine programme early on. Focusing on the policy responses to Covid-19, Schmotz and Tansey (2023) assert that regime type is not an important factor in the politics of policymaking and the decisiveness of policy response to bring the disease under control (also Alon et al. 2020; Ang 2020; Karabulut et al. 2020; Kavanagh and Singh 2020; Knusten and Kolvani 2022; Maerz et al. 2020). Although this may be true, as we shall see in the next section, the policy responses to the global health crisis served to strengthen the prospects of elite-led backsliding and autocratization at the expense of democratic reforms instigated by civil society and social movements. Moreover, international support for pro-democracy civil society and social movements in various parts of the world waned along with the lockdowns and border closings (Hyde 2020; Norrlöf 2020; Samuels 2023).

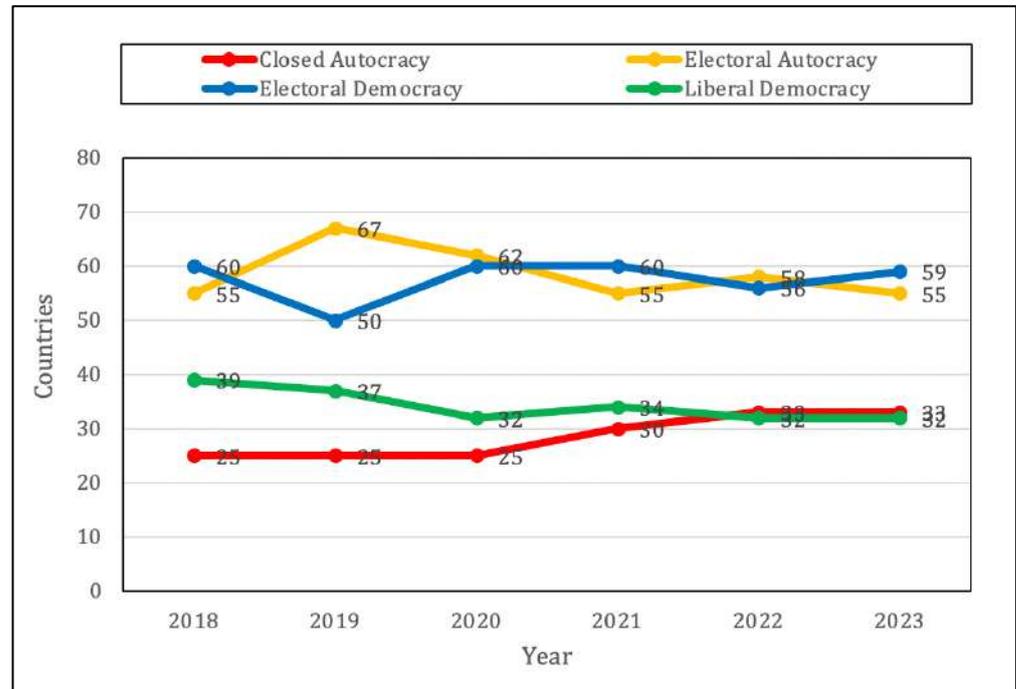
At the wake of Covid-19 in 2020, the Freedom House Index showed that about 38% of the global population lived in countries rated “Not Free,” the highest proportion since 1997, and only about a fifth lived in “Free” countries. The pandemic fuelled a global crisis for democracy as nearly 75% of the world’s population lived in a country that faced deterioration in 2020. (Freedom House 2020; Freedom House 2021; Repucci and Slipowitz 2022). The Varieties of Democracy (V-Dem) Project coined the term “Pandemic Backsliding” to highlight seven major types of violations of democratic standards and gathered high-profile episodes of both recession and resistance around the world (Edgell et al. 2020). In 2023, V-Dem reported that 27% and 44% of the world’s population lived in closed autocracies and electoral autocracies, respectively; electoral democracies and liberal democracies trailed far behind with less than one-third of the population. With more regimes undergoing autocratization than democratization on a year-to-year basis, the world has apparently drifted farther towards autocracy through executive aggrandizement, electoral manipulation, political rights violation, civil liberties restrictions, and accountability evasion (Figures 1-3; also, Lührmann et al. 2018).

Against this background, analysis of the pandemic’s impacts on the political regimes tends to gravitate to one of the two poles. On the one hand, in line with the conventional wisdom on democratic backsliding (Croissant and Haynes 2020; Willison et al. 2022), the world has witnessed the ascension of what Naím (2022, XV) calls the “3P autocrats who reach power through a reasonably democratic election and then set out to dismantle the checks on executive power through populism, polarization, and post-truth.” These self-serving political actors saw the crisis as an opportunity for personal power grab and took erratic policy measures which were aimed not at defending the democratic institutions but outmanoeuvring those who sought to stop them. Pulejo and Qurubin (2021) observed that incumbents either became more reluctant to impose or more willing to lift restrictive measures when the election was near because economic downturns were considered bad for the re-election prospects. Populists who indulged themselves in denialism, vaccine hesitancy, and conspiracy theories instead of science were responsible for the spread of the disease and excess mortality (Bayerlein et al. 2021; Bayerlein and Gyöngyösi 2020; Eberl et al. 2021;

Kavakli 2020; McKee et al. 2020; Williams 2020).

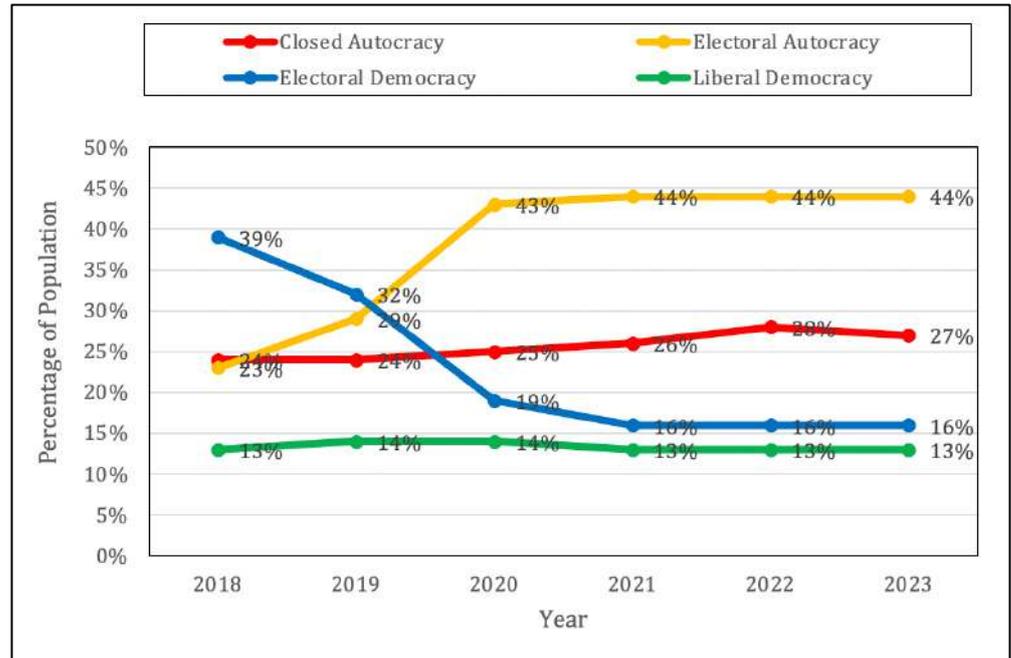
On the other hand, the growing literature has remained equivocal with competing outlooks with respect to the pandemic’s impacts and the temporal decline of democratic attributes (Anghel and Schulte-Cloos 2023; Sadurski 2022, 174–205). In essence, democracies may escape from the trap of democratic backsliding and autocratization amid the pandemic and have “the 3P autocrats” repudiated given a set of conducive factors such as higher prior respect for human rights and democratic values, stronger democratic institutions whose functions were buttressed by elected and non-elected stakeholders, higher level of economic development, state capacity, social capitals, lower level of public sector corruption, as well as valued political, economic, and ideational connections with a “democratic stock” (Boese et al. 2021; Engler et al. 2021; McMann and Tisch 2023). Conversely, for weakly institutionalized or younger democracies which have struggled with underlying vulnerabilities, the unprecedented challenges posed by the pandemic were expected to compound the existing problems in terms of deepening distrust and fuelling popular disillusionment with the political establishment, thereby setting the stage for backsliding and autocratization. Theoretically, one may take advantage of the growing repertoire of explanatory models encompassing a wide spectrum of “theory families”—cultural, normative, institutional, leadership, political economy, social structure and political coalitions, and international (Waldner and Lust 2018) to shed light on the varying outcomes, hence uniformity, not diversity, should surprise us.

FIGURE 1: REGIMES OF THE WORLD 2018–2023



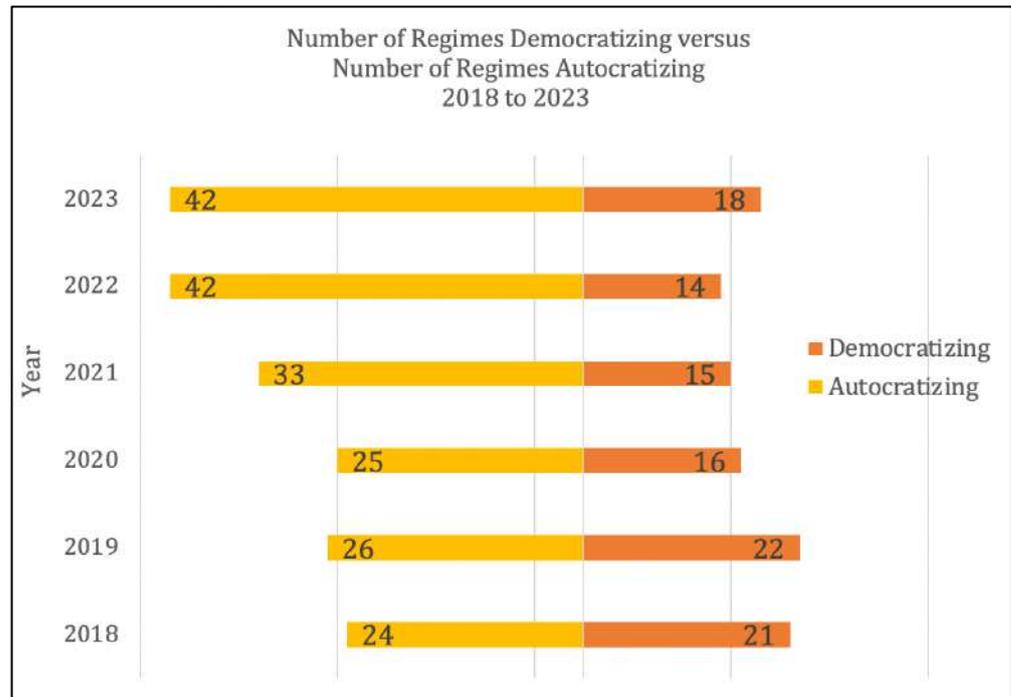
Source: Luhrmann et al. (2019); Maerz et al. (2020); Helmeier et al. (2021); Boese et al. (2022); Wiebrecht et al. (2023) and Angiolillo et al. (2024).

FIGURE 2: REGIME TYPES' SHARE OF WORLD POPULATION 2018–2023



Source: Luhrmann et al. (2019); Maerz et al. (2020); Helmeier et al. (2021); Boese et al. (2022); Wiebrecht et al. (2023) and Angiolillo et al. (2024).

FIGURE 3: NUMBER OF REGIMES DEMOCRATIZING VERSUS NUMBER OF REGIMES AUTOCRATIZING 2018–2023



Source: Luhrmann et al. (2019); Maerz et al. (2020); Helmeier et al. (2021); Boese et al. (2022); Wiebrecht et al. (2023) and Angiolillo et al. (2024).

We find both narratives dissatisfying, as the former overinterprets the causal role of the political leaders and their brinkmanship, while the latter has yet to agree on what matter most to the resilience and revitalization of democratic norm and practices. To the extent that empirical assessments are frequently limited to small-N comparisons or case-by-case election-oriented studies, singling out some weakly institutionalized new democracies risks the selection bias and the fallacy of exceptionalism which leads observers to overinterpret the positive or

negative significance of one specific moment. Hence, building on the meaningful analyses of the observed cases, it is necessary to also consider the findings of variable-oriented comparative study at a larger scale in geographical and temporal terms.

In this article, we take the growing concern about the proliferation of autocratic practices amid the Covid-19 pandemic as the point of departure. Although the initial interest is to understand why and how the unprecedented pandemic led to either postpone the elections and referendums or hold them as scheduled, as well as the impact of such decisions on electoral integrity in general terms (Ellena 2020), the inquiry has gradually developed into a systematic inquiry into how the pandemic interacted with the pre-existing political dynamics, the resultant mass electoral behaviour, and factors underpinning regime resilience and fragility. For the purpose of this investigation, the decline of democratic qualities with respect to participation, contestation, accountability, civic liberties, and political rights amount to backsliding. Three important caveats must be borne in mind: First, Ginsburg and Hug (2018) have aptly argued that “researcher must take account of those instances in which democracy survives major challenges in order to make strong causal claims about the conditions of democratic failure.” Second, Cianetti and Hanley (2021, 78) have observed that the concept of backsliding “may become a counterproductive paradigm because it reduces complex, non-linear political dynamics to movement along a linear trajectory of progress, standstill, or regression.” Third, one must pay attention not only to the relative strength of the illiberal or authoritarian forces vis-à-vis their prodemocracy counterparts, but also how the institutional and procedural guardrails are strengthened or weakened (Jacobs and Choate 2022). To our mind, democratic backsliding is related to yet still distinct from autocratization, which connotes a process of regime change presaged by the systematic dismantling of democratic institutions (Cassani and Tomini 2019).

To address the gaps identified above and to contribute to the emergent debates, we gather data from 260 elections and referendums around the world from February 2020 to December 2021 and present a set of three theoretically informed, non-mutually exclusive regression models for consideration. One of the major contributions of this paper is to show how one may make sense of the observed patterns among the electoral episodes from substantially different nations and regional blocs. We have devised a two-pronged approach combining global data analysis and the Most Different Systems Design (MDSD) which brings 14 European Union (EU) and 29 African Union (AU) member states together to demonstrate how the presumably destructive impacts of the pandemic were mitigated by institutional factors and the policy measures introduced (Anckar 2008). The basic information and descriptive statistics about the electoral episodes can be found in the Appendix; and the datasets are available from the project’s website www.hkeop2426.com. As we employ an inductive strategy which is theoretically informed, we look for the determinants of the dependent variable with an open mind, which will provide the complementary connections between variable-oriented and case-oriented inquiries in this Thematic Issue. Our investigation suggests several useful pathways for developing explanatory models based on verifiable evidence, thereby avoiding simplistic and impressionist depictions that do not do justice to complex situations resulted from the crisis.

2 COVID-19 AS A QUIET ASSASSIN OF DEMOCRACY?

The pandemic has hit the world regardless of regime types, wealth, and location. However, there is no secret that Covid-19 had been exploited by autocrats and their supporters to crackdown on the opposition (Barceló et al. 2022; Cassani 2022; Grasse et al. 2021; Kochnein and Koren 2022). Many of the radical response measures adopted by autocracies to slow down the infection and save lives have been in use in non-democratic countries to stifle the opposition and civil society for years. In the face of a global health crisis, human rights and democracy were further compromised by autocrats without bearing the costs of greater international and domestic pressure. One reason Covid-19 was considered a serious threat to democracy was that it offered a “health-enhancing” narrative for legitimizing illiberal practices which began to proliferate around the world in the preceding years (Lührmann and Linberg 2019; Lührmann et al. 2019; Maerz et al. 2020; Grasse et al. 2021). The Oxford Covid-19 Government Response Tracker (OxCGRT) offers systematic information on policy measures such as workplace closures, travel restrictions, and restrictions on public assemblies across more than 180 countries and territories since 1 January 2020 (Hale et al. 2021). Health and security concerns were used to justify the widespread adoption of surveillance and control over ordinary citizens through compulsory and intrusive “test, track and trace” measures (Markotkin 2021). Disguised as pandemic response measures, illiberal governments and populists found it easier to carry out opportunist repression and election manipulation (Clay et al. 2022; James and Asplund 2020; Kjaerum et al. 2021).

The International Centre for Non-Profit Law (2020), which monitored how government responses to the pandemic adversely affected civil liberties and human rights, recorded emergency declarations in 110 countries, 61 countries with measures that affected privacy, 58 countries with measures that affected freedom of expression, and 153 countries with measures that affected freedom of assembly. IDEA (2021) found that nearly half of democracies resorted to emergency measures to combat Covid-19 in 2020. According to the tally made by V-Dem (Alizada et al. 2021), nine democracies registered major and 23 moderate violations of international democratic norms. 55 autocratic regimes engaged in major or moderate violations of international norms in response to the pandemic. The United Nations Special Rapporteur on the Rights to Freedom of Peaceful Assembly and of Association (2021, 11) commented that lockdowns “heightened the risks of joining peaceful assemblies, as many countries respond to the pandemic with a national militaristic approach and enforce restrictions to movement and gatherings with excessive force and harsh penalties.” Chenoweth (2022) was concerned that the pandemic and the ensuing near-universal restrictive measures had the dual impact of accentuating the authoritarian challenges to democracies and further weakening the ability of mass movements to effectively organize the necessary push back. However, Youngs (2020a) has observed that “the pandemic has given global civil society a new sense of urgency, unleashed a spirit of civic empowerment, and prompted civil society organizations to deepen their presence in local societies.” The Carnegie Civic Research Network (2021) has documented the resilience of civil society and civic activism that sought to keep the decay and decline of democratic values and practices in check. The question remained whether the temporary restrictions introduced to fight Covid-19 set the stage for the onset of the deconsolidation of democratic regimes, as Lührmann and Rooney’s (2021, 618) longitudinal study shows that democracies were “75% more likely to erode under a state of emergency than without, marking a substantial increase in the probability of

democratic decline.”

By and large, the global crisis has risked further erosion of constraints on government powers irrespective of the existing constitutional and legal ground rules, rendering it exceedingly challenging for upholding the rule of law and for holding governments and leaders to account (Meyer-Resende 2020; Piccone 2021; World Justice Project 2020). To tackle the question: “Was Covid-19 a Quiet Assassin of Democracy?”, we begin with the dilemma confronting countries where elections and referendums were due against the backdrop of the pandemic, viz. delaying elections may be good for public health but bad for governance when postponement was to fuel polarization and undermine trust. Krimmer and his collaborators (2021, 9) surmise that “Covid-19 placed elections between a rock and a hard place: there is no easy ‘quick fix’ with this challenge.” As Covid-19 was a highly infectious disease, the last thing people wanted was to turn the polls into “super spreader events.” Few would disagree that Covid-19 tended to reduce turnout intention, raising concerns over higher abstention among the marginalized communities, risk-averse people and families, and regions that were hit badly by the disease. Moreover, holding elections and referendums during lockdowns and closures and in conditions detrimental to maintain the level-playing field could but undermine the credibility of the results. Electoral integrity cannot be guaranteed where pandemic-related restrictive measures had been used to alter scheduled election cycles, stifle the opposition, curb civic participation, and limit opportunities for independent election observation (Gottlieb 2021). While time-limited postponement made sense in most circumstances, the subsequent partisan squabbling may carry the risk of institutional uncertainties and democratic breakdown (James and Alihodzie 2020; Landman and Splendore 2020).

Knowing in advance that public gatherings of citizens, the canvassing activities, and turning out to vote on the polling day all entailed considerable risk of contracting the coronavirus, election and human rights bodies have put forward practical advice on what to do for elections and referendums to proceed with integrity, conclude with credible outcomes, and protect public health (Table 2).

TABLE 2: HOW TO PROTECT PUBLIC HEALTH AND UPHOLD ELECTORAL INTEGRITY DURING COVID-19

- | |
|---|
| <ul style="list-style-type: none"> ❖ State emergency powers that curtail fundamental rights and conflict with the rule of law should be avoided. ❖ Electoral laws and operational guidelines should be updated to cover all contingencies relating to pandemics and other emergencies. ❖ Extra funding for elections that take place during health crises should be considered in advance. ❖ Provisions for Special Voting Arrangements (SVA) which deemed desirable. ❖ Measures should be taken to increase the number of polling stations to minimize waiting time and the gathering of too many people at one time. ❖ Arrangements should be made to ensure election observation can still occur. ❖ Health risks need to be minimized for election officials and voters. ❖ A balance needs to be found between safety and candidates' right to campaign. ❖ Inclusive inter-party advisory committee should be set up to generate the wide political agreement. ❖ Measures should be taken to increase public compliance with safety protocols based on the public health guidelines. ❖ Safety protocols should be enforced evenly and consistently across the political spectrum. |
|---|

Source: Asian Electoral Stakeholder Forum (2020); Birch (2020); Commonwealth (2020 and 2021); Council of Europe (2020); European Parliament (2020a) and Venice Commission (2020).

Moreover, knowing that what the incumbents chose to do and how the stakeholders responded could either mitigate or exacerbate the pandemic's effects, *ad hoc* adjustments to the conventional methods of campaign and voting required a three-pronged approach consisting of (a) *a-prior* consensus-building among the contenders; (b) expedient changes of the electoral laws if necessary; and (c) the provision of additional resources to the electoral management bodies

(EMB) and front-line election staff trainings to help mitigate the health risk, improve people's willingness to vote by providing clear and reliable information about health and safety measures, and uphold the overall electoral integrity.

Table 3 confirms that postponement of elections and referendums in response to Covid-19 was basically regarded as a last resort, in most cases a new date was announced to allow for better preparation by the authorities and better provision of information to the stakeholders during the extra time available. All but three of the elections and referendums under examination were held during the crisis, of which 76% took place as originally scheduled. Among the first elections which took place in 2020, South Korea, Israel, and New Zealand were applauded for having upheld electoral integrity and protected public health during the pandemic. These successful stories had in common a determination to safeguard the legality of the process, promote consensus across the political spectrum, uphold citizens' rights, provide reliable information about the pandemic, seek the people's understanding and support in a wide range of mitigation measures, provide additional resources to the electoral management authority to address the prevailing health concerns, and strengthen the credibility of the outcomes (Asplund and James 2020; Asplund et al. 2021; Cox 2020; James 2021; Merkley et al. 2022; Spinelli 2021).

TABLE 3: NATIONAL ELECTIONS AND REFERENDUMS (FEBRUARY 2020 TO DECEMBER 2021)

		Postponed and held	Held as scheduled	Special voting arrangements (SVA)*	Postponed and pending
Elections	207	40	165	110	2
Africa	55	9	45	23	1
Americas	60	10	49	27	1
Asia and Middle East	38	8	30	24	0
Europe	41	8	33	29	0
Oceania	15	5	10	9	0
Referendums	53	21	31	15	1
Africa	10	9	1	2	0
Americas	5	2	3	2	0
Asia and Middle East	6	4	2	0	0
Europe	25	5	20	8	0
Oceania	7	1	5	3	1
Total	260	61 (23.5%)	196 (75.6%)	125 (48.1%)	3 (1.2%)

*SVA adopted during Covid-19 as alternative means to the conventional, in-person voting on the polling day included but not limited to early voting, proxy voting, in-country postal voting, multiple-day voting, mobile ballot box, drive-through polling stations, and overseas voting.

Source: Authors.

Where elections and referendums did take place, we ask to what extent they became "super spreader events," thereby inflicting the countries concerned a poll-related health crisis. Table 4 clearly shows that globally, the worst fears about elections and referendums spreading the disease did not come to bear, as the number of reported Covid-19 cases increased after the polling day in 109 electoral episodes but decreased or remained unchanged in 144 of them. Bearing in mind the built-in incentive among the autocrats and populists in power to conceal the severity of the crisis, "the autocratic advantage" was indeed exaggerated as we can see that nations ranked as "Free" according to Freedom House were not invariably outperformed by the "Partly Free" and "Not Free" nations.

Among the 144 electoral episodes where Covid-19 did not grow after the polling day, Special Voting Arrangement (SVA) was in use in 66 of them; in contrast, among the 109 polls where the number of cases increased, SVA was in use in 59 of them. The results are inconclusive given that SVA like postal voting, drive-through voting, and early voting was introduced in less than half of the polls under examination. To expand our inquiry into how the pandemic affected the level of turnout in comparison with the last election (excluding therefore the referendums), Table 5 shows that turnout decreased from the last national elections in most of the cases (101 out of 171). Turnout decline was the modal outcome across different types of regimes having elections during the pandemic. We further observe that SVA did not seem to have encouraged higher turnout in most cases. Nations that introduced SVA to mitigate the health risk and to encourage higher turnout amidst the pandemic are laudable, but by themselves, SVA designed to strike a balance between health protection and electoral integrity appeared to have no sizable impact with respect to mitigating the spread of the disease and incentivizing voter participation. Future study may look more closely into the independent effects of SVA on voter participation and electoral integrity during the pandemic by ascertaining who took advantage of such venues of electoral participation, who did not, and why.

TABLE 4: SPREAD OF CORONAVIRUS AFTER THE POLL (FEBRUARY 2020 TO DECEMBER 2021)

	The Number of Cases Increased after Poll	Special Voting Arrangements Available	The Number of Cases Decreased / Unchanged after Poll	Special Voting Arrangements Available
Regime Type*				
Free	46	27	61	31
Partly Free	26	13	44	16
Not Free	28	16	25	9
Unclassified	9	3	14	10
Total	109	59	144	66

*Freedom House (2021).
Source: authors.

TABLE 5: TURNOUT CHANGE AND SPECIAL VOTING ARRANGEMENTS IN 171 ELECTIONS

	Elections with Turnout Increased	Special Voting Arrangements Available	Elections with Turnout Decreased	Special Voting Arrangements Available
Regime Type*				
Free	28	18	38	26
Partly Free	25	12	27	10
Not Free	12	5	28	11
Unclassified	5	1	8	6
Elections Observed	70	36	101	53

*Freedom House (2021).
Source: authors.

Putting these initial observations together, we surmise that elections and referendums did not become “super spreaders” partially because of the effective implementation of the safety protocols to enable conventional, in-person voting (James et al. 2023), and partially because of the risk-avoidance behaviour of the electorates who for reasons of health and related concerns preferred abstention over participation (Palguta et al. 2022; Mohee 2021).

Apart from the turnout, the overall electoral integrity may be further influenced by the mobilization effects of polarization when the pandemic amplified pre-existing social and political divides between citizens who placed trust in the

incumbent leaders and others who sought change. Table 6 shows that the number of countries encountered moderate to serious threats or acts of boycott was 21 in 2020 and 17 in 2021; whilst the number of countries experienced moderate to serious threats or acts of election violence was 36 in 2020 and 22 in 2021. Clearly, hybrid, “Partly Free” regimes and autocracies were exposed to higher risk of boycott and violent clashes between rival political camps, especially when electoral manipulation by the incumbents were perceived to be serious. Opportunistic state repression riding on the back of pandemic policy responses, oftentimes combined with socioeconomic grievances, was another main cause for mass protests, boycotts, and violent clashes. On balance, democratic nations outperformed autocracies and hybrid regimes by a large margin with respect to polls free from boycott and violence (Birch 2020, 27; Casas-Zamora et al. 2020; Gottlieb 2021).

TABLE 6: NUMBER OF COUNTRIES EXPERIENCED BOYCOTT AND VIOLENCE

2020				
Threats or Acts of Boycott		Regime Type*	Threats or Acts of Violence	
Moderate to Serious	Boycott-Free		Violence-Free	Moderate to Serious
0	23	Free	18	5
8	13	Partly Free	4	17
13	4	Not Free	3	14
21	40	Subtotal	25	36
61		Countries	61	
2021				
Threats or Acts of Boycott		Regime Type*	Threats or Acts of Violence	
Moderate to Serious	Boycott-Free		Violence-Free	Moderate to Serious
0	21	Free	20	1
3	12	Partly Free	3	12
14	4	Not Free	9	9
17	37	Subtotal	32	22
54		Countries	54	

Source: Election boycott and violence data from V-Dem 14, see Coppedge 2024.

3 WHAT DID ELECTIONS AND REFERENDUMS REVEAL ABOUT ELECTORAL INTEGRITY AND DEMOCRATIC RESILIENCE IN EUROPE AND AFRICA?

For a more nuanced understanding of the phenomenon of “pandemic elections and referendums,” we employ the Most Different Systems Design to bring together 76 electoral episodes in the EU and AU which took place during the health crisis. In the AU, where “the modal tendency among countries remains to instigate no change at all” (Arriola et al. 2022, 18), the decade before the pandemic witnessed the trend of backsliding and autocratization among electoral democracies and electoral autocracies. Collective insecurity resulting from Covid-19 was compounded by pre-existing state fragility, opportunistic repression, public sector corruption, and deep-seated divisions in society. The electoral playing field was hardly free or fair in most circumstances; political opportunism displayed by incumbents and the opposition alike undermined concerted efforts which were necessary to combat the disease (Siegle and Cook 2020; Mo Ibrahim Foundation 2023; Transparency International 2022). Self-serving autocrats were inclined to underreport deaths, conceal the level of Covid-19 infections, and manipulate information which may undermine their rule. In some cases, political opportunism threatened not only democracy but also the lives of the leaders who downplayed the severity of the disease. Burundian President Pierre Nkurunziza and Tanzania’s President John Magufuli called for

prayers, rejected vaccines, and promoted ingenuous methods to fight the pandemic. Magufuli even declared the country “Covid-19 free” in May 2020. Both suspectedly died from the disease and related complications (Carlitz et al. 2021; Flisse et al. 2021). Against the background of chronic governance deficiencies, most African electoral episodes stood little chance of resisting either further backsliding or outright autocratization.

The African Union, the African Regional Economic Communities, and other states-led regional bodies have long struggled to grow into a formidable bulwark against autocratic takeovers, military coups, and rampant corruption in the continent. In contrast, the European Commission and the European Parliament were involved in trying to coordinate Member States’ “exit strategies” through a Joint European Roadmap towards lifting Covid-19 containment measures since April 2020, with instruments such as linking a new “Rule of Law Conditionality” to EU funding, as well as naming and shaming abuse of powers by governments that were found to have jeopardized democracy, the rule of law and fundamental rights (European Commission 2020; European Parliament 2020b). The EU emerged to be a more trusted body and one of the few clear beneficiaries of pandemic politics; Eurobarometer surveys found a narrow plurality of Europeans were dissatisfied with the EU’s handling of the pandemic, but they were even more dissatisfied with their national governments’ performance (European Union 2021).

Across the EU, sub-regional patterns were detectable. Specifically, Poland, Hungary, the Czech Republic, Slovakia, Romania, and Bulgaria have been closely observed as to how the pre-existing vulnerabilities, polarization, and democratic declines may deteriorate further (Cassani et al. 2023; Drinoczi and Bien-Kacala 2020, Gusati 2021; Krastev and Leonard 2021; Young et al. 2020). But surveys conducted in 15 Western European countries in March and April 2020 found that lockdowns boosted satisfaction with democracy by around 3% and the voting intention for the incumbent leaders by around 4% (Bol et al. 2020). Such EU-specific regional dynamics has brought about what Gessler and Wunsch (2023) has termed a new “democratic divide” which provides a needed focal point to mobilize and unite the opposition in defence of democracy against the incumbents who indulged in further aggrandizement. It remains to be seen whether the new focal point (that democracy is on the ballot), together with the electoral setbacks for “the 3P autocrats,” was sufficient to not only check against efforts to erode the democratic institutions, but also enhance the prospects of democratic consolidation.

Appendix A gathers the descriptive statistics pertinent to the EU and AU countries which had elections and referendums from February 2020 to December 2021. As it turned out, the doomsday scenarios for EU disintegration and democratic decline did not materialize; to be sure, there were episodes of regression in Hungary, Poland and to a lesser extent, Portugal, but democratic resilience prevailed in most cases and the EU has grown stronger in policy and institutional terms. In Africa, where autocracies and hybrid regimes have long dominated, the positive stories of Seychelles, Gambia, Malawi, and Zambia necessitate a more nuanced analysis than what the paradigm of backsliding or autocratization has offered.

Based on the descriptive statistics gathered thus far, we proceed to prepare three multiple linear regression models with reference to the growing literature to ascertain the determinants for the spread of the disease, the level of turnout, and

the overall perceptions of electoral integrity (PEI); Appendix B presents the list of variables used in the statistical models. Specifically, we designed the models with the following questions in mind:

1. How were the health risks mitigated more effectively in some cases but less in others? (Table 7)
2. What factors contributed positively to voter participation, and what factors suppressed it during Covid-19? (Table 8)
3. What factors shaped electoral integrity? (Table 9)

Appendix C explains a total of eight countries (one EU and seven AU nations) and 12 electoral episodes are not accounted for in regression models because of missing variables and/or unreliable data.

3.1 Disputing “the autocratic advantage” thesis

Table 7 reports the regression estimates of the effect of the electoral episodes in EU and AU on the spread of the disease with respect to a set of variables that can be broadly divided into (A) Pandemic-related: the number of Covid-19 cases 14-day before the poll, (B) Policy response and measures such as the state of emergency, restrictive measures as well as the coverage of the vaccine programme, and (C) Regime-related: election year, regional affiliation, the level of perceived corruption, EMB capacity, SVA, turnout, regime type, as well as the Electoral Democracy Index (EDI) and the Liberal Democracy Index (LDI).³ Overall, the regression model is significant, $F(16, 56) = 77.747$, $p < .001$, $R^2 = 0.957$. The findings show that:

- a. The number reported cases post-election or post-referendum increased infected cases 14-day before and 14-day after the polling day are found to be strongly associated ($\beta = 0.765$, $t = 14.244$, $p < 0.001$), the finding implies that 1% of increase in infected cases 14-day before the polling day is associated with an approximate 0.765% change in the infected cases 14-day after the polling day, confirming the concern that the polls, if not carefully implemented with necessary health and safety measures, could play a part in the worsening of the public health crisis.
- b. The State Emergency Index and the Stringency Index were indicative of the severity of the pandemic during the electoral cycle ($\beta = 0.918$, $t = 3.227$, $p < 0.01$, and $\beta = 0.036$, $t = 4.493$, $p < 0.01$), but it was due to specific policy measures such as “stay home requirement” ($\beta = -0.471$, $t = -2.420$, $p < 0.05$) and bans or limits on gatherings ($\beta = -1.334$, $t = -4.280$, $p < 0.01$) that the infectious disease was brought under control.
- c. Nations with higher EDI (an index which highlights accountability and transparency) and EMB capacity at the time of the elections and referendums were better prepared to protect public health and uphold free and fair elections at the same time ($\beta = -5.356$, $t = -2.563$, $p < 0.05$, and $\beta = -0.420$, $t = -3.645$, $p < 0.01$), the findings suggest that a one-unit increase in EDI results in a multiplicative change in Covid-19 cases 14-day after the polling day by a factor of $e^{-5.356} = 0.005$, whereas a one-unit increase in EMB capacity results in a multiplicative change by a factor of $e^{-0.420} = 0.657$.
- d. Conversely, nations with higher LDI, which emphasizes individual liberties

³ According to the V-Dem conceptual scheme, EDI encompasses freedom of association, clean elections, freedom of expression, elected official, and suffrage, whereas LDI reflects the quality of democracy by emphasizing the importance of protecting individual and minority rights and the limits placed on government, including constitutionally protected civil liberties, strong rule of law, an independent judiciary, and effective checks and balances that, together, limit the exercise of executive power.

and checks on state powers, were likely to face an increase of post-election infection ($\beta = 3.789$, $t = 1.904$, $p < 0.1$), which suggests that a one-unit increase in LDI results in a multiplicative change in infection cases 14-day after the polling day by a factor of $e^{3.789} = 44.2$. In a similar vein, higher electoral integrity (PEI) where there were less restrictions throughout the electoral cycle tended to see an increase in Covid-19 cases 14-day after the polling day ($\beta = 0.040$, $t = 2.257$, $p < 0.05$), one-unit increase in PEI results in a multiplicative change in COVID cases 14-day after the polling day by a factor of $e^{0.040} = 1.04$.

- e. Factors that have no statistical significance in accounting for the variance in the Covid-19 cases reported after the electoral episodes include the vaccine programme, regional affiliation (EU, AU), election year, regime type (Autocracy, Democracy), corruption, SVA, and the level of turnout. This discovery refutes “the autocratic advantage” thesis as much as cautions against the “liberal” approach towards the pandemic.

3.2 Voters’ risk-avoidance behaviour and state responses explain turnout in pandemic elections

As we have shown above, most of the elections recorded a decline in turnout. To understand the extent to which the pandemic dissuaded voters from turning out to vote, Table 8 presents the second regression model which enlists the following variables: (A) Pandemic-related: the number of Covid-19 cases 14-day before the poll, (B) Policy response and measures similar to those used for the last model, and (C) Regime-related: election year, regional affiliation, regime type, as well as the EDI and the LDI. In sum, the regression is significant, and the model explains 45.7% of the variance in turnout, $F(10, 64) = 5.397$, $p < .001$, $R^2 = 0.457$. The findings show that:

- a. In line with the aforementioned “risk avoidance” decisions of voters, the pandemic, which is measured by the 14-day cases prior to polling, was found to have adversely affected the level of turnout ($\beta = -0.025$, $t = -1.850$, $p < 0.1$), the finding suggests that 1% increase in 14-day cases prior to polling leads to a decrease in voter turnout by about 2.5%.
- b. The State of Emergency Index and the “stay home requirement” specifically are found to have significantly contributed to lower turnout ($\beta = -0.188$, $t = -2.819$, $p < 0.01$, and $\beta = -0.204$, $t = -4.363$, $p < 0.001$), a one-unit increase in the State of Emergency Index leads to a direct decrease in voter turnout of 18.8%, whereas the implementation of “stay home requirement” leads to a decrease in voter turnout of 20.4%. This observation agrees with the argument that the impact of pandemic on the turnout in elections and referendums was channelled through the specific mix of the response measures introduced by the government during the electoral cycle.
- c. Although voter turnout was generally lower in EU ($\beta = -0.134$, $t = -1.830$, $p < 0.1$), the pandemic-related variables provide us with better understanding about the decision-making process behind voters’ behaviour such as turnout than most of the regime-related variables which are not statistically significant at all.

TABLE 7: REGRESSION ESTIMATES OF THE EFFECT OF PANDEMIC-RELATED AND REGIME-RELATED VARIABLES ON THE 14-DAY INFECTION CASES REPORTED AFTER POLLING DAY

	Model
(Constant)	-1.288 (1.057)
14-day Incidence before Polling Day (log)	0.765*** (0.054)
Covid-19 Vaccine Doses Administered (% of Population)	-0.678 (0.601)
State of Emergency Index	0.918*** (0.285)
OxCGRT Stringency Index	0.036*** (0.008)
Stay Home Requirement (Yes=1, No=0)	-0.471** (0.195)
Limits on Gatherings (Yes=1, No=0)	-1.334*** (0.312)
Regional Affiliation (EU=1, AU=0)	0.223 (0.311)
Election Year (2020=1, 2021=0)	0.359 (0.247)
Regime Type (Closed & Electoral Autocracy=1, Electoral & Liberal Democracy=0)	0.020 (0.455)
Electoral Democracy Index	-5.356** (2.090)
Liberal Democracy Index	3.789* (1.990)
Corruption Perception Index score	0.017 (0.014)
Electoral Integrity Index (PEI)	0.040** (0.018)
Electoral Management Body Capacity	-0.420*** (0.115)
Special Voting Arrangements (Yes=1, No=0)	0.097 (0.198)
Turnout	-0.387 (0.522)
Adjusted R ²	0.945
N	73

F(16, 56) = 77.747, $p < .001$, $R^2 = 0.957$. Notes. ***, **, * denote the rejection of the null hypothesis at 1%, 5% and 10% significance level respectively.

3.3 How to Maintain Electoral Integrity in Pandemic Elections

Turning to concerns about whether electoral integrity was seriously challenged amid Covid-19, the Electoral Integrity Project's PEI, which is based on experts' assessments of eleven stages in the electoral cycle from start to finish, is the variable of interest (Garnett et al. 2023). Across the two regional blocs, Table 9 shows why PEI was not invariably undermined by the pandemic. The regression is significant, and the model explains 87.3% of the variance in PEI, $F(11, 61) = 38.255$, $p < .001$, $R^2 = 0.873$. Specifically, the findings show that:

- PEI was strongly improved by not only regime type (the host nations' democratic credentials) ($\beta = -16.477$, $t = -8.124$, $p < 0.001$), but also for countries which took advantage of the vaccine programme to fight the pandemic and demonstrated strong EMB capacity during the election ($\beta = 14.817$, $t = 2.592$, $p < 0.05$, and $\beta = 4.751$, $t = 4.773$, $p < 0.001$). This analysis holds true also for nations undergoing a rise of Covid-19 cases 14-day after the polling day ($\beta = 3.372$, $t = 3.190$, $p < 0.01$).
- In contrast, PEI was clearly undermined where the State of Emergency measures amounted to the violations of electoral rights and distorted the playing field in favour of the incumbent ($\beta = -8.247$, $t = -3.106$, $p < 0.01$), the

data suggests that a one-unit increase in the State of Emergency Index results in a decrease of 8.247 units in PEI. Moreover, the scale of the infection 14-day before the polling day had a negative effect on PEI ($\beta = -2.024$, $t = -2.231$, $p < 0.05$)

- c. The remaining factors (regional affiliation, the Stringency Index, the year when the election happened, SVA availability, and the actual turnout) did not reach statistical significance.

Given that the pre-existing conditions between the EU and the AU were hugely different, it should not be surprising to learn that EU nations attained higher levels of PEI despite the pandemic, whilst AU nations mostly logged lower PEI levels. That said, with the help of the MDSD design, we can demonstrate how democratic nations have succeeded in upholding electoral integrity and supporting free and fair polls that protected public health. The three regression models ascertained that the electoral episodes which took place during Covid-19 did not become what many feared to be “super spreader events” to trigger a global shift of balance in favour of autocracy. Of equal importance, the alarming forecast that Covid-19 was a quiet assassin of democracy has not materialized. In most democratic countries, effective adjustments were introduced to the electoral arena in ways that upheld political rights and civil liberties and protected public health, enabling the elections and the referendums to proceed with integrity.

4 CONCLUDING REMARKS: ABOUT THE THEMATIC BLOCK

Against the backdrop of a global expansion of populism and authoritarian rule, this article offers a systematic review of the extant literature to understand how Covid-19 shaped the electoral arena in general and whether the pandemic has sped up autocratization around the world. Overall, robust democracies were able to deal with the pandemic without jeopardizing democratic standards, there has been little appetite among liberal and electoral democracies to trade fundamental rights and freedoms for illiberal practices for good. Covid-19 did not become a quiet assassin of democracy, and “the autocratic advantage” thesis is therefore disputed. In the EU, in addition to national-level endeavours, supranational institutions and mechanisms provided timely and effective checks against further backsliding that might have otherwise happened. In Africa, while incumbents in non-democratic regimes were more likely to be exposed to boycott, violence and instability than their counterparts in democratic regimes, autocrats whose inherent vulnerabilities were laid bare by the spread of the disease stepped up the repression in the name of public health protection, thereby strengthening the regional and global trend towards autocratization.

To further develop the key findings of the research undertaken, we turn to in-depth country-specific analyses. The oft-mentioned trouble-making EU nations, particularly Hungary and Poland, have taken similar courses of action amid the pandemic, hence providing a valuable window of opportunity for us to acquire a better understanding of the context in which a new wave of democratic backsliding and autocratization was unleashed. In Poland, **Michał Jacuński** has conducted a series of narrative analysis of the government’s publicity campaigns in conjunction with the “Anti-Crisis Shield” which could not be easily separated from the Law and Justice government’s agenda leading up to the 2020 Presidential election. To the extent that the semantic domain of the policy environment became less transparent and inclusive, the electoral arena may no

longer be considered a level-playing field. As it turned out, Poland's erratic handling of the poll during the nation-wide lockdown was controversial and divisive. While the PiS leaders clearly sought political mileage at the expense of their political opponents, they encountered strong pushbacks which brought about higher turnout in both rounds of the election and the re-election of President Andrzej Duda by a mere 2.06% margin. **Robert Sata** and **Marta Żerkowska-Balas**'s article elucidates how the pandemic has dealt a double blow to Hungary's democratic institutions and values. Here, populism, polarization, and post-truth were on full display since Viktor Orbán and his government seemed determined to take advantage of the pandemic, and then the war on Ukraine, to consolidate not democracy but a government by decree. Moreover, the pandemic set off a new wave of "infodemic" which was saturated with pro-government discourses to justify the anti-democratic practices.

TABLE 8: REGRESSION ESTIMATES OF THE EFFECT OF THE PANDEMIC, RESPONSE MEASURES, AND REGIME-RELATED VARIABLES ON VOTER TURNOUT

	Model
(Constant)	0.747*** (0.175)
14-day Incidence before Polling Day (log)	-0.025* (0.014)
State of Emergency Index	-0.188*** (0.067)
OxCGRT Stringency Index	0.001 (0.002)
Stay Home Requirement (Yes=1, No=0)	-0.204*** (0.047)
Covid-19 Vaccine Doses Administered (% of Population)	0.039 (0.163)
Regional Affiliation (EU=1, AU=0)	-0.134* (0.073)
Election Year (2021=1, 2021=0)	-0.091 (0.058)
Regime Type (Closed & Electoral autocracy=1, Electoral & Liberal Democracy=0)	0.037 (0.099)
Electoral Democracy Index	-0.233 (0.532)
Liberal Democracy Index	0.547 (0.471)
Adjusted R ²	0.373
N	75

F(10, 64) = 5.397, $p < .001$, $R^2 = 0.457$. Notes. ***, **, * denote the rejection of the null hypothesis at 1%, 5% and 10% significance level respectively.

To complement the top-down, elite-oriented analyses, **Lilla Tóth**, **György Lengyel**, and **Borbála Göncz** take us back to Hungary to chart the contours of public opinions with the help of survey data collected at various stages of the pandemic period. In line with the expectation that the public health crisis contributed to the phenomenon of incumbency advantage, the authors shed new light on how partisanship has decidedly shaped mass attitudes towards the Orbán government, whereby retrospective policy assessment was rendered less impactful in a deeply polarized society. In sum, in a concerted effort to address the ongoing concerns about the state of democracy, the four articles of this Thematic Block offer no room for complacency, not least because the ideological, geopolitical, and "the 3P" challenges show no sign of receding, and our objective to put forward theoretically-informed, evidence-based insights for further investigations towards the "Autocracy vs Democracy" debate during the pandemic period remains as relevant as ever.

TABLE 9: REGRESSION ESTIMATES OF THE EFFECT OF THE PANDEMIC, RESPONSE MEASURES, REGIME-RELATED VARIABLES AND ON ELECTORAL INTEGRITY

	Model
(Constant)	65.309*** (5.222)
Covid-19 Vaccine Doses Administered (% of population)	14.817** (5.717)
14-day Incidence before Polling Day (log)	-2.024** (0.907)
14-day Incidence after Polling Day (log)	3.372*** (1.057)
OxCGRT Stringency Index	-0.043 (0.058)
State of Emergency Index	-8.247*** (2.655)
Regional Affiliation (EU=1, AU=0)	-0.336 (3.000)
Regime Type (Closed & Electoral Autocracy=1, Electoral & Liberal Democracy=0)	-16.477*** (2.028)
Election Year (2020=1, 2021=0)	1.874 (2.276)
Special Voting Arrangement (Yes=1, No=0)	-2.217 (1.890)
Turnout	-11.351** (4.423)
Electoral Management Body Capacity	4.751*** (0.995)
Adjusted R ²	0.851
N	73

F(11, 61) = 38.255, $p < .001$, $R^2 = 0.873$. Notes. ***, **, * denote the rejection of the null hypothesis at 1%, 5% and 10% significance level respectively.

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APPENDIX

Appendix A: African Union and European Union elections and referendums (February 2020 to December 2021)

TABLE A1: EU AND AU MEMBER STATES WITH NATIONAL ELECTIONS OR REFERENDUMS

EUROPEAN UNION 14 Nations / 23 Electoral Episodes	AFRICAN UNION 29 Nations / 53 Electoral Episodes	
Bulgaria	Algeria	Côte d'Ivoire
Croatia	Benin	Liberia
Cyprus	Burkina Faso	Madagascar
Czechia	Burundi	Malawi
Germany	Cameroon	Mali
Ireland	Cabo Verde	Morocco
Italy	Central African Republic	Niger
Lithuania	Chad	Republic of the Congo
The Netherlands	Comoros	São Tomé and Príncipe
Poland	Djibouti	Seychelles
Portugal	Egypt	Tanzania
Romania	Ethiopia	Togo
Slovakia	Gambia	Uganda
Slovenia	Ghana	Zambia
	Guinea	

TABLE A2: ELECTIONS AND REFERENDUMS IN EU

EU	
2020	2021
Croatia Parliamentary Election ▲ T	Bulgaria Parliamentary Election (Apr) ≤ T
Czechia Parliamentary Election (Senate Election 1st Round) ▲	Bulgaria Parliamentary Election (Jul) ▲ T
Czechia Parliamentary Election (Senate Election 2nd Round) ▲	Bulgaria Parliamentary Election (Nov) ≤ T
Ireland General Election ≤ T	Bulgaria Presidential Election (1st Round) ≤ T
Ireland Senate Election ▲	Bulgaria Presidential Election (2nd Round) ≤ T
Italy Referendum ▲	Cyprus Legislative Election ≤ T
Lithuania Parliamentary Election (1st Round) ▲ T	Czechia Legislative Election ▲ T
Lithuania Parliamentary Election (2nd Round) ▲	Germany Federal Election ≤ T
Poland Presidential Election (1st Round) ≤ T	Netherlands General Election ▲
Poland Presidential Election (2nd Round) ▲	Portugal Presidential Election ≤ T
Romania Parliamentary Election ≤ T*	Slovenia Referendum ▲
Slovakia Parliamentary Election ▲ T	
23 ELECTORAL EPISODES	
Covid-19 cases increased 14-day after election ▲ (13)	
Covid-19 cases decreased or no change 14-day after election ≤ (10)	
Government / Legislative Leadership Turnover T	
*Romania's Parliamentary Election (Senate and the Chamber of Deputies) was counted as one electoral episode, but data about each of the chambers in this election were entered into the regression models independently.	

TABLE A3: ELECTIONS AND REFERENDUMS IN AU

AU	
2020	2021
Algeria Referendum ▲	Algeria Legislative Election ▲
Burkina Faso Parliamentary Election ▲	Benin Presidential Election ≤ T
Burkina Faso Presidential Election ▲	Cabo Verde Parliamentary Election ▲
Burundi Legislative Election ≤ T	Cabo Verde Presidential Election ≤ T
Burundi Presidential Election ≤ T	Central African Republic Legislative Election (2nd Round) ▲
Cameroon Parliamentary Election (Reruns) ▲	Chad Presidential Election ▲
Cameroon Senate Election ≤ T	Djibouti Presidential Election ≤ T
Central African Republic Parliamentary Election ▲	Ethiopia Parliamentary Election (Jun) ≤ T
Central African Republic Presidential Election (1st Round) ▲	Ethiopia Parliamentary Election (Sept) ≤ T
Comoros Parliamentary Election (2nd Round) ≤ T	Gambia Presidential Election ▲
Egypt House of Representatives Election (First Phase) ▲	Côte d'Ivoire Parliamentary Election ▲ T
Egypt House of Representatives Election (Second Phase) ▲	Morocco General Election ≤ T
Egypt Senate Election (1st Round) ≤ T	Niger Presidential Election (2nd Round) ≤ T
Egypt Senate Election (2nd Round) ≤ T	Republic of The Congo Presidential Election ≤ T
Ghana Presidential Election ▲	São Tomé and Príncipe Presidential Election (1st Round) ▲
Ghana Parliamentary Election ▲	São Tomé and Príncipe Presidential Election (2nd Round) ▲ T
Guinea Presidential Election ≤ T	Uganda Presidential Election ≤ T
Guinea Referendum ▲	Uganda Parliamentary Election ≤ T
Guinea Parliamentary Election ▲	Zambia Presidential Election ≤ T
Côte d'Ivoire Presidential Election ≤ T	Zambia National Assembly Election ≤ T
Liberia Parliamentary Election ▲	
Liberia Referendums (8 Ballots) ≤ T*	
Madagascar Parliamentary Election ▲	
Malawi Presidential Election ▲ T	
Mali Parliamentary Election (1st Round) ▲ T	
Mali Parliamentary Election (2nd Round) ▲ T	
Niger Presidential Election (1st Round) ≤ T	
Niger National Assembly Election ≤ T	
Seychelles Parliamentary Election ≤ T	
Seychelles Presidential Election ≤ T	
Tanzania Presidential Election ≤ T	
Tanzania National Assembly Election ≤ T	
Togo Presidential Election ≤ T	
53 ELECTORAL EPISODES	
Covid-19 cases increased 14-day after election ▲ (25)	
Covid-19 cases decreased or no new cases 14-day after election ≤ (28)	
Government / Legislative Leadership Turnover T	
*Liberia's Referendum (8 Ballots) was counted as one electoral episode, but data about each of the ballot were entered into the regression models independently.	

TABLE A4: REGIMES STATUS OF EU AND AU AS OF 2022

	AU	EU	Total
Freedom House*			
Free	4	14	18
Partly Free	13	0	13
Not Free	12	0	12
Regime Type (Regimes of the World)#			
Liberal Democracies	1	8	9
Liberal Democracy	1	4	5
Liberal Democracy Lower Bound	0	4	4
Electoral Democracies	8	6	14
Electoral Democracy Upper Bound	2	2	4
Electoral Democracy	4	4	8
Electoral Democracy Lower Bound	2	0	2
Electoral Autocracies	16	0	16
Electoral Autocracy Upper Bound	1	0	1
Electoral Autocracy	14	0	14
Electoral Autocracy Lower Bound	1	0	1
Closed Autocracies	4	0	4
Closed Autocracy Upper Bound	0	0	0
Closed Autocracy	4	0	4

Source: *Freedom House (2023); #Papada et al. (2023).

TABLE A5: DISTRIBUTION OF REGIME TYPES IN EUROPEAN UNION, 2020 AND 2022

	2020	2022
Bulgaria	Electoral Democracy	Electoral Democracy
Croatia	Electoral Democracy	Electoral Democracy
Cyprus	Liberal Democracy Lower Bound	Liberal Democracy Lower Bound
Czechia ▲	Electoral Democracy	Liberal Democracy
Germany	Liberal Democracy	Liberal Democracy
Ireland	Liberal Democracy	Liberal Democracy
Italy	Liberal Democracy Lower Bound	Liberal Democracy Lower Bound
Lithuania	Electoral Democracy Upper Bound	Electoral Democracy Upper Bound
The Netherlands	Liberal Democracy	Liberal Democracy
Poland	Electoral Democracy	Electoral Democracy
Portugal ▼	Liberal Democracy	Liberal Democracy Lower Bound
Romania	Electoral Democracy	Electoral Democracy
Slovakia	Electoral Democracy Upper Bound	Electoral Democracy Upper Bound
Slovenia	Liberal Democracy Lower Bound	Liberal Democracy Lower Bound
Regime Type ▲ Upgraded (1) ▼ Downgraded (1)		
Freedom House Ranking in 2022: Free (14), Partly Free (0), Not Free (0)		

Source: Freedom House (2023); Papada et al. (2023).

TABLE A6: DISTRIBUTION OF REGIME TYPES IN AFRICAN UNION, 2020 AND 2022 (1/2)

	2020	2022
Algeria	Electoral Autocracy	Electoral Autocracy
Benin	Electoral Autocracy	Electoral Autocracy
Burkina Faso ▼	Electoral Democracy	Electoral Autocracy
Burundi	Electoral Autocracy	Electoral Autocracy
Cameroon	Electoral Autocracy	Electoral Autocracy
Cabo Verde	Electoral Democracy	Electoral Democracy
Central African Republic	Electoral Autocracy	Electoral Autocracy
Chad ▼	Electoral Autocracy	Closed Autocracy
Comoros	Electoral Autocracy	Electoral Autocracy
Djibouti	Electoral Autocracy	Electoral Autocracy
Egypt	Electoral Autocracy Lower Bound	Electoral Autocracy Lower Bound
Ethiopia	Electoral Autocracy	Electoral Autocracy
Gambia ▲	Electoral Autocracy Upper Bound	Electoral Democracy Upper Bound
Ghana ▼	Electoral Democracy Upper Bound	Electoral Democracy
Guinea ▼	Electoral Autocracy	Closed Autocracy
Côte d'Ivoire	Electoral Autocracy	Electoral Autocracy
Liberia	Electoral Democracy	Electoral Democracy

TABLE A6: DISTRIBUTION OF REGIME TYPES IN AFRICAN UNION, 2020 AND 2022 (2/2)

	2020	2022
Madagascar ▼	Electoral Democracy Lower Bound	Electoral Autocracy Upper Bound
Malawi ▲	Electoral Democracy Lower Bound	Electoral Democracy Upper Bound
Mali ▼	Electoral Autocracy	Closed Autocracy
Morocco	Closed Autocracy	Closed Autocracy
Niger	Electoral Democracy Lower Bound	Electoral Democracy Lower Bound
Republic of the Congo	Electoral Autocracy	Electoral Autocracy
São Tomé and Príncipe	Electoral Democracy	Electoral Democracy
Seychelles	Liberal Democracy	Liberal Democracy
Tanzania	Electoral Autocracy	Electoral Autocracy
Togo ▼	Electoral Autocracy Upper Bound	Electoral Autocracy
Uganda	Electoral Autocracy	Electoral Autocracy
Zambia ▲	Electoral Autocracy	Electoral Democracy Lower Bound
Regime Type ▲ Upgraded (3) ▼ Downgraded (7)		
Freedom House Ranking in 2022: Free (4), Partly Free (13), Not Free (12)		

Source: Freedom House (2023); Papada et al. (2023).

Appendix B: Description of the variables used in the regression models (1/2)

Variable	Description	Details
Dependent Variables		
14-Day Incidents after Poling Day (logged)	Natural logarithm of the total number of reported Covid-19 cases during the 14 days period after election / population * 100000.	Figures from Our World in Data cross-checked with independent reports available.
Voter Turnout	The percentage of eligible voters who cast their ballot.	Official figures cross-checked with independent news and observation reports available.
Perceptions of Electoral Integrity (PEI)	A score (0-100) that evaluates how well countries' electoral processes meet international standards of electoral integrity.	Data from Electoral Integrity Project, Harvard Dataverse. See Garnett 2023.
Independent Variables		
14-Day Incidents before Poling Day (logged)	Natural logarithm of the total number of reported Covid-19 cases during the 14 days period before election / population * 100000.	Figures from Our World in Data cross-checked with independent reports available.
Covid-19 Vaccine Doses Administered (% of Population)	Percentage of people who received at least one dose of COVID-19 vaccine as of the day of election.	Data from Our World in Data.
Regime Type	The political regime classification by considering the competitiveness of access to power (polyarchy) as well as liberal principles: 0-9, where 0 means the regime classified as closed autocracy, 9 means the regime classified as liberal democracy.	Data from Varieties of Democracy Project (V-Dem), see Coppedge 2024.
Liberal Democracy Index	A scale of 0 to 1 that evaluates how well the ideal of liberal democracy achieved.	Data from Varieties of Democracy Project (V-Dem), see Coppedge 2024.
Electoral Democracy Index	A scale of 0 to 1 that evaluates how well the ideal of electoral democracy in its fullest sense achieved	Data from Varieties of Democracy Project (V-Dem), see Coppedge 2024.
Stringency Index	A composite score (0-100) that normalizes how many government measures were in place as of the day of election.	Oxford COVID-19 Government Response Tracker (OxCGRT), Blavatnik School of Government, University of Oxford.

Appendix B: Description of the variables used in the regression models (2/2)

Variable	Description	Details
Independent Variables		
Cancel of Public Events	A component of the Government Response Index: 0-2, where 0 means no restriction, 2 means require cancelling of public events.	Same as above.
Stay Home Requirement	A component of the Government Response Index: 0-3, where 0 means no restriction, 3 means require not leaving house with minimal exceptions (allowed to leave once a week, or only one person can leave at a time, etc).	Same as above.
Restriction on Gathering	A component of the Government Response Index: 0-4, where 0 means no restriction, 4 means restrictions on gatherings of 10 people or less.	Same as above.
State of Emergency Index	National state of emergency was in place at any point at the election year, 0 means no state of emergency in place, 1 means a national state of emergency was in place due to natural disaster/ terrorist attack/ armed conflict/war/ mass protest/popular uprising or other reasons.	Data from Varieties of Democracy Project (V-Dem), see Coppedge 2024.
Corruption Perceptions Index (CPI)	A score (0-100) that evaluates the perceived levels of public sector corruption, 0 means highly corrupt, 100 means very clean.	Data from Transparency International.
Perceptions of Electoral Integrity (PEI)	A score (0-100) that evaluates how well countries' electoral processes meet international standards of electoral integrity.	Data from Electoral Integrity Project, Harvard Dataverse. See Garnett 2023.
EMB Capacity	The extent that the Election Management Body (EMB) have sufficient staff and resources to administer a well-run national election. The values (0 to 4) are converted into an interval scale -5 to 5, where -5 means glaring deficits in staff, financial, or other resources affecting the organization across the territory, 5 means the EMB has adequate staff and other resources to administer a well-run election.	Data from Varieties of Democracy Project (V-Dem), see Coppedge 2024.
Special Voting Arrangements	Early voting, Proxy voting, In-country postal voting, Mobile ballot box, and Overseas Voting: 0 = No special voting arrangement in place, whereas 1 = introduced at least one of special voting arrangements.	Information from electoral management bodies, cross-checked with independent news and observation reports available.

Appendix C: Countries and electoral episodes not accounted for in regression models

Countries	Data Not Available	Reliability of Data In Doubt	Electoral Episodes Concerned
Cameroon	Turnout		Parliamentary Election Re-runs in Anglophone Regions
Comoros	OxCGRT		Parliamentary Elections (Round 1 and Round 2)
Central African Republic	Turnout		National Assembly Election
Seychelles	PEI		Parliamentary and President Elections
Slovakia		Infection cases	National Council Election
Tanzania		Infection cases	Presidential and General Assembly Election
Togo		Infection cases	Presidential Election
Sao Tome and Principe	OxCGRT		Presidential Election (Round 1 and Round 2)



VPLIV COVID-19 NA VOLILNO ARENO IN SPREMEMBO OBLASTI: DOKAZI IZ EVROPE IN AFRIKE

V kolikor je bila pandemija Covid-19 moteča sila, ki je spodkopala vladovanje med režimi, naj bi svetovna zdravstvena kriza še pospešila procese nazadovanja demokracije in pospešila procese avtokratizacije. Medtem ko je bil zaznan globalni trend nazadovanja, je prispevek motiviran z opažanji, da (a) je prišlo do močnega odpora med demokracijami proti neliberalnemu populizmu in (b) da je bilo malo storjenega za preučevanje odpornosti in/ali krhkosti avtokratskih režimov, katerih prirojene slabosti je razkrila pandemija. S pomočjo novorazvitega nabora podatkov, ki zajema volitve in referendumе po Evropi in Afriki na nacionalni ravni v letih 2020 in 2021, je temeljni prispevek članka dvojen: (1) ugotoviti, kateri dejavniki so ublažili povzročena zdravstvena in politična tveganja zaradi pandemije ne glede na vrste režimov na obeh kontinentih in (2) izkoristiti najrazličnejše zasnove sistemov, da bi osvetlili ne le obseg, v katerem je kriza negativno vplivala na volilno integriteto, ampak tudi, koliko in zakaj so bile med pandemijo (pre)obremenjene države evropske in afriške unije.

Ključne besede: Covid-19; volitve; demokratično nazadovanje; avtokratizacija; javno zdravje; tveganje.



THE ANTI-CRISIS SHIELDS AS A MEANS OF CONSOLIDATING POWER. THE CASE OF THE LAW AND JUSTICE GOVERNMENT IN POLAND

Michał JACUŃSKI¹

In Poland, the pandemic coincided with and exacerbated the existing rule of law crisis, which had been ongoing for several years. The paper explores the Polish government's response to the COVID-19 pandemic through public policy tools known as Anti-Crisis Shields (ACS). These shields, initially designed to mitigate the pandemic's negative economic impact, were also used by the right-wing Law and Justice (PiS) party as a strategic instrument to consolidate political power. By analysing government's promotional content and policy implementation during the pandemic, the paper reveals how the government leveraged economic aid to strengthen its electoral base and reinforce its authority. The research addresses questions about the instrumentalisation of public policies for political gain, the manipulation of crisis narratives, a turbulent election campaign and the effects on democratic backsliding in Poland. Ultimately, the paper discusses how crisis management, when politically driven, can undermine democratic norms and accountability.

Key words: anti-crisis shield; power consolidation; democratic backsliding; Law and Justice party.

1 INTRODUCTION

Anti-crisis shields, also known as economic or financial shields, play a critical role in stabilising economies during periods of severe economic downturns or crises. These shields are government-led initiatives designed to protect businesses, employees, and the broader economy from the negative impacts of financial

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crises, such as those caused by economic recessions, pandemics, or geopolitical events. This was also the case in the context of the global pandemic caused by the SARS-CoV-2². A considerable number of countries introduced comprehensive anti-crisis shields. By way of illustration, the European Union introduced the Next Generation EU (NextGenerationEU 2024) recovery plan, which included grants and loans to member states with the objective of supporting economic recovery, with a particular focus on green and digital transitions. Similarly, the United States implemented the Coronavirus Aid, Relief, and Economic Security (CARES Act 2024), which provided direct payments to citizens, unemployment benefits, and loans to businesses. In Poland, the Law and Justice government imposed a series of extensive restrictions during the initial phase of the epidemic response. These measures not only caused social distress and frustration but also led to a deceleration in economic activity. Subsequently, the government implemented image restoration strategies (Benoit 1997, 179), including compensation mechanisms and corrective actions in the form of state financial aid, which was politically branded as the Anti-Crisis Shield (Tarcza Antykryzysowa).

A review of economic and political economy literature reveals that the 2007-2009 financial crisis had a detrimental impact on the SME sector, potentially precipitating another economic crisis (Carbo-Valverde, Rodriguez-Fernandez and Udell 2016). It has been therefore assumed that the crisis caused by the SARS-CoV-2 pandemic created risks for the activities of SMEs and posed a significant threat to the labour market. The government in Poland and elsewhere was thus confronted with the challenge of mitigating the adverse effects of restrictions that had a detrimental impact on national economies and global economic systems, while preventing a recession. The health, social and economic challenges were rapidly eclipsed and subsumed by the political agenda and the political events that occurred.

The objective of this article is to provide answers to the following research questions: 1) What economic instruments did the Polish government deploy to engage with the electorate during the pandemic? 2) To what extent did the political context associate with the election cycle influence government policy? 3) What narrative structures were constructed in the communication materials promoted by the government and government-controlled public bodies? 4) To what extent did the government's policies and communication practices serve instrumental, ongoing political goals with the objective of consolidating power? The paper's objectives are closely tied to the widely discussed concept of democratic backsliding³ (e.g. Grillo et al. 2023; Levitsky and Ziblatt 2018; Wunsch and Blanchard, 2022), as it examines how the Polish government under the Law and Justice (PiS) party used crisis management tools, such as the Anti-Crisis Shields (ACS), to consolidate power. This connection is evident in several ways: instrumental use of public policies, influence of the electoral cycle, narrative manipulation and erosion of democratic norms.

To meet paper's objectives a method of narrative analysis was used to study how ruling government constructed, communicated, and promoted specific narratives to the public through official statements and owned media content.

² SARS-CoV-2 - Severe Acute Respiratory Syndrome Coronavirus 2, further referred to as coronavirus.

³ The concept of democratic backsliding has been a significant topic of discussion in academic journals, particularly in light of the growing concerns surrounding the global state of democracy in recent years. The core debates concern the definition of the phenomenon, the identification of its causes, the understanding of its mechanisms, and the exploration of its consequences.

The research examined also the government's support programmes for businesses and households in response to the Coronavirus pandemic. Government narrative analysis is used to explore how the Polish government, under the Law and Justice (PiS) party, framed the Anti-Crisis Shields as a means of crisis management during the COVID-19 pandemic. The analysis examines promotional videos, government websites, and public statements to reveal how the PiS government portrayed itself as a protector of the economy and society, while also subtly advancing its political agenda by reinforcing its image, suppressing opposition, and consolidating its power. Through this method, the paper uncovers how the government used crisis communication as a political tool leading to further democratic backsliding. Narrative analyses can help identify and understand the dynamics of backsliding by uncovering manipulative framing, exposing selective messaging or revealing the use of crisis to justify power consolidation. A government narrative structures analysis was conducted on nearly 20 promotional and informational videos pertaining to government Anti-Crisis Shields programs and four government websites were analysed.

2 WHEN OPPORTUNITY MAKES THE THIEF

Crises can be exploited by governments to take advantage of exceptional circumstances for personal or political gain. In the context of democratic governance, a crisis such as a pandemic, economic downturn (effects of the pandemic) or security threat (war in Ukraine) creates a unique opportunity for leaders to consolidate power, weaken democratic institutions, or erode civil liberties. This exploitation of crises for political purposes is what transforms "opportunity" into a "thief," as it steals democratic norms and public trust.

From a theoretical standpoint, the management of a crisis may have several adverse implications for democracy. In certain instances, governments may exploit crises as a means of consolidating or centralising power, which could potentially result in the erosion of democratic norms. For instance, the proclamation of a state of emergency may occasionally result in the suspension of specific democratic procedures or the circumvention of legislative bodies, which could potentially diminish the efficacy of checks and balances. A further negative impact on the quality of democracy is the reduction in accountability. The hasty and imprudent implementation of anti-crisis measures can, on occasion, result in a deficiency of transparency and a diminution of accountability on the part of those in authority. In the absence of adequate public oversight, the implementation of anti-crisis measures may give rise to instances of corruption or the misuse of funds, which could have a detrimental impact on the quality of democratic governance. The implementation of public policies in response to a crisis may result in an unequal distribution of resources. If anti-crisis measures are not meticulously devised, they may intensify pre-existing inequalities, conferring advantages upon specific groups while disadvantaging others. This can result in a loss of public confidence in democratic institutions, leading to the perception that the government serves the interests of a selected few, rather than the broader population or specific groups within its electorate. In periods of crisis, there is a potential for civil society organisations (CSOs) to be marginalised in decision-making processes or for political opposition to be muted in public debate. This can have the effect of weakening the democratic principle of pluralism. The marginalisation of CSOs or opposition groups can result in a reduction in the diversity of voices present in the public discourse. Finally, the utilisation of anti-crisis measures to justify the erosion of democratic norms has

the potential to contribute to a phenomenon known as 'democratic backsliding'. This is a particularly troubling prospect in national contexts where democratic institutions are already vulnerable. Following the electoral victory of PiS in 2015, Poland embarked on an illiberal trajectory, with the erosion of democratic norms continuing apace. Consequently, the management of the crisis may give rise to several adverse effects, leading to a deterioration in the quality of democracy.

The theoretical assumptions are corroborated by expert opinions. Notable international research centres on democracy, including Freedom House (Repucci and Slipowitz 2020), IDEA (2021), V-Dem (Edgell et. al. 2020) and the Economist Intelligence Unit (2020), have expressed concern that the pandemic may have a detrimental impact. As evidenced in their reports, there has been a decline in democratic indicators in 2020. Furthermore, it is posited that this phenomenon is a consequence of the misuse of authority in states that were previously non-democratic prior to the advent of the pandemic. The issues primarily pertain to the implementation of safety protocols to contain the spread of the novel coronavirus and the infringement upon several civil liberties, including the freedom of the press. In Poland, the situation was further complicated by the fact that the presidential election was scheduled to take place just two months after the onset of the pandemic. This created an opportunity for the organisation of elections that circumvented legal and constitutional principles. As Bermeo (2016) notes, one of the key characteristics of democratic backsliding is the undermining of the free and fair nature of elections through the introduction of illegal changes to the legal framework governing them. This shift towards an electoral democracy represents a significant challenge to the principles of liberal democracy.

In terms of the context of communication, the implementation of Anti-Crisis Shields and other anti-crisis measures created an opportunity to promote the government and its efficiency. This was an unsurprising development in Poland, where the government has a history of utilizing public media and a range of crises and pseudo-crises as instruments of political propaganda. This has manifested in several ways, including the promotion of the government before elections, the provision of selective support for aligned voters, the marginalisation of the opposition, and the extended ability to manage the narrative surrounding the crisis. The ruling party in Poland, Law and Justice (PiS), has been accused of utilising the Anti-Crisis Shields as a means of advancing its political agenda. The government's communication strategy surrounding the anti-crisis shields frequently emphasised the party's role in safeguarding the economy and citizens, at times portraying the government as a robust and resolute force during the crisis. The success of the anti-crisis measures was frequently emphasised by state-controlled media, government officials and state-owned agencies, firms and institutions. This framing served to demonstrate the government's competence and to justify continued public support for the ruling party. It has been alleged that the distribution of funds from the Anti-Crisis Shields was not always conducted in an impartial manner. Those with a critical perspective (Supreme Audit's Office, Polish Economic Institute) have suggested that businesses and regions with political ties to the ruling party were on occasions the recipients of preferential treatment, whereas those less aligned with PiS encountered greater difficulties in accessing support. Moreover, financial aid focused on temporary measures and failed to invest in long-term economic resilience, leaving SMEs vulnerable. Such selective distribution of aid can be viewed as a strategy for consolidating political power, whereby those who demonstrate loyalty are rewarded while opposition is punished. This is a

common tactic employed in political propaganda, when reinforcing a narrative of competence and leadership limits opposition voices. The government's narratives frequently excluded the role of opposition parties, portraying them as obstructive or unhelpful during the crisis. In this way, the government sought to enhance its reputation as the primary defender of national interests during periods of adversity, a strategy commonly employed in propaganda. The government's control over public media enabled it to influence the narrative surrounding the Anti-Crisis Shields. By focusing on positive outcomes and downplaying any criticisms or shortcomings, the government was able to influence public perception, thereby presenting the shields as a major success of the PiS administration.

3 POLITICAL RATIONALE FOR INTRODUCING ACS BEFORE AND DURING THE 2020 PRESIDENTIAL ELECTIONS

The political landscape in Poland began to shift several months prior to the onset of the epidemic. Although the PiS party was successful in winning the majority in parliament and forming a government following the parliamentary elections in the autumn of 2019, the upper house of parliament, the Senate, was taken over by the opposition, which proceeded to appoint the Speaker of the Senate. Following several years of independent rule by the PiS party, an institutional and political counterpoint emerged, which was likely to complicate the governance process. The indications of a decline in authority in the context of the approaching presidential election in 2020 necessitated the undertaking of supplementary efforts by the incumbent administration. The shifting balance of power prompted the PiS to pursue the objective of retaining the presidency, an influential role previously occupied by Andrzej Duda from PiS from 2015. For the PiS, ensuring the swift re-election of the incumbent assumed great importance, a goal that acquired new significance with the advent of the pandemic (Jacunski 2021, 280). For the opposition, the presidential election also held significant importance. The election presented an opportunity to challenge the political dominance of the PiS party and advance other political objectives associated with the strategic plans of emerging political competitors. Additionally, Szymon Hołownia and his party, Polska 2050, as well as Krzysztof Bosak of the Konfederacja, were involved. A significant point of contention emerged regarding the date and manner of conducting the elections, which gave rise to a political and constitutional crisis. The five-year term of Andrzej Duda was due to conclude on 6 August 2020. The first round of elections could have been held on a weekday between 28 April and 23 May 2020, while the second round would have been scheduled for between 12 May and 6 June 2020. PiS was resolute in its intention to proceed with the scheduled elections. In the initial phase of the opinion polls, incumbent President Andrzej Duda was shown to enjoy considerable and increasing levels of support. Sula et al. have elucidated (2021, 30) that Law and Justice had justifiable concerns that the government's pandemic response would rapidly lose support as mortality rates increased and the economic impact became evident. Consequently, the government resolved to modify the obligatory election-oriented stipulations and refrain from postponing the electoral process. During the lead-up to the presidential elections, the PiS government emphasized its role in safeguarding the nation against the dual crises of the COVID-19 pandemic and the economic downturn.

The elections were scheduled for 10 May 2020. Meanwhile, since 20 March 2020, a plethora of restrictions have been in place, including, for example, the

prohibition of assembling or free movement of people, which one can recognize as an abuse of a democratic principles and non-direct deprivation of a right to protest. This had significant implications for the course and implementation of the basic functions of elections. Consequently, in the context of the ongoing epidemiological crisis associated with the novel coronavirus in Poland, several voices have emerged, both among the candidates in the electoral process and among constitutional experts, advocating for the postponement of the scheduled elections. Michalak (2020, 6) posited that "during an epidemic of the novel coronavirus and the associated restrictions imposed by the state of epidemic, it is practically unfeasible and entails a multitude of legal and organisational complications." The Ombudsman highlighted that conducting the elections in the scheduled timeframe would constitute a violation of the health and lives of the citizens (Bodnar 2020). The Supreme Court ruled that it would be impossible to collect the requisite 100,000 signatures in support of a candidate as directed by the PKW in the context of a pandemic. The question of the legality of the elections was a prominent topic of discussion in both the public sphere and the academic community (Matczak 2020; Pyrzyńska 2022). Furthermore, legal experts have observed that, in the current legal framework, there is no explicit provision enabling the alteration of the scheduled date of elections that have already been convened within the course of a term. The incumbent administration sought to hold the elections in accordance with the legal deadline. In mid-April 2020, the Prime Minister entrusted the Polish Post with the task of preparing and carrying out the necessary actions for the organisation of the 2020 presidential elections, which were to be held in a postal voting system due to the prevailing pandemic circumstances. This situation was without precedent, as elections in Poland are conducted exclusively in a stationary mode. The transfer of responsibility for the organisation of what are known as 'envelope elections' gave rise to considerable opposition from numerous local government officials, who were unwilling to transfer the data of electors to the state postal operator. Meanwhile, one of the presidential candidates revealed the contents of the electoral campaign material, which had been leaked from one of the printing plants. This included copies of the electoral cards with the candidates' names and a form for voters to complete their details. The events, in conjunction with the lack of preparedness for the electoral process, resulted in a situation wherein the State Electoral Commission formally declared the impossibility of casting votes for candidates and appealed to the Marshal of the Sejm regarding the organisation of new elections, which were duly scheduled for 28 June 2020. A total of 11 candidates were registered for the presidential election in Poland. The elections were conducted in a hybrid manner. The default option would be traditional in-person voting; however, an alternative option for voting by post remained available. The competitive nature of the political process resulted in a second round of voting, in which the incumbent President of the Republic, Andrzej Duda, representing the right-wing camp, and Rafał Trzaskowski, representing the opposition, participated. President Duda emerged as the winner of the election, securing a margin of approximately 2% in terms of popular support over his rival. The victory and subsequent re-election of the incumbent president, who is associated with the ruling political party, did not result in a reduction of political conflict in Poland; on the contrary, it contributed to the intensification of the existing political crisis. In the autumn of 2020, the government was confronted with a dual challenge: the public health crisis caused by the pandemic and the political crisis resulting from the confrontation with anti-government protests. These challenges were compounded by internal conflicts within PiS (Pytlas 2021, 350). The Polish population demonstrated scepticism regarding the necessity of implementing numerous restrictions in the context of observing political and governmental

events, as well as the management of the pandemic. The results of the survey (Duszyński et al. 2020, 43–44) indicate a clear discrepancy between the objective reality and the perception of danger. During the electoral period, the government's messaging and decision-making processes were not entirely consistent, which may have led to perceptions that the government was overreacting and sowing unnecessary panic. In May 2020, approximately one-third of respondents indicated that they held such an attitude.

An evaluation of the government's actions in response to the pandemic confirms a critical attitude towards the government and the polarisation of opinions. In 2022, following the lifting of the threat, over half of respondents evaluated the implemented actions and their efficacy negatively (including almost 29% who expressed a definitive negative opinion), while approximately 30% of participants in the survey provided positive assessments in this regard. Conversely, approximately 16% of respondents did not provide a definitive response (Wojnicki 2022, 26). Furthermore, in the same study, over half of the respondents assessed the functioning of democracy in contemporary Poland as unsatisfactory (*ibidem*, 16). It must be noticed though, that the distrust to information related to coronavirus was pretty high across many other countries, too. Freedom House report survey data from 192 countries shows that majority (62%) survey respondents distrusted national governments in that respect.

4 ANTI-CRISIS SHIELDS IN POLAND

The Polish government has initiated the implementation of an aid programme, designated the Anti-Crisis Shield (ACS), which encompasses a series of measures designed to address the challenges posed by the ongoing pandemic. The package of solutions, prepared by the government, is designed to address the potential emergence of a crisis caused by the coronavirus pandemic. The government has identified three principal objectives of the legislative package that constitutes the Anti-Crisis Shields. These are: (1) the protection of employment, (2) the reduction of burdens and (3) the preservation of liquidity in companies (Tarcza Antykryzysowa, 2020). Anti-crisis programmes have been developed by a number of government departments and agencies, including the Ministry of Health, the Ministry of Development, the Ministry of Family, Labour and Social Policy, the Ministry of Finance, the Social Insurance Institution, the National Health Fund, the Polish Development Fund, as well as the Ministries of Internal Affairs and Administration, Education and Science, and other central agencies. These programmes commenced the process of becoming legally binding as early as March 2020, thereby forming the basis for the crisis management strategy. In addition to public health institutions, other agencies under the control of the ruling party were included in the implementation of the anti-crisis programmes. The National Bank of Poland, the National Development Bank, Pekao Polish Bank, the Polish Development Fund, the Social Insurance Institution, the Ministry of Development, Labour and Technology, the Industrial Development Agency and other central institutions were also involved.

The government solutions introduced in connection with the 2019 novel coronavirus (Covid-19) pandemic in Poland came into force on 1 April 2020 (Shield 1.0). Subsequent iterations of the Shield were introduced in 2020, including 2.0 (April), 3.0 (May), 4.0 (June), 5.0 (September), and 6.0 (December). In 2021, the seventh iteration of the Shield (January), eighth (February) and ninth (April) versions were implemented. As calculated by Kubiczek and Derej

(2022, 43–47), the total number of instruments designed to support the SME sector in Poland alone was approximately 80. The introduction of the package was intended to provide economic, business and employment support during the pandemic. The Shields encompassed five domains of intervention: health protection, job protection and workers' safety; public investment; strengthening the financial system; and financing for entrepreneurs. The estimated budget of the ACS is PLN 312 billion, while a report by the Polish Economic Institute indicates that the total amount of ACS support in 2020 was PLN 162.9 billion (Dębkowska et al. 2021).

The Anti-Crisis Shields introduced between 2020 and 2022 were related to the pandemic. Their objective was to mitigate the effects of the reduction in activity across numerous sectors of the economy. Over the course of approximately two years, successive iterations of the shields encompassed new sectors of economic activity, the scope of beneficiaries was expanded, and the shortcomings of previous solutions were addressed. In 2022, the outbreak of war in Ukraine led to the emergence of new challenges for the Polish economy and society. These included the intensification of the inflationary pressure and the onset of a migration crisis, characterised by a significant influx of individuals fleeing Ukraine due to the ongoing conflict. The government is resorting to a well-established image and political instrument, namely the announcement of further shields. One of the initial measures introduced was the Anti-Inflation Shield (AIS), comprising a series of measures implemented in February 2022. The package includes a zero-rate VAT on food items, with the objective of providing citizens with some respite from the effects of the prevailing inflationary pressures. However, the government does not attribute inflation and other negative economic phenomena solely to its own decisions or internal conditions. Instead, it increasingly points to Russian aggression as a primary cause. The rationale for the introduction of the AIS asserts that "in the fight against inflation and the crisis caused by Russia, the most important thing for us is to protect the wallets of Poles."⁴ (web2). Another shield introduced by the government is the Government Energy Shield (GES). The rationale for this shield reiterates the government's stance on Russia, stating that "Russian energy blackmail against Europe has caused fuel and raw material prices to skyrocket in a short period of time, thus making system heat more expensive too." It is our intention to safeguard you and your loved ones from the adverse consequences of the crisis. It is why we are making improvements to the price cap mechanism (web1).

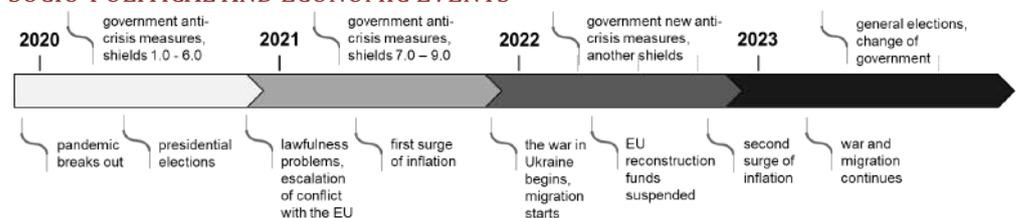
The PLN 3,000 coal allowance was incorporated into the household budgets of those whose primary heating source was coal or coal-based fuels. Furthermore, the government introduced the shelter allowance, also referred to as the inflation allowance, which constituted a pivotal component of the government's AIS. This offset the rising costs of energy, gas and food. Approximately seven million households in Poland with the lowest incomes will be provided with support. Furthermore, the government announced the introduction of the Government Solidarity Shield (GSS), which was designed to protect households against significant increases in electricity prices. The government has indicated that the GSS will prevent most Polish households from experiencing any impact from electricity price increases. In essence, they will not perceive any change in their energy costs. Once again, the rationale behind the shield was to ascribe culpability to a specific exogenous entity and to absolve the government of responsibility for the prevailing circumstances. A new line of argument emerged, whereby responsibility for the rise in energy prices was attributed not only to

⁴ Government websites are referred to as web 1-4.

Russia, but also to the European Union: "At this time, we are bearing the financial burden of Europe's misguided energy and climate policies, as well as the repercussions of Russia's unscrupulous military aggression against Ukraine. In these challenging circumstances, our objective is to aid the Polish people, which is why we are implementing the Solidarity Shield. The objective of the shield is to safeguard the Polish population from the significant price increases that have already been observed. Such elevated costs are also incurred by citizens in all member states of the European Union. (web3)

To conclude, between 2020 and 2022, the government introduced a series of solution packages, grouped under the concept of the shield. The initial aim was to deal with the immediate consequences of the pandemic. However, the rationale subsequently shifted to include the war in Ukraine and the European Union's climate and energy policies. The following figure 1 presents a timeline of government action and related socio-political and economic events.

FIGURE 1: TIMELINE OF GOVERNMENT ANTI-CRISIS MEASURES AND IMPORTANT SOCIO-POLITICAL AND ECONOMIC EVENTS



Source: own elaboration.

5 GOVERNMENT NARRATIVE STRUCTURES ANALYSIS OF ANTI-CRISIS SHIELDS COMMUNICATION

The article was informed by the collection and analysis of audio-visual and textual content. The video corpus comprises 17 spots or statements, that promote government anti-crisis programmes and were published between 2021 and 2022. The video content was selected based on the identification of materials tagged #CrisisShield on YouTube. The broadcasters of these materials included political actors such as ministries, the prime minister's office, a political party, government agencies, and state-controlled banks and energy companies. The video sample comprised a diverse range of material published exclusively by various actors linked directly or indirectly to the government. Additionally, an analysis was conducted of government websites where source information on Anti-Crisis Shields was published.

In the videos, the verbal layer was transcribed, and a link was sought to categories that fit into the construction of an intervening welfare state with the dominant political position of PiS. This is in line with Sadurski's (2019) argument that persistent support for the populist Law and Justice party can be explained by its successful, if irrational, welfare policies.

The following analysis employs the concepts of frames and narratives. In the context of political communication, the use of frames is frequently observed as a means of influencing the way in which narratives are perceived by the public. The two concepts are closely related yet serve distinct functions in the construction of meaning and the shaping of perception. The interdependence of frames and narratives is a fundamental aspect of their relationship. Frames shape the context

in which a narrative is told, while narratives imbue frames with depth and meaning. While frames establish the context, narratives serve to reinforce and imbue the frames with life by offering concrete examples and emotional appeals. A frame can be defined as the underlying structure or lens through which a story, event, or idea is presented. Frames shape how an audience perceives an issue by emphasising certain aspects and downplaying others. A narrative, on the other hand, is a structured, coherent story with a beginning, middle, and end that conveys a specific message or moral. Narratives contain characters, events, conflicts, and resolutions. They tell a story by connecting events in a meaningful way and are more concrete than frames.

The principal categories of narrative framework identified in the analysis are as follows: 1) the state as a caregiver, 2) the state as a benefactor, and 3) the government as a protector. Tables 1-3 provide a summary of the above-mentioned framing categories, examples of narratives and their manifestations, and a brief interpretation. The concept of the state as a caregiver draws upon political theories pertaining to welfare state models, social democracy, and paternalism. The state apparatus established by PiS in 2015 has introduced a universal and widely available system of social welfare. This constitutes a contract between the government and the citizens. The narrative around caregiving focuses on the emotional, financial, and social well-being of the population. The government frames its interventions as swift, decisive, and essential in preventing a catastrophic collapse of the economy. Statements from officials and promotional materials emphasizes how early decisions prevented widespread economic ruin.

TABLE 1: NARRATIVE STRUCTURES ANALYSIS - FRAMING CATEGORY "STATE AS A CAREGIVER"

Examples of narratives and their manifestation	Interpretation
<p>1. Personal experience and testimonials "I [entrepreneur] was able to keep my employees and pay them regular salaries." (v1) "Thanks to government support programmes, we have maintained jobs" (v5, v12)</p> <p>2. Government action, reassurance „The Polish government responded [to the crisis] already in December by cutting taxes and excise duties (...) „We will help Poles in this difficult period (...) That is why M. Morawiecki's government has prepared the Anti-Inflation Shield 2.0 (...) so that the effects of the global crisis are felt as little as possible' (v11) „Crisis shield - timely assistance" (v12)</p> <p>3. Emotional and psychological impact "The shield gave me a sense of security" (v13)</p> <p>4. Avoidance and prevention "Thanks to the government's Crisis Shield, companies and workers will get through the current crisis safely. (...) We have saved millions of jobs." (v14) „Thanks to swift government decisions, Poland avoided the worst-case scenario" (v16) "If there had been no Anti-Crisis Shield, our business would no longer exist." (v17)</p>	<p>Each narrative structure contributes to a broader storyline that promotes the effectiveness and necessity of the Polish government's Anti-Crisis Shield and other support programs. The narratives vary from personal testimonials and emotional appeals to government-centric success stories, preventive narratives, and reassurance claims.</p> <p>This combination of structures creates a multifaceted message that aims to instil trust, gratitude, and support for the caregiving government's crisis management efforts.</p>

Source: own elaboration.

The frame of the state as a caregiver emphasized the government's paternalistic role in protecting citizens, fostering gratitude, trust, and loyalty to the ruling party. It portrayed the PiS government as indispensable, reinforcing its position as the saviour of the nation. The state as a benefactor provides targeted subsidies and support to key economic sectors. The government highlights its role in distributing resources. This narrative structure focused on the government's generosity and the tangible benefits provided to the aid-recipients. This framing painted the government as a benevolent provider of resources, underscoring its ability to take care of the population's economic needs.

TABLE 2: NARRATIVE STRUCTURES ANALYSIS - FRAMING CATEGORY "STATE AS A BENEFACTOR"

<p>1. Personal experience and testimonials "We are very satisfied. This is the first time we have received anything from the state." (v1)</p> <p>2. Cause-and-effect narrative „Thanks to the National Bank of Poland measures, loan instalments will be lower" (v2)</p> <p>3. Support "The package (...) is the largest scale of aid in Poland's modern history. (...) Above all, we must keep jobs. (...) We will therefore provide financial support." (v3)</p> <p>„Fortunately, financial subsidies have been put in place" (v4)</p> <p>4. Direct benefit and targeted beneficiary „We have introduced allowances for coal, for pellets and other biomass, for LPG, fuel oil, chunk wood" (v7)</p> <p>"We are introducing a shelter allowance that will benefit more than 7 million households" (v8)</p> <p>" Save 2,000 PLN on your electricity bill with the government's Solidarity Shield" (v15)</p>	<p>The narrative structures in these texts collectively present a comprehensive story of government intervention during a crisis, using various rhetorical techniques to convey effectiveness, satisfaction, scale, and targeted benefits.</p> <p>Direct benefit statements play a role in reinforcing a positive image of government action.</p> <p>The structure presents a causal and attribution narrative, build on a straightforward relationship between government action and a tangible benefit for the public.</p>
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Source: own elaboration.

By portraying itself as a benefactor, the PiS government could reinforce a sense of dependency on its leadership, positioning itself as the only force capable of delivering critical support during the crisis. The concept of the government as a protector is a fundamental tenet of modern governance. This highlights the government's obligation to guarantee security across a multitude of domains, including economic, health, and national security. The roles entail considerable challenges in maintaining equilibrium between protection, freedom, and citizens' empowerment. Protection should not be equated with paternalism or reinforce regressive tendencies. A protective metaphor prompts the audience to take a specific action ('reach for the crisis shield'), while the metaphor of a 'shield' suggests defence and safety. A shield is positioned as a necessary safeguard. The government as a protector frame reinforced its image as a strong and capable authority, stepping in to shield the country from external threats. By invoking metaphors of defence and solidarity, the government bolstered its role as an indispensable force in protecting Poland, both economically and socially.

TABLE 3: NARRATIVE STRUCTURES ANALYSIS - FRAMING CATEGORY "GOVERNMENT AS A PROTECTOR"

<p>1. Protective metaphor "Reach for the crisis shield to protect jobs and Polish companies" (v6)</p> <p>„We protect Polish families!" (v7)</p> <p>"We have saved millions of jobs." (v14)</p> <p>2. Comprehensive assurance "We protect Polish families, we cut taxes" (v10)</p> <p>3. Emotional and psychological reassurance "The shield gave me a sense of security" (v13)</p> <p>4. Solidarity "Government Solidarity Shield - together we protect against energy price increases" (v15)</p>	<p>The narrative structures in these texts utilize a combination of metaphorical language, collective and emotive appeals, and solidarity-focused messages to convey the government's reassurance role in crisis management and protection of citizens. The government acts as an effective and proactive protector.</p>
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Source: own elaboration.

A detailed examination of the narrative presented in the materials reveals that the focus is on the perspectives of the protagonists in relation to the solutions. The video materials employ both first-person (e.g., the Prime Minister, entrepreneurs) and third person (lector's voice-over) narrative voices. The nature of the material is indicative of the formula employed in the promotional videos, which typically comprise a brief, pre-recorded segment uploaded to a digital platform. The duration of the videos also corroborates this assessment, as they typically range from 15 to 60 seconds. The analysed videos exemplify a concise and targeted approach to messaging.

Several narrative structures were identified within the three main categories that the government was framed within. One of the narrative structures was related to personal experience and testimonials. This structure involved the sharing of a personal story in which the speaker benefited from government support. Another structure attributed the saving of jobs directly to government programmes or actions undertaken by other government-dependent actors. This is therefore an example of a cause-and-effect narrative. The PiS government highlighted its role in securing a safe passage through a crisis for companies and workers, which was framed in a reassurance and success narrative. The other narrative employs a targeted beneficiary approach, emphasising the scale or amount of the aid provided.

The above analysis of the government narrative structures and frames of Anti-Crisis Shield communication reveals the existence of a carefully constructed narrative, the purpose of which is to consolidate power, manage public perception, and promote the PiS government as the only reliable force during the ongoing pandemic. The deployment of personal testimonies, protective metaphors and cause-and-effect narratives served to reinforce the government's image as a caregiver, benefactor and protector, while simultaneously marginalising the opposition and reducing democratic accountability. This analysis demonstrates how communication during a crisis can be instrumentalised for political gain, particularly in environments experiencing democratic backsliding.

6 CONCLUSION

The impact of Anti-Crisis Shields on democracy is contingent upon their design and implementation. When implemented with transparency, inclusivity, and respect for democratic norms, these measures can reinforce democratic governance and economic and social stability. However, if they result in the consolidation of power and a reduction in accountability, they can erode the very foundations of democracy. It is therefore imperative that governments strike a balance between the immediate requirements of crisis management and the long-term sustainability of democratic institutions. Narrative analysis used in this paper served as a tool for identifying and understanding few mechanisms of democratic backsliding. By examining how government framed its actions, particularly during pandemic, it helped expose hidden autocratic agendas, the manipulation of public opinion, and the erosion of democratic norms. In Poland, Anti-Crisis Shields were introduced by the government as a means of mitigating the economic impact of the SARS-CoV-2 pandemic and other crises on businesses and individuals. These measures, officially designated as the "Anti-Crisis Shields" encompassed a spectrum of financial assistance, including subsidies for businesses to retain employment, deferred tax payments, and other financial support mechanisms for a duration of approximately two years, inclusive of the electoral period. However, in the initial stages of the pandemic, the government was not averse to becoming embroiled in political manoeuvring, seeking to consolidate the authority of the incumbent president from the United Right. For a period spanning more than two years, the government engaged in active communication regarding its various financial programmes, utilising the extensive communication resources of actors subservient to the ruling party. This was to consolidate further the power of the PiS government, with an awareness of the impending general elections scheduled for 2023.

The anti-crisis measures implemented by the state in 2020-2021 were evaluated by the Supreme Audit Office in its report (NIK 2023) as being poorly designed and, furthermore, lacking in supervision. One of the shortcomings was the lack of alignment between the criteria for granting the aid and the intended objectives, namely the protection of jobs and the provision of liquidity to companies. The politicians responsible for overseeing the aid programmes did not evaluate the effectiveness or efficiency of the forms of support that were applied. Therefore, it seems reasonable to posit that other objectives may have been pursued, including the advancement of a political image-focused agenda. This was achieved, in part, through the frames and narrative structures described in this article. Furthermore, it can be surmised that this was part of the 'closure' of the PiS government rule (Makowski and Waszak 2020, 2) through the utilisation of frames related to welfare (the state as a caregiver), generosity (the state as a benefactor) and the capacity to effectively protect (the government as a protector), while simultaneously undermining the mechanisms of social and institutional control.

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APPENDIX

Inventory of Materials and Codes Used for Units of Analysis

1. YouTube videos (v1 – v17):

- v1) Ministry of Finance spot, #TarczaAntykryzysowa, https://www.youtube.com/watch?v=w_6SHLMudvA
- v2) statement by the Minister of Family, Labour and Social Policy Marlena Maciąg, #TarczaAntykryzysowa, <https://www.youtube.com/watch?v=Mjk8ISoH07Y>
- v3) statement by the Prime Minister Mateusz Morawiecki on the Anti-Crisis Shield <https://www.youtube.com/watch?v=Ig-qHG0r8g8>
- v4) Ministry of Finance spot, How the #AnticrisisShield helps entrepreneurs https://www.youtube.com/watch?v=di17da_NclA
- v5) PKO Bank Polski corporate spot, Anti-crisis Shield | We support Polish companies | <https://www.youtube.com/watch?v=4XJdvOxQDmc>
- v6) Ministry of Development and Technology spot, Anticrisis Shield <https://www.youtube.com/watch?v=Fife7juWOU0>
- v7) Ministry of Climate and Environment spot, The Polish Energy Shield - spot 30 sec. English subtitles, https://www.youtube.com/watch?v=6SAL4YvE_i8
- v8) playlist Governmental Energy Shield - information campaign https://www.youtube.com/playlist?list=PLrWAtxHx4r7o_FBE4Rh2hlmdSD46QYTV3
- v9) spot by the Prime Minister's Office, We introduce a shield allowance - we protect Polish families. #Anti-inflation Shield, https://www.youtube.com/watch?v=sCi75P_E3h4
- v10) spot by the Prime Minister's Office, We reduce taxes - we protect Polish families, #Anti-inflation Shield, https://www.youtube.com/watch?v=vUC42_Ajyz4
- v11) spot by the Prime Minister's Office, Fighting inflation together - Government's #Anti-Inflation Shield 2.0 will reduce prices of basic products <https://www.youtube.com/watch?v=iHwcZCjM54M>
- v12) Polish Development Fund corporate spot, Anti-crisis shield - timely help <https://www.youtube.com/watch?v=pMzRHhG56xY&t=1s>
- v13) Industrial Development Agency corporate spot, The Shield gave me a sense of security Dentica Stomatologia, <https://www.youtube.com/watch?v=WWr2QaqboVg>
- v14) BGK corporate spot, Crisis Shield, https://www.youtube.com/watch?v=2R_a8T4ZaBw
- v15) PGE CG corporate spot, Thanks to the government's Solidarity Shield you save 2k on your electricity bill!, <https://www.youtube.com/watch?v=jKS1HpzkBxA>
- v16) Law and Justice spot, #TheCrisis Shield. #PolskiŁad, <https://www.youtube.com/watch?v=KeKABY3Uq-w>
- v17) Industrial Development Agency corporate spot, Salon VR Łomża: "Gdyby nie było Tarczy Antykryzysowej, naszej działalności już by nie było", <https://www.youtube.com/watch?v=uPo3KtrIQKk>

2. Government websites (web1 – web4):

web1)	Government	Energy	Shield
	https://www.gov.pl/web/chronimyrodziny/rzadowa-tarcza-energetyczna		
web2)	Government	Anti-Inflation	Shield,
	https://www.gov.pl/web/chronimyrodziny/rzadowa-tarcza-antyinflacyjna		
web3)	Government	Solidarity	Shield,
	https://www.gov.pl/web/chronimyrodziny/rzadowa-tarcza-solidarnosciowa		
web4)	Government	Anti-Crisis Shield,	https://www.gov.pl/web/tarczaantykrzysowa



PROTIKRIZNI ŠČITI KOT SREDSTVO ZA UTRDITEV OBLASTI. PRIMER STRANKE ZAKON IN PRAVIČNOST NA POLJSKEM

Na Poljskem je pandemija sovpadla z že dlje časa obstoječo krizo pravne države ter jo še zaostrila. Članek raziskuje odziv poljske vlade na pandemijo COVID-19 z orodji javne politike, znanimi kot protikrizni ščiti (ACS). Ščite, ki so bili prvotno namenjeni ublažitvi negativnega gospodarskega vpliva pandemije, je uporabila tudi desničarska stranka Zakon in pravičnost (PiS) kot strateški instrument za utrjevanje politične moči. Z analizo vladne promocijske vsebine in izvajanja politike med pandemijo prispevek razkriva, kako je vlada izkoristila gospodarsko pomoč za okrepitev svoje volilne baze in avtoritete. Raziskava obravnava vprašanja o instrumentalizaciji javnih politik za politične koristi, manipulaciji kriznih narativov, turbulentni volilni kampanji in učinkih na procese demokratičnega nazadovanja na Poljskem. Navsezadnje članek razpravlja tudi o tem, kako lahko krizno upravljanje, kadar je politično usmerjeno, spodkopava demokratične norme in odgovornost.

Ključne besede: protikrizni ščit; utrjevanje oblasti; demokratično nazadovanje; stranka Zakon in pravičnost.



COVID-19: CRISIS, ACCOUNTABILITY AND SUPPORT FOR POPULIST-AUTHORITARIAN GOVERNMENTS IN POLAND AND HUNGARY

Robert SATA and Marta ŻERKOWSKA-BALAS¹

We examine how pandemic crisis management has affected public support in the democratic backsliding members of the EU – Poland and Hungary. We claim the first, immediate effect of the pandemic is to “rally around flag” but since populist illiberal governments adopt authoritarian measures, the ongoing pandemic brings to the fore populists’ failure/ineffective crisis management, and thus public dissatisfaction should erode support for the incumbents. Relying on original survey data collected during the Covid-19 pandemic, we test several possible sources of dissatisfaction: the state of the healthcare; the economy; corruption and abuse of power; and distorted communication/false information on the crisis. Citizens dissatisfied with governing populist parties’ performance should be willing to punish the “guilty” party withdrawing their support, yet we find partisan preferences affect government accountability evaluations and leave supporters immune to policy negative effects. Comparing Hungary to Poland, we see the more polarized society is, the more likely extraordinary circumstances will only reinforce divisions in society and strengthen incumbents.

Key words: Covid-19; accountability; partisanship; public support; democratic backsliding.

1 INTRODUCTION

The Covid-19 pandemic has proven a challenge for the very foundations of modern life. Following the appearance of the Coronavirus, quickly introduced strict lockdown rules paused all human interaction, having wide-ranging effects not only for individual lives but entire societies, national and international economic systems, as well as political regimes. The protracted nature of the

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pandemic and its many waves only deepened these challenges, the cyclical easing-and-harshening restriction measures only putting further strain on people everywhere. In these extraordinary circumstances, managing the pandemic has become the centre focus of everyday life and our paper investigates how government response to the pandemic affects public support for incumbent political actors.

We look at Poland and Hungary as two closely similar cases to investigate how pandemic management affects public support for governing parties in an illiberal setting. We believe it is important to analyse how the pandemic is managed in the context of democratic backsliding – as the crisis leads to further curtailment of rights and dissatisfaction with authoritarian governments may be relevant for their electoral future (and democracy in general). More specifically, we concentrate on how the Covid-19 crisis could revitalize democratic accountability of governments, claiming performance under the pandemic triggers the punishment-reward mechanisms of political accountability. We think this should be the case specifically for Central and Eastern European countries within the European community, as these seem to have been particularly hard hit by Covid-19 – despite being largely unaffected by the first wave, the second, third and following waves have taken a high toll.

To verify to what extent government performance under the pandemic influences support for incumbent populist-authoritarian parties, we evaluate survey data collected during the third wave of the Covid-19 pandemic for both countries, in February-July 2021. We demonstrate that a sense of personal economic security and positive evaluation of government economic measures are the strongest predictors of vote choice under the pandemic, confirming the punishment-reward mechanism of political accountability. Furthermore, our analyses confirm the positive relationship between positive assessment of authorities' crisis response and support for the government party in general. We also find important differences: while Poles do not forgive politicians drawing material gains from the pandemic, neither Poles nor Hungarians are prone to punish the incumbent parties for abuse of power in these extraordinary circumstances. Our most important finding is that positive evaluation of pandemic management is strongly dependent on partisan preferences. Strong party attachment (that is also reinforced by one-sided media communication) makes government supporters almost immune to negative effects of government decisions made during the pandemic. This is especially true in case of Hungary, where Fidesz voters have a strong bias in their assessment and uncritically support the party's governing acts. This way the punishment-reward mechanism is in fact disabled and acts rather as 'accelerator' or 'accentuator' of partisanship, at least for Hungary. This suggests that if political polarization is extreme, even an extraordinary crisis such as the Covid-19 pandemic will be assessed along party lines, and only if society is less divided along party lines, governing parties are more likely to be held accountable for their policies.

2 ACCOUNTABILITY IN TIMES OF CRISIS

The mechanism of accountability, defined as "a relationship between an actor and a forum, in which the actor has an obligation to explain and justify his or her conduct, the forum can pose questions and pass judgement, and the actor may face consequences" (Bovens 2010), is one of the key pillars of democracy. The importance of holding political actors accountable for their actions is crucial for

all representative democracies (O'Donnell, Cullell and Iazzetta 2016; Diamond and Morlino 2005; Roberts 2009; Bühlmann et al. 2012), but the issue seems to be of particular importance in countries such as Poland and Hungary that advanced furthest on the path of democratic backsliding (Bustikova and Guasti 2017; Sata and Karolewski 2020). While some might claim that the virtue of being accountable ceased to be a desirable state of affairs (M. D. Dowdle 2006), we believe the fundamental role of democracy is to ensure people's evaluation of the performance of politicians and political institutions can be enacted (at least) via elections. We do not contest that many actors entertain very different experiences and visions of public accountability in current governance systems (M. W. Dowdle 2017), yet this does not mean governments shall not be held accountable for policies they adopt.

In times of crisis, the balance between accountability, transparency and integrity can be disrupted. Crisis requires urgent actions by governments, which are often not subject to usual control. At the same time, studies of the support for political leaders during international crises and wars (Dinesen and Jæger 2013; Mueller 1973; Schubert, Stewart and Curran 2002), terrorist attacks (Chowanietz 2011; Dinesen and Jæger 2013; Woods 2011; Chanley 2002; Lai and Reiter 2005), natural disasters (Bechtel and Hainmueller 2011) and most recently Covid 19 pandemic (Blais, Chen and Pruyers 2021; Bol et al. 2021; Baekgaard et al. 2020; De Vries et al. 2021; Esaiasson et al. 2021; Hegewald and Schraff 2024; Yam et al. 2020; Schraff 2021; Turska-Kawa, Csanyi and Kucharčík 2022) prove existential threats tend to make voters more trustful towards the authorities. This phenomenon is known as the "rallying around the flag" effect and describes situations in which public opinion becomes more favourable towards political leaders or institutions during times of crisis or external threats (Johansson, Hopmann and Shehata 2021, 321).

The rallying around the flag effect can be triggered by several factors, such as the desire for stability and security in times of uncertainty and fear (Baekgaard et al. 2020). The public may look to political leaders for guidance and reassurance, leading to increased support for those in power (Falkheimer et al. 2022). Additionally, the perception that leaders are taking decisive action and demonstrate strong leadership in response to the crisis can contribute to the rallying effect (Hintson and Vaishnav 2023). The public may rally behind leaders who are seen as capable of effectively managing the crisis and protecting the nation's interests (Nooruddin 2010). The rallying around the flag effect can also be influenced by factors such as nationalism and patriotism. In times of crisis, there is often a heightened sense of national identity and solidarity, which can lead to increased support for leaders, who are perceived as defending the nation's interests (Hintson and Vaishnav 2023; Malešič 2021).

One of the important characteristics of the rallying around the flag effect is its temporality. The boost in popularity of the authorities is rather short-term, there is little or no chance this phenomenon gets transformed into long-term support (Kernell 1978; Mueller 1973; Woods 2011; Hetherington and Nelson 2003). The research shows that once the intensity of crisis subsides, approval reverts to the levels it was at before the crisis began. Simultaneously, the usual mechanisms shaping support for the government come back into play. First, the crisis gets politicized: its perception becomes affected by how media and opposition politicians highlight ineffective crisis management (Baker and Oneal 2001; Boin, Stern and Sundelius 2016; Hetherington and Nelson 2003; Johansson, Hopmann and Shehata 2021). Second, as the salience of the crisis declines, political ideology

regains its significant role (Dalton 2021; Schmitt 1983; Johansson, Hopmann and Shehata 2021). As Johansson and colleagues (2021, 324) describe, the public reverts to judging political actors along the partisan lines of political ideology, and perceptions of how society is affected by the crisis lose in explanatory power.

We believe the same logic applies to the Covid-19 pandemic management in Poland and Hungary, therefore we argue: (1) the immediate effect of the pandemic is to rally around flag and in response, (2) populist illiberal governments adopt authoritarian measures under the pretext of crisis management, yet (3) the ongoing pandemic can bring to the fore populists' failure/ineffective crisis management and thus (4) erode public support for incumbents. Based on political accountability literature, we expect to find eroding government support as citizens become dissatisfied with the governing party's performance in the pandemic and are willing to punish the "guilty" party with support withdrawal (Key 1966; Fiorina 1981; Achen and Bartels 2016). Furthermore, we believe that in times of the world pandemic, the debate about government performance seems to go beyond partisan ideological preferences and traditional issues (economy, welfare, cultural issues) and instead focuses primarily on pandemic related problems and government response to these. Analysing the two 'illiberal democracies', characterized by highly crystalized polarized politics and deeply divided society (Sata and Karolewski 2020), enables us to examine how polarization and partisanship play a role in assessing incumbent political parties' often undemocratic policies during pandemic management.

3 PANDEMIC ACCOUNTABILITY IN HUNGARY AND POLAND

Holding Hungarian and Polish governmental parties electorally accountable is especially important since decisions made by Orbán's and Kaczyński's governments have led to the politicization of key institutions, which together with puppet presidents of various public bodies have impaired the functioning of horizontal accountability. There are no "state agencies that are legally enabled and empowered, and factually willing and able, to take action that span from routine oversight to criminal sanctions or impeachment in relation to actions or omissions by other agents or agencies of the state that may be qualified as unlawful" (O'Donnell 1999, 38). As many examples prove, the party-captured Polish and Hungarian state institutions are unable to prevent or punish unlawful actions by government actors.

In such settings, the ability to perform vertical accountability, actions that citizens can perform to limit the unwanted actions of elected representatives (O'Donnell 1999), is even more important, even if it is to a large extent restricted by the illiberal regimes. Both countries attempt to disable societal control and have installed obstacles to social mobilization, expanded control on media and even the possibility to punish authorities at the ballot box has been limited through institutional obstacles that were put in face of opposition forces (fait accompli in Hungary (Várnagy and Ilonszki 2018), present to some extent in Poland during the 2020 presidential elections (Flis and Ciszewski 2020)). Notwithstanding these undemocratic developments and the already in-built advantages for incumbent parties for both Hungary and Poland that question how fair or free elections are, we believe governing parties can (still) be held accountable by electorates in both countries (opposition parties can run for and eventually win elections, see the 2023 Polish elections).

The impairment of political accountability in both Hungary and Poland has been only reinforced by the sudden outbreak of the pandemic. The quickly introduced pandemic measures largely limited one's freedoms yet were readily accepted amidst fears of the spread of the Coronavirus. This initial rallying around the flag effect enhanced the power of governing parties in most countries, enabling adoption of further authoritarian measures (Guasti 2020; Levine 2020; Changotra et al. 2020; Weiffen 2020; Kukovič 2022). In Poland, government adopted a new law on specific solutions related to the preventing, counteracting and combating of COVID-19, which provided more power to the executive at the expense of checks and balances, while in Hungary the government opted for rule by decree and a prolonged emergency state, disabling any opposition oversight or institutional control of policies adopted.

Comparing Poland and Hungary makes sense as the two have had a very similar track record with Covid-19 and the government response – ranging from lockdown policies to economic or health policies – has been also very similar throughout the crisis (Ritchie et al. 2020). While both countries have been affected little by the first wave of the pandemic, both suffered seriously in the second, third and following waves compared to other European countries. Our data has been collected during these most difficult times, when pandemic management and governmental decisions related to it should establish the primary basis for electoral accountability of incumbent governments. As a result, we expect to find increasing erosion of government support as citizens dissatisfied with the governing party's performance should be willing to punish the "guilty" party with withdrawal of their support (Key 1966; Fiorina 1981; Achen and Bartels 2016).

There are several premises that support our claim. First, the pandemic has serious economic consequences for national economies as well as for individual households. Studies reveal the pandemic's impact on increasing social inequalities (worsening the situation of the young, women, less educated people (Ali and Ali 2020) and increasing economic inequalities (Favero, Ichino and Rustichini 2020). This makes it plausible that basic economic voting theory could explain vote choice in the context of the pandemic, i.e. the more dissatisfied with government economic relief efforts people are, the less likely they are to support incumbents.

Second, the pandemic had negative political consequences for democracy, especially for some countries (Guasti 2020). Hungary and Poland are clear examples of such countries, both being poster children of democratic backsliding, already way before the Covid-19 pandemic, only using the health crisis to further cement illiberal rule. Yet, despite the authorities' excuse of fighting the pandemic, undemocratic decisions have not gone unnoticed. Recurring protests that were organized despite lockdown conditions are the best evidence of civil society discontent with government action. We do expect that people who think governments abuse their power under the pretext of the pandemic will also be likely to withdraw their electoral support of incumbents.

Third, the different decisions governments have made to slow down the spread of the Coronavirus often caused controversies not only among political actors or experts – doctors, epidemiologists, as well as constitutionalists – but citizens as well. Many people object to pandemic measures claiming they limit personal, economic, and political freedoms and privacy. Given the extraordinary nature of

the pandemic crisis, we expect these controversies should lead to the intensification of the punishment-reward mechanism of government accountability with regards to specific pandemic response, as the management of the health crisis becomes the most important issue of the day. As such, Hungarian and Polish voters might be more inclined to withdraw their electoral support from the incumbent parties than before the pandemic, given their failure/ineffective crisis management. This way the pandemic (more specifically dissatisfaction with its mismanagement) could erode the support of populist authoritarian parties in both Poland and Hungary thus increasing the chances of moving them (back) onto a more democratic track.

4 HYPOTHESES

Based on the above-described premises, we believe that Polish and Hungarian government's evaluation at the beginning of pandemic benefited from the rallying around the flag effect, but as the pandemic continued, it became politicized (used in political games by parties and media) and ideologized (the political actors became judged along partisan lines) (Johansson, Hopmann and Shehata 2021). We propose a range of hypotheses focusing on the determinants of electoral accountability in times of Covid-19 crisis, noting a number of possible sources of dissatisfaction under the pandemic: economy (Lewis-Beck and Stegmaier 2000; Brug, Eijk and Franklin 2007; Duch and Stevenson 2008; Palmer and Whitten 2011); healthcare (Kavanagh and Singh 2020); abuse of power by authorities (radical legal steps as well as corruption, see Guasti 2020); and distorted/one-sided communication/false information (Hart, Chinn and Soroka 2020; Pennycook et al. 2020). We hypothesize that negative evaluation of government actions related to pandemic and its immediate consequences (general government pandemic performance, economic support for entrepreneurs and the state of healthcare) will reduce support for Fidesz and PIS.

We formulate the following hypotheses to test these claims:

- *H1a: The more negative the evaluation of the government reaction to the pandemic, the higher the propensity to punish the governing party at the ballot.*
- *H1b: The worse the evaluation of the governmental support to protect the economy, the higher the propensity to punish the governing party at the ballot.*
- *H1c: The worse the evaluation of the state of healthcare, the higher the propensity to punish the governing party at the ballot.*

Similarly, the conviction that government is using the pretext of fighting the pandemic to abuse its power and/or gets financial benefits makes people less prone to endorse the governing party. Therefore, we expect:

- *H2a: the stronger the conviction that the government has used the epidemic situation to further strengthen its power by declaring an emergency to carry out its previous policy plans and*
- *H2b: the stronger the conviction that the government and those associated with it engaged in completely opaque activities and made a lot of money during the crisis, the higher the propensity to punish the governing party at the ballot.*

Following the punishment-reward mechanism, we assume that people not only assess government responsibilities on the national level, but they also look at how authorities' decision affect their own situation (Achen and Bartels 2017). Therefore, we assume that deterioration of one's own economic situation will also affect the propensity to support the government. We expect:

- *H3a: voters, who already lost their job because of the pandemic or are very likely to lose it and*
- *H3b: voters, who suffered financial loss because of the pandemic to be more prone to punish the governing party at the ballot box.*

Finally, let us note that the functioning of the punishment-reward mechanism is context-dependent. First, we expect the sense of security to play an important role.

- *H4: People, who perceive Covid-19 as a significant threat, will rally around flag, and thus be less willing to punish the government for its failures.*

We test this assumption with respect to different aspects such as the state of national economy, the health of Hungarians/Poles, their everyday lives, personal financial situation, inflation and price rises, and lasting shortages of goods. The politicization of the crisis presumes that opposition and news media will play important roles in the process (Johansson, Hopmann and Shehata 2021; Baker and Oneal 2001; Boin, Stern and Sundelius 2016; Hetherington and Nelson 2003). Media coverage critical of the government's management of the crisis should enhance people's awareness of incumbent failures and augment propensity to punish the government parties. This effect is diminished by one-sided media consumption, which is the case of the significant part of Hungarian and Polish society. We assume therefore that:

- *H5: Exposure to government favouring media will reinforce the positive evaluation of Fidesz/PIS pandemic performance.*

5 METHODOLOGY

To verify our hypotheses, we use data for both countries collected in online surveys during the third wave of the pandemic. The surveys were carried out on quota samples, with quotas for gender, age, level of education and place of residence. Quotas were specified according to national census data (Polish and Hungarian Central Statistical Office) to ensure a nationally representative sample. To reduce the sampling error and potential non-response bias all data has been weighted with post-stratification weights. Data has been collected in two series: February and July 2021 for Poland and March and May 2021 for Hungary. The closeness of timing for the surveys in both countries allows us to make comparisons as both countries faced very similar conditions throughout the pandemic. The Polish sample is 702 people for the first survey and 1,202 people for the second; the Hungarian sample has 2,000 respondents for each series of the survey. Although the sample of the first series for Poland is relatively small, it does not impede the quality of the results of our analyses.²

As we focus on vertical accountability, our dependent variable is the declared vote for the governing parties, Fidesz or PIS (vs. vote for other parties), if the election was held next Sunday. Due to the specificity of online survey research, the results for party preferences are slightly biased (despite the weighting procedure, the support for governing party in both countries is lower than opinion polls suggest – see Appendix). Notwithstanding this bias, the sample is

² The models are tested with either both series combined or with the second series of the survey only. The single model using each series of the survey separately (which serves information purpose) does not show essential differences between the series as far as the influence of variables is concerned.

fit for analysis as we concentrate on deciphering the voting intentions of incumbent supporters vs. opposition voters.

We use different statistical models to examine what explains the changes in the support for the incumbent parties in times of the Covid-19 pandemic. In our basic model, we verify the functioning of the punishment-reward mechanism. Our key explanatory variables are the positive evaluation of government response to the pandemic and positive assessment of governmental economic relief solutions (see Appendix for details of variables coding and distribution). Since individual perception of the Coronavirus and its possible effects can affect the assessment of the ruling party actions, we include in the model the pandemic threat index (measuring the perception of Covid-19 as a threat for personal and national issues), financial loss index (capturing the influence of pandemic on personal financial situation) and the sense of threat of losing one's job because of pandemic. We first conduct our analyses using all four series of data (series 1 and 2 of the survey combined for each country). To check the temporal effect of the punishment-reward mechanism, we control for the series.

In the second model, we add three political variables as possible sources of dissatisfaction with incumbents: the perceived status of the healthcare system, the conviction that the government has used the pandemic as a pretext to further strengthen its power and the belief that the government and those associated with it engaged in opaque activities to make money from the crisis. These variables were available only in the data from the second survey series for both Hungary and Poland. We test these variables as proxies of further democratic backsliding. We include additionally a country variable to capture possible differences between Hungary and Poland. Next, to check for the country differences (statistically significant in the previous model), we verify the complemented model, which includes the interaction between each variable of interest and the country variable.

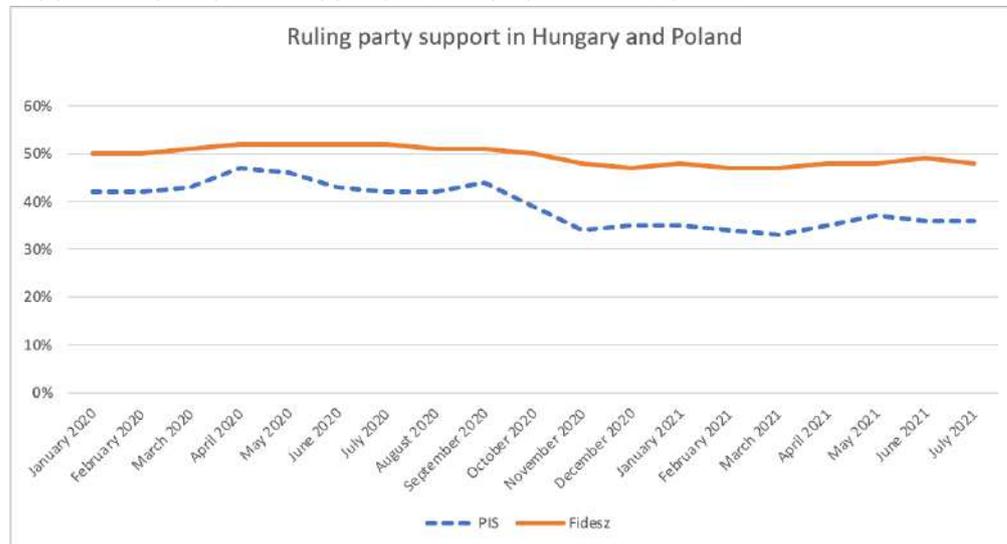
Finally, by adding dummy variables for the main source of information on the Coronavirus, we examine the role of media consumption in the political accountability process. We check to what extent the consumption of television, radio, newspapers, internet portals and social media affects the propensity to vote for the governing party. When possible, we also check how government-media consumption might affect voting intentions. All models include a range of control variables: gender, age, level of education (lower, medium, higher), job status (employed vs others), to ensure that our results are generalizable.

6 RALLYING AROUND THE FLAG?

A very quick look at the voting intention data for both Hungary and Poland (Figure 1) gives us mixed results on our expectations that (1) the first, immediate effect of the pandemic is to rally around flag but since (2) populist illiberal governments tend to adopt authoritarian measures, (3) the ongoing pandemic can bring to the fore populists' failure/ineffective crisis management and thus (4) dissatisfaction erodes public support for the incumbents. More precisely, while for Poland we can see an initial surge in popularity from the start of the crisis in March 2020 and then a drop already in May 2020, with another continuous decrease from September to December 2020, PiS losing 10% in support rates, for Hungary the trends are barely noticeable. More precisely, we see that the continuous drop in Fidesz's popularity since October 2019 stopped in March

2020 – the start of the pandemic, yet the initial rally around the flag effect is minimal: an increase in support from 51% to 53% by April 2020. This level then oscillates during the summer, and we see a drop from October 2020 until January 2021, but once again the decrease is 5-6%, close to the margin of error.

FIGURE 1: RULING PARTY SUPPORT IN HUNGARY AND POLAND



Source: Politico (see <https://www.politico.eu/europe-poll-of-polls>).

As such, while Poland clearly illustrates our claim that the pandemic has affected incumbent parties’ support by an increase via the rally the flag effect first, followed by a substantial drop as the pandemic rages on, in Hungary, while the direction of change in incumbent support is in the direction that we expect, the effects seem to be very minor. The very high support rate for Fidesz (above 50% of voters) coupled with the high polarization of society could potentially explain why only this marginal effect on incumbent support (see discussion later). Yet, since the direction of these changes is in line with our expectation, and the more substantial decreases in Fidesz support happen exactly at the second wave of the pandemic in the country, these mixed results do not exclude but rather point towards the functioning of the punishment-reward mechanism during the protracted crisis.

7 ASSESSING GOVERNMENT PANDEMIC MANAGEMENT

Since the rally of the flag effect does not explain incumbent support in a prolonged crisis, we examine whether the punishment-reward mechanism explains better the support base for government parties during the ongoing Covid-19 pandemic. Given the importance of the health crisis, we analyze first the influence of Covid-19 related attitudes and beliefs among voters on support for the governing party in Hungary and Poland (Table 1).

As Table 1. shows, three variables are statistically significant in both countries: positive evaluation of the government reaction to Covid-19 and positive assessment of the governmental support for entrepreneurs increase propensity to vote for incumbent Fidesz or PiS, while the perception of the Coronavirus as a threat for various aspects of personal and national life decreases support for the governing party in both countries. This confirms that the pandemic has an important effect on the support of governing parties.

TABLE 1: MODELS FOR COVID-19 AND INCUMBENT SUPPORT IN HU AND POL

	HUNGARY			POLAND		
	B	S.E.	Exp(B)	B	S.E.	Exp(B)
Government reaction to Covid	3,43***	0,19	30,79	1,48***	0,15	4,39
Job loss threat	0,29	0,43	1,34	-0,28	0,24	0,76
Pandemic threat index	-0,18***	0,05	0,84	-0,10**	0,04	0,91
Pandemic financial loss index	-0,34***	0,07	0,71	0,07	0,04	1,07
Support for entrepreneurs	2,67***	0,22	14,46	1,85***	0,17	6,35
Gender	-0,43**	0,18	0,65	0,31**	0,15	1,36
Age	0,00	0,01	1,00	0,02***	0,01	1,02
Education	-0,49***	0,11	0,61	-0,24*	0,12	0,79
Job status	0,45**	0,19	1,57	0,37**	0,17	1,45
Wave 1	0,05	0,18	1,06	0,02	0,15	1,02
Constant	-2,13***	0,52	0,12	-2,97	0,40	0,05
-2 Log likelihood	1067,489a			1299,618a		
Chi-square	1841,28			442,04		
df	10,00			10,00		
Sig.	0,00			0,00		
Cox & Snell R Square	0,42			0,23		
Nagelkerke R Square	0,73			0,36		

Source: Own calculations, waves 1 and 2 combined for each country.

More precisely, the fact that the perception of the pandemic as a major threat decreases support for incumbents' points towards the importance of government action in times of crisis since one could argue that proper government action should translate in lowering the perception of threat among the population (because of that action). Results show, Hungarians' vote choice is also influenced by the personal financial loss caused by the pandemic, which only strengthens our argument that in extraordinary circumstances of crises, personal issues (due to the crisis) will outweigh ideology or other issues and matter most for political support. In other words, when a crisis affects the individual negatively, support for the governing party that oversees managing the crisis will decrease.

Yet, looking closer at the data, the distribution of the responses (Appendix) makes us suspect that the responses in Hungary were primarily driven by party loyalty, i.e. only supporters of opposition parties declare they have suffered financially from the crisis – while no such distortion is present in the Polish sample. For Hungary, the same partisanship dependency is true for the rest of variables, only perception of Covid-19 as a threat is slightly less dependent on what party you support. This is a surprising result as the economic and societal effects of the pandemic were very similar across the globe and for the two countries, they were almost identical. Despite this, for Hungary, Fidesz supporters do not seem to be affected by the major disruption of the economy and its consequences for social life. This way, our data reveals that extreme polarization of society can affect every aspect of social life – even the assessment of an extraordinary health crisis and its effects seems to be done not along objective or scientific arguments but along party preferences.

It must be noted there is no statistically significant difference between the survey series in either of countries, but as Table 2 shows, the significance of the perception of Covid-19 as a threat differs in subsequent datasets (for Poland the significance of this variable in the joint dataset may result from the increased sample, as the p value strongly depends on the number of cases). Given the protracted nature of the Covid-19 pandemic, we argue the data reflect well societal attitudes: as people have more-or-less gotten used to the different restrictions and the gradual easing of these restrictions at the time of data collection, threat perceptions ameliorated consequently (see Figure 2). This is true for both countries, although there is more societal unease in Hungary than

we see in Poland, which again might be due to the local dynamics of the pandemic, Poland faring slightly better than Hungary in the later waves of the crisis (Ritchie et al. 2020). More importantly, we cannot speak of the rally the flag effect any longer for our second survey wave, but it is rather the punishment-reward mechanism of accountability that explains electoral support.

TABLE 2: SIGNIFICANT COVID-19 VARIABLES FOR INCUMBENT SUPPORT FOR EACH SURVEY

	HU 1	HU 2	PL 1	PL2
Government reaction to Covid	***	***	***	***
Job loss threat				
Pandemic threat index	***			
Pandemic financial loss index	***	***		
Support for entrepreneurs	***	***	***	***
Gender	***			*
Age			**	
Education	***	**		
Job status	**	**		
Constant	***	***	***	***

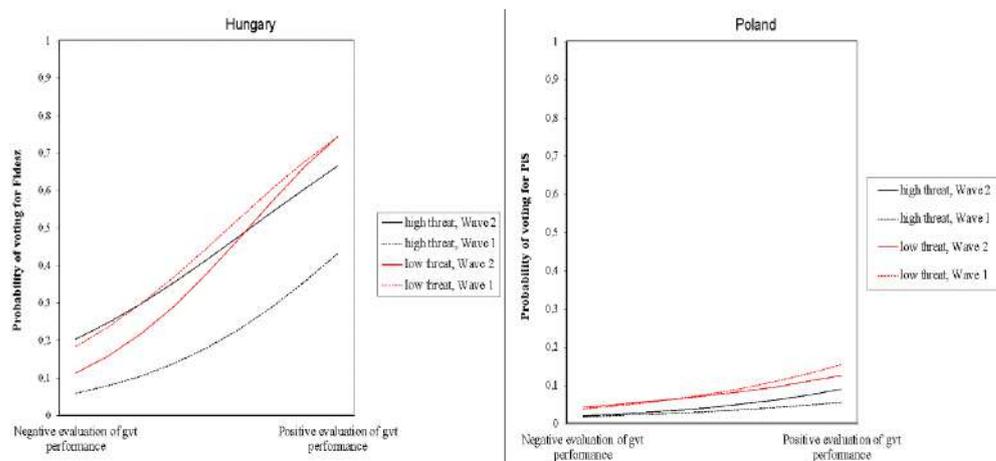
Source: Own calculations, series 1 and 2 separately for each country.

The significance level of our control variables (age, gender, education, job status) as well as the direction of the effects (like the more educated, the more critical towards government you are) also seem to strengthen this conclusion as these are nothing but the traditional covariates of assessing governing parties' performance, well established in the party literature. At the same time, we should note that the significance levels of the different variables decrease for the later waves of data, which once again only underlines that as the third wave of the pandemic eases, the Covid-19 crisis is slowly normalized and becomes part of everyday life and issues related to the pandemic matter less and less for voters.

Looking at the two countries comparatively, what is worth emphasizing is the fact that the model fits very well the Hungarian data, while it does less so for Poland. The very high values of r-squared of the model, together with the previous findings emphasizing the influence of party loyalty on the distribution of variables lead us to conclude that in the case of Hungary, we face a very strong partisan bias that handicaps the perception of government crisis measures. This directly affects the assessment of government response to the pandemic – although we expect that the unprecedented health crisis brings critical responses that cut across partisanship this seems to happen only in Poland, while in Hungary even the Covid-19 crisis, as extraordinary as it is, is assessed through the lenses of partisanship: supporters of government parties evaluate positively government response, while opposition voters evaluate every aspect of the crisis and its management negatively.

To learn more about the possible factors behind public evaluation of government response to the Covid-19 crisis, in the second step of our analysis we add political variables related to government malpractices and the evaluation of the current state of the healthcare system as possible explanatory factors of how voters evaluate governmental management of the health crisis (Table 3).

FIGURE 2: RALLY AROUND THE FLAG? COVID-19 THREAT PERCEPTIONS AND GOVERNMENT EVALUATION IN HUNGARY AND POLAND



Source: Own calculations, series 1 and 2 combined for each country.

The complemented model includes evaluation of the status of the healthcare system, conviction that the government has used the epidemic as a pretext to further strengthen its power and that the government and those associated with it engaged in corrupt activities during the crisis. We expect that since the Covid-19 crisis directs attention to healthcare services, people should penalize governing parties if they cannot access health services in the quality they expect. Similarly, the crisis (in its later waves) also brings to the fore government response action, and we expect if these actions are considered inappropriate by voters, this will negatively affect vote choice for incumbent parties, as predicted by political accountability.

TABLE 3: COVID-19, POLITICAL ABUSE AND INCUMBENT SUPPORT

	B	S.E.	Exp(B)
Government reaction to Covid	1,97***	0,15	7,20
Support for entrepreneurs	2,00***	0,17	7,35
State of healthcare	0,06	0,18	1,06
Abuse of power due to Covid	-0,50	0,26	0,61
Gvt financial benefits due to Covid	-1,59***	0,27	0,20
Job loss threat	0,11	0,26	1,12
Pandemic financial loss index	-0,05	0,05	0,95
Pandemic threat index	0,11**	0,04	1,12
Gender	0,29*	0,13	1,33
Age	0,00	0,00	1,00
Education	-0,11	0,09	0,89
Job status	0,46***	0,14	1,58
HU	0,78***	0,17	2,18
Constant	-2,68***	0,35	0,07
-2 Log likelihood	1660,109a		
Chi-square	1487,423		
df	13		
Sig.	0		
Cox & Snell R Square	0,43		
Nagelkerke R Square	0,62		

Source: Own calculations, wave 2 combined for Hungary and Poland.

As Table 3 shows, contrary to what we expect, the negative evaluation of the state of national healthcare systems is not a significant predictor of vote choice for incumbents. The possible explanation for this result is that the general poor condition of healthcare, which has been a characteristic for the entire region ever since regime change (Sitek 2008; Pažitný et al. 2021), seems to be attributed not (only) to present governments but is rather considered an effect of the activity (or negligence) of their predecessors. In a sense, voters take it for granted that

the healthcare system is underfinanced and unable to cope with the pandemic as it has been neglected by all post-communist governments. In turn, this 'shared' responsibility for poor healthcare might then explain why there is no immediate punishment mechanism present in voting intentions, although CEE countries pay a high death-toll to Covid-19 due to deficiencies of their healthcare systems.

Our analysis yields similar results that contradict our expectations regarding the effect of government malpractices on incumbent support. Most significantly, the belief that the government has used the Covid-19 crisis as a pretext to further strengthen its power by declaring emergency rule to carry out its previous policy plans is statistically insignificant. While both governments have been accused of using emergency rule to sidestep the opposition or democratic controls to pursue their political goals (Guasti 2020), people seem unaffected by these allegations, when making their vote choice. The only variable included in the model that significantly reduces chances to support incumbent parties is the conviction that the government and those associated with it engaged in opaque activities to make money from the crisis. This suggests that both Hungarian and Polish societies display a low trust of politics in general and voters accept abuse of power against political opponents or democratic norms to a larger extent than corrupt activities that bring financial benefit for incumbents and their associates.

At the same time, the inclusion of political variables in the model predicting incumbent support changes the vector of the Covid-19-threat variable index in Hungary: as we noted (see Figure 2 and 3) those, who perceive Covid-19 a threat, are more prone to support the government. We explain this with the rally around the flag effect – the more threat you see, the more you rally the flag. The influence of the other two Covid-19 related variables: evaluation of government response and assessment of governmental support for entrepreneurs work as expected, suggesting that the punishment-reward mechanism can operate simultaneously with the rally around the flag effect: for those most fearing the health crisis, it is less about actual performance of governments or direct economic assistance provided during the crisis but for the less fearful and more instrumental voter, these will be factors driving incumbent support.

Nevertheless, there are significant differences between Hungary and Poland as the country variable is statistically significant in our analysis, therefore we add interactions to our models in the next step of analysis to check the performance of key variables in the two cases separately (Table 4).

The findings once again confirm that abuse of political power using the pretext of the pandemic is not significant for predicting vote choice in any of the two countries. These findings suggest that people seem to take for granted that the pandemic might call for concentration of political power to respond effectively to the crisis or voters are less concerned with democratic values in a major crisis. The analysis of interactions further confirms that perception of the state of the healthcare system is not a significant predictor of vote choice, which we explain again with a general and longer-term underdevelopment of the sector in the region. Yet, to our surprise, the most important finding in the country comparison is that enrichment of government actors and their allies significantly diminishes support for PiS in Poland but does not have a similar effect in Hungary for Fidesz.

TABLE 4: COVID-19, GOVERNMENT POLICIES AND INCUMBENT SUPPORT – HUNGARY VS. POLAND

	B	S.E.	Exp(B)
Government reaction to Covid	1,12***	0,20	3,06
Government reaction *HU	1,52***	0,30	4,58
Job loss threat	-0,16	0,30	0,85
Job loss threat*HU	1,05	0,56	2,85
Pandemic threat index	-0,03	0,06	0,97
Pandemic threat index *HU	0,32***	0,08	1,38
Pandemic financial loss index	0,08	0,05	1,09
Pandemic financial loss index*HU	-0,46***	0,10	0,63
Support for entrepreneurs	1,58***	0,22	4,85
Support for entrepreneurs*HU	0,84*	0,40	2,32
Healthcare	0,12	0,20	1,13
Healthcare*HU	-0,17	0,39	0,85
Financial benefits due to Covid	-1,66***	0,34	0,19
Financial benefits*HU	0,18	0,55	1,20
Abuse of power due to Covid	-0,10	0,33	0,90
Abuse of power*HU	-0,85	0,53	0,43
Gender	0,26*	0,13	1,30
Age	0,01	0,00	1,01
Education	-0,16	0,10	0,86
Job status	0,47***	0,15	1,59
HU	-0,05	0,27	0,95
Constant	-2,19***	0,40	0,11
-2 Log likelihood	1574,276a		
Chi-square	1573,255		
df	21		
Sig.	0		
Cox & Snell R Square	0,44		
Nagelkerke R Square	0,64		

Source: Own calculations, series 2 combined for Hungary and Poland.

This finding contradicts our expectations especially since independent Hungarian media reports noted several shady businesses in relation to buying medical equipment, vaccines or developing contact tracing software or Covid-19 vaccination cards that all benefitted government cronies (Transparency International 2023). Notwithstanding these reports, we find governmental corruption does not affect voting preferences in Hungary. It would be cynical to argue corruption is widely expected and accepted by Hungarian voters (although clientelism is a widely accepted phenomena for CEE countries (Innes 2014; Hale 2017; Magyar 2016), instead we think a possible explanation is that questionable government action is evaluated through partisanship and therefore the significance of the issue is cancelled out: on the one hand, Fidesz supporters disregard any criticism of the government they might hear of, while opposition voters only strengthen in their anti-Fidesz choice upon learning such news.

The interactive model also confirms already observed patterns related to our other variables: positive evaluation of government reaction to the pandemic and financial support offered for entrepreneurs significantly influence support for the governing party (strength of the former is greater in Hungary, strength of the latter greater in Poland). At the same time, the other two variables on threat and economic loss due to Covid-19 perform as expected only in Hungary: perception of Covid-19 as a threat increases and financial loss caused by the pandemic decreases support for Fidesz. This means that by the second round of our survey (towards the end of the third wave of the pandemic in both countries), both threat perceptions and financial relief efforts proved insignificant in explaining vote choice in Poland, which again suggests a 'normalization' of the Covid-19 crisis into everyday life somewhat faster than in Hungary, which in turn might be due to the heavier toll of the pandemic in Hungary at the time (Ritchie et al. 2020).

In addition, Hungary has also suffered a decline in GDP, while Poland has managed to retain the same level of GDP during the crisis (Aidukaite et al. 2021).

Given the differences between the two countries in how government evaluations might explain vote choice for the incumbent parties, we move forward and verify the influence of media consumption. We expect that pro-government media consumers evaluate government response to the crisis more positively and thus are more inclined to vote for incumbents. Similarly, we expect that reliance on social media vs. more traditional media outlets increases vote for incumbent parties since unfavourable information is often screened out by algorithms of user preferences of social media. Unfortunately, differences in questionnaire design allow us to make significantly more meaningful analysis for Poland as the Hungarian survey had less focused questions on media consumption habits and we are unable to distinguish between pro-government media variables for Hungary. Moreover, for Hungary, none of the media indicated as the main source of information significantly influences the support for Fidesz. In Poland, consumption of pro-governmental public television (TVP) and anti-governmental broadcaster TVN influences support for PiS in the expected direction. In addition, those who use radio as the main source of information on the pandemic are more prone to support PiS – unfortunately, our data is not detailed enough to explain this finding, but we suspect these might be the more elderly, rural voters, who have a higher tendency to support PiS.

TABLE 5: COVID-19, MEDIA INFLUENCE AND INCUMBENT SUPPORT

	HUNGARY			POLAND		
	B	S.E.	Exp(B)	B	S.E.	Exp(B)
Government reaction to Covid	2,39***	0,27	10,93	0,98***	0,23	2,65
Job loss threat	0,71	0,48	2,04	-0,39	0,33	0,68
Pandemic financial loss index	0,21***	0,07	1,23	-0,02	0,06	0,98
Pandemic financial loss index	-0,42***	0,09	0,66	0,11	0,06	1,12
Support for entrepreneurs	2,40***	0,35	11,02	1,42***	0,24	4,15
State of healthcare	-0,16	0,33	0,85	0,00	0,11	1,00
Financial benefits due to Covid	-0,68	0,76	0,51	2,00***	0,65	7,38
Abuse of power due to Covid	-0,95*	0,41	0,39	-1,72***	0,38	0,18
TV	0,08	0,25	1,08			
TVP				2,13***	0,35	8,43
TVN				-0,92*	0,42	0,40
Polsat				0,16	0,36	1,17
Radio	-0,53	0,29	0,59	1,02*	0,45	2,76
Newspapers	-0,10	0,52	0,91	1,12	0,67	3,06
Internet portals	0,48	0,27	1,62	-0,21	0,38	0,81
Social media	-0,15	0,24	0,86	0,54	0,42	1,72
Gender	0,11	0,25	1,12	0,30	0,22	1,35
Age	0,01	0,01	1,01	0,01	0,01	1,01
Education	-0,41**	0,15	0,67	-0,02	0,19	0,98
Job status	0,17	0,25	1,19	0,65**	0,24	1,91
Constant	-1,32**	0,58	0,27	-3,35***	0,69	0,04
-2 Log likelihood	540,107a			643,753a		
Chi-square	1135,375			407,003		
df	17			19		
Sig.	0,000			0,000		
Cox & Snell R Square	0,59			0,33		
Nagelkerke R Square	0,81			0,51		

Source: Own calculations, wave 2 separately for Hungary and Poland.

When examining the role of media, we see that the abuse of power variable becomes a statistically significant predictor for voting for Fidesz and PiS once media variables are added to our explanatory model. This confirms media consumption influences the perception of the integrity of government actions. It seems irrespective of the media source or type, people who do seek information on Covid-19 using various media have a clearer evaluation of government action (be that positive or negative). Our immediate interpretation is that those who inform themselves about the pandemic using any media source are most likely

also the persons who will possibly learn about allegations of government abuse of power in relation to the pandemic and thus have their vote choice affected. Unfortunately, our data is unable to explain the direction of the change and further studies are needed to fully explain how information effects might in fact work both for and against incumbents.

8 DISCUSSION AND CONCLUSIONS

The most important conclusion of our analyses is that political accountability remains important even in the times of an extraordinary crisis such as the Covid-19 pandemic. Nevertheless, one should be cautious about claims that voters evaluate crises and their management similarly to other political issues or policies. We have demonstrated that an extraordinary crisis will most likely result in an immediate rally around the flag effect, the entire electorate (not only supporters of incumbents) can increase support of the government if there is great sense of threat due to an unprecedented disruption of human life. This was more clearly visible in the case of Poland than in Hungary, with PiS gaining 4-5% in votes while Fidesz gained only 2% in support, but the same trend could be observed in the Netherlands, Germany or Lithuania (Political Capital 2020). At the same time, such a rally around the flag effect might last little or may not always occur, we know that countries that were particularly hard hit by the first wave of the pandemic (UK, Spain) rather experienced a drop in approval rates. We believe this is explained by the punishment-reward mechanism of political accountability and it is exactly the difficulties experienced by these countries in the very first wave of the Covid-19 crisis management that are responsible for quickly pushing people away from, rather than rallying them to the flag.

Notwithstanding the importance of the initial reaction of societies to rally around the flag, we demonstrate that this is only a temporary response, and it is followed by a more critical evaluation of government actions by voters, who find themselves in a prolonged crisis. The on-going pandemic situation forces voters to re-evaluate the actions of their governments, and it is at this time that the availability of healthcare services, economic relief packages or policies aimed at protecting or helping individuals become paramount for deciding on the approval rates for incumbents. While both Poland and Hungary was largely unaffected by the first wave of the pandemic, the second and consecutive waves of the pandemic had a serious toll in human lives and impacted greatly on the every-day life of citizens. This results in a more critical view of governmental efforts to deal with the pandemic that translates into a continuous drop of governmental approval ratings, again much more visible in Poland (PiS losing more than 10% in approval rates) than in Hungary (4-5% drop for Fidesz), although we see the changes in approval rates follow the direction predicted by our punishment-reward mechanism of political accountability.

Our data show that the prolonged Covid-19 pandemic raised important concerns among voters, largely similar in the two countries, except for job-loss feared almost twice as much in Poland, while Hungarian voters feared more financial loss due to Covid-19, almost at the same rate. We explain this difference by the different approach the two countries adopted in their economic relief efforts: Hungary targeted mainly employers with labour cost subsidies and tax exemptions, with unemployment benefits and social assistance unchanged; Poland instituted only incremental increase of unemployment and sickness benefits that were then extended (Aidukaite et al. 2021). Moreover, while these

fears of Covid-19 were shared across the political spectrum in Poland, in Hungary it is opposition voters that fear a financial loss (and their jobs), which is much less the case for Fidesz supporters. These differences proved important for our analysis, as our first results show that in Poland neither the threat of losing one's job, nor that of financial loss due to the pandemic prove significant to explain voting preferences, while in Hungary financial loss due to Covid-19 is significant predictor for decreasing support for Fidesz. Notwithstanding this difference, results prove that government reaction to the pandemic is the most significant predictor of voters' preferences, which confirms our expectations that in times of crisis, citizens vote based on how well they think the government is dealing with the crisis.

We also find that evaluation of government management of the crisis together with the economic relief measures to compensate for losses due to the pandemic are the key determinants behind electoral support. Yet again, in Hungary, fear of financial loss remains an important predictor but what is more important is that as the pandemic progresses and is 'normalized' into everyday life, we see the significance of other factors decrease (e.g. Covid-19 perceived as a threat), more specifically even our control factors such as age, education, or job status loose from their significance (in Hungary) or become insignificant (in Poland). In other words, while traditional socio-economic explanations behind government evaluation weaken, we see that crisis response and relief policies remain key determinants for judging governing parties even at the later stages of the pandemic. This is also confirmed by the high values of r squared of the model, though the very high score for Hungary seems to be partly because many of the explanatory factors are perceived very differently by government supporters and opposition voters.

When we examine together the effect of Covid-19 factors with political issues related to the crisis, we find once again that what matters most is how the government deals with the crisis. We confirm once more that positive evaluation of crisis response policies and economic relief measures are equally predicting more support for governing parties. Interestingly, the troubled status of the healthcare system in both countries leaves voters indifferent, although we expected that the high death-toll, at least partly attributed to limited healthcare possibilities, would kick-in voters' punishment mechanism with regards to government parties. In the same way, although opposition forces and independent media outlets in both countries have rallied against non-democratic steps taken by the governing parties under the disguise of the pandemic, we find no significant effect of power abuse on voters. The only factor that negatively affects incumbent parties' support is claims that they engage in corruption to make money out of the pandemic for themselves or their close associates.

While for most of the analysis the two countries largely fare the same way as we expect (with the exceptions noted above), it is here that the situation in Hungary differs from that in Poland significantly. More specifically, although we expect both abuse of power and corruption related to Covid-19 policies will be severely punished by voters, instead we find that in Hungary, neither of these issues affects incumbent support, while in Poland corruption – but not abuse of power – will result in less support for incumbents. Our data does not allow for further investigation, but the results suggest a rather cynical conclusion that in both Hungary and Poland, citizens accept abuse of political power as a natural part for politics and it is only in Poland where governmental corruption or patronage seems to bring severe consequences for incumbent support.

While there may be some truth in these bleak expectations regarding illiberal governments in the EU's two most criticized members, we believe our results should be interpreted differently. If we consider the analysis together with the distribution of the survey responses, we can see that the punishment-reward mechanism does matter in fact, but it only acts as 'accelerator' or 'accentuator' of partisanship, at least for Hungary. We see that in Hungary, government supporters judge the entire Covid-19 pandemic and all its aspects more positively than opposition voters, who in turn see negatively almost every aspect of government action during the pandemic. This way the pandemic only seems to reconfirm existing polarization of society: supporters of Fidesz are convinced the government is at its best in dealing with the crisis, while opposition supporters seem to evaluate negatively every adopted policy – and blame the government party for all ills. (This might be also the reason why we see a much weaker rally around the flag effect for Hungary than in Poland).

In addition, we find only limited evidence that different media consumption habits would result in different evaluations of government in times of the pandemic. This way we cannot confirm expectations that social media consumers would have more radical opinions than those that rely on more traditional media. While our imperfect data allows only for more detailed evaluation in Poland, we do find that pro- and anti-government media consumption – more precisely TV consumption – does reinforce partisan views: those consuming pro-government TV are also more likely to vote for incumbent parties. We also find radio consumers to be more pro-PiS, which we cannot explore further given data limitations, but might be attributed to the prominence of specific pro-government stations, such as Radio Maria especially among the elderly, rural voter. As such, our results seem to confirm the importance of partisan media consumption for determining vote choice (at least for Poland). This in turn leads us to conclude that government control of media and information is crucial for incumbent support, and since both Hungarian and Polish governments have moved towards controlling media, this might help shield government actions from criticism (not only in crisis).

As such, our study shows that although the Covid-19 pandemic is a world crisis that affects all, it is experienced in different ways by societies in different countries. While there are general reactions among citizens with regards to restrictive measures or the halt of economies, we do not find a uniform reaction to these controversies. More precisely, although we expect the punishment-reward mechanism of governmental accountability to intensify in the prolonged crisis, instead local, contextual conditions – such as the health of the economy, institutions of social protection or the nature of the political regime – will determine not only how citizens react to their governments' attempts to deal with the crisis but also how they see the crisis itself. More importantly, polarization of society along partisan lines affects not only how governments are evaluated but also how severe the crisis is perceived, despite the extraordinary nature of the Covid-19 crisis.

Extreme political polarization, reinforced by partisan media consumption, leave people immune of the negative effects of misguided or inappropriate pandemic policies. This is why we see little or no increase in critical evaluation of government action, despite the immediate and direct effect of pandemic policies on people's everyday life. Instead, we find that societal polarization and partisanship explain government endorsement, people are little affected by the

available healthcare services, the economic relief packages or the abuse of political power, corruption related to pandemic, and media consumption habits. In other words, even an extraordinary world crisis is unable to bridge extreme political polarization and fails to trigger more critical evaluations of populist authoritarian governments in office, despite their weak record of dealing with the crisis. Instead, we see Covid-19 become just another issue – like any other political issue – that only further divides society, permeating conditions that disable the functioning of accountability mechanisms without which democratic politics cannot function.

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APPENDIX

Variables Coding and Distribution of Responses

Dummies:

The evaluation of the government reaction to the pandemic - 1 - government reacted adequately; 0 - government reacted in an exaggerated fashion and they are underestimating the threat.

The threat of losing a job because of the pandemic - 1 - those who have already lost their jobs or are very likely to lose it; 0 - others.

The evaluation of governmental support to protect the economy from negative impact - 1 - it is a good and well-targeted set of measures which helps in dealing with the current problems, 0-others.

State of the healthcare system - 1- respondents convinced that healthcare has been neglected and underfunded for years, so it doesn't cope with the epidemic, 0 - others;

Conviction that the government has used the epidemic situation to further strengthen its power by declaring an emergency and carrying out its previous policy plans - 1 - definitely agree, 0 - others;

Conviction that the government and those associated with it engaged in completely opaque activities and made a lot of money during the crisis - 1 - definitely agree, 0 - others.

Indices:

Pandemic threat index – additive index of variables measuring the perception of Covid-19 as a threat for the national economy, the health of Hungarians/Poles, their everyday lives (in Polish questionnaire only), personal financial situation, personal health (in Hungarian questionnaire there were two health items: about physical and mental health), inflation and price rises, and lasting shortages of goods (we created an index measuring perception of Covid-19 as a threat ranging from 0 to 7; for Poland, Cronbach's Alpha = 0,8 for both waves, for HU = 0,7 for both waves).

Pandemic financial loss index - perceived influence of the pandemic on personal financial situation: savings and investments, a reduction or elimination of income, an ability to give material assistance to members of your family, ability to pay bills (electricity, water, gas, waste disposal) and an ability to repay credit, loans, monthly maintenance etc. (we created an index ranging from 0 to 5; for Poland, Cronbach's Alpha = 0,9 for both waves, for HU = 0,8 for both waves).

Distribution of key variables

	Hungary w1	Hungary w2	Poland w1	Poland w2
Vote choice				
Vote for governing party	28,4%	30,5%	27,9%	21,8%
Vote for other party	71,6%	69,5%	72,1%	78,2%
Government reaction to pandemic				
Positive	29,6%	29,1%	27%	30,2%
Negative	70,4%	70,9%	73%	69,8%
Risk of losing a job				
Yes	44,9%	7,7%	12,2%	15,1%
No	55,1%	92,3%	87,8%	84,9%
Pandemic threat index				
0	14,4%	44%	22,2%	40,8%
1	13,5%	14,9%	23,6%	17,3%
2	17,5%	10,4%	17,4%	12,6%
3	16%	9,3%	13,5%	11%
4	15,1%	9,8%	9,3%	5,4%
5	11,8%	6,2%	14%	12,8%
6	8,3%	2,5%		
7	3,3%	2,7%		
mean (s.dev.)	2,89 (1,98)	1,69 (1,99)	2,06 (1,99)	1,61 (1,77)
Pandemic financial loss index				
0	48,7%	68,2%	33,8%	36,9%
1	9,1%	6,3%	11,3%	10,4%
2	10,2%	4,2%	11%	11,8%
3	10,2%	6,5%	12,7%	12%
4	9%	7,8%	8,4%	7,7%
5	12,9%	7%	22,9%	21,3%
mean (s.dev.)	1,66 (1,87)	1 (1,68)	2,2 (1,99)	2,07 (1,98)
Evaluation of support for entrepreneurs				
Positive	78%	79,2%	85,3%	80,8%
Negative	22%	20,8%	14,7%	19,2%
State of healthcare				
Bad	71,6%	40,2%		72,4%
Good	24,8%	59,9%		27,5%
Financial benefits due to Covid				
Yes	67,7%	61,8%		66,1%
No	32,3%	38,1%		33,9%
Abuse of power due to Covid				
Yes	65,5%	63,6%		58,4%
No	39%	36,4%		41,5%
N	1740	1685	702	1002

Source: Own calculations, waves 1 and 2 for each country.



COVID-19: KRIZA, ODGOVORNOST IN PODPORA POPULISTIČNO-AVTORITARNIM VLADAM NA POLJSKEM IN MADŽARSKEM

V prispevku analiziramo kako je krizno upravljanje med pandemijo covid-19 vplivalo na javno podporo v demokratično nazadujočih članicah EU – Poljski in Madžarski. Trdimo, da je prvi, takojšnji učinek pandemije "združevanje okoli zastave", toda ker populistične neliberalne vlade sprejemajo avtoritarne ukrepe, pandemija postavlja v ospredje neuspeh populistov in neučinkovito krizno upravljanje, zato bi moralo nezadovoljstvo javnosti zmanjšati podporo politike, ki je na oblasti. Na podlagi izvirnih anketnih podatkov, zbranih v času pandemije covid-19, testiramo več možnih virov nezadovoljstva: stanje v zdravstvu, gospodarstvo, korupcija in zloraba oblasti in izkrivljena komunikacija oziroma lažne informacije. Državljeni, ki so nezadovoljni z delovanjem vladajočih populističnih strank, bi morali biti pripravljene kaznovati "krivca", vendar ugotavljamo, da strankarske preference vplivajo na ocene odgovornosti vlade in puščajo podpornike imune na negativne učinke politike. Če primerjamo Madžarsko s Poljsko, vidimo, da bolj kot je družba polarizirana, večja je verjetnost, da bodo izredne okoliščine okrepile delitve v družbi in s tem tudi obstoječe oblasti.

Ključne besede: Covid-19; odgovornost; strankarstvo; javna podpore; demokratično nazadovanje.



COVID-19 AS A TOOL TO TARGET DEMOCRATIC INSTITUTIONS AND VALUES: THE CASE OF HUNGARY

Lilla TÓTH, György LENGYEL and Borbála GÖNCZ¹

The Covid-19 epidemic in Hungary contributed to the decline of democracy in two ways. The direct effect was the declaration of a state of emergency by the government and the shift to decree government (from spring 2020 until now, first with reference to the epidemic, then later with reference to the war in Ukraine). The indirect effect has been spreading disinformation about the EU and the domestic political opposition in the context of the epidemic. Disinformation erodes the public trust in institutions, including the media itself, and poses a threat to democratic values and political processes. Based on data from international empirical research the paper shows the process of the breakdown of democracy and the accompanying legitimating media discourses.

Key words: Covid-19; disinformation; media; EU; polarization; populism.

1 INTRODUCTION

The government's democracy-destroying actions on the grounds of the Covid epidemic in Hungary are only a part of a long process which last period began with the second Fidesz government in 2010. From 2010 until now, Fidesz governments have used a variety of means to consolidate their autocratic power (Eötvös Károly Policy Institute 2018; Drinoczi 2020; Gado, Kerekes and Magyar 2024).

According to Ágh (2022, 77) “in the euphoric days of the accession of ECE (East Central European) countries the convergence was the basic term, but later the divergence between the East and West has become deeper and wider and its

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recognition in the EU has been hopelessly delayed.” He states also that after the periods of De-Democratization and Autocratization from the 2020s onwards we are in the De-Europeanization stage which is “offensive” and “conflict-seeking” representing the interests of this newly emerged autocratic system against the EU.

In the 2010 elections, Fidesz won a constitutional two-thirds majority in parliament, and this meant a monopoly of political power. In Hungary's case, this means that “a political force can change the constitution, pass any law - even one requiring a two-thirds majority - on its own, without the need for consultation and consensus with other political forces, and fill the institutions of checks and balances with its own loyalists.” (Gado, Kerekes and Magyar 2024, 11).

Three factors made the autocratic breakthrough in 2010 possible. The disproportionate electoral system, with 53% of the vote in 2010 and 44% in 2014, was enough for a two-thirds majority in parliament. Concentration of executive power: the lack of independence of the President of the Republic from the government and the fact that a two-thirds majority in parliament is sufficient to amend the constitution or even adopt a new constitution. All this has allowed the constitution to be constantly adapted to the power and political needs of the moment, and the introduction of a system of government by decree from 2020. The new Fundamental Law was voted by Parliament on 18 April 2011 and has been amended 12 times in the 12 years since then. These amendments have affected more than half of the current 166 sections of the Constitution.

Institutional changes have tended towards the establishment of an electoral autocracy, in order to ensure the irremovability of the incumbent elite. The Constitutional Court, the functioning of the Parliament, the institution of president of the Republic, the court, judiciary, the central state control bodies and the local governments were all affected. Meanwhile many fundamental freedoms were violated (freedom of expression, freedom of information, right of assembly, right of association and property rights) (Gado, Kerekes and Magyar 2024). The latest development regarding the state of rule of law is that in December 2022, European Union institutions suspended and tied to conditions Hungary's access to EU funds under various procedures due to severe breaches of the rule of law and human rights (Amnesty International Hungary et al. 2023). For the period of the Covid epidemic (from March 2020 to February 2022), we will examine how two interlocking tools have reinforced autocratization processes: governing by decree (Soltész and Palotai 2020) and government participation in the dissemination of disinformation.

2 DECREE GOVERNMENT

In most countries, the constitution contains provisions for special cases where, in the interests of efficiency and or speed, the normal legislative process is suspended, and the government legislates and governs without the time-consuming democratic decision-making process. These cases are usually defined in the constitution, also in Hungary (Ministry of Justice 2019), together with the details of the rule by decree. Today, Hungary has had four years of decree government and is likely to continue. It seems that in Hungary's illiberal democracy, the aim of government is to govern by decree, and any pretext is used to do so.

2.1 The legislative history of government by decree

According to Szentes and Vörös (2024) since 2010, the restructuring of the government and the strong position of the Prime Minister have also provided an opportunity to re-politicise professional decisions and the senior levels of public administration. Unlike in the past, the government programme did not have to be voted on, making political accountability of the government impossible. Another instrument facilitating political irresponsibility is the secrecy of government meetings. One of the measures restricting freedom of information was the encryption of government meetings. After 1989, post-transition governments have repeatedly attempted to abolish the documentation of the content of government meetings. As of summer 2018, government meetings are no longer legally audio-recorded, since 2010, this has been done despite a legal requirement not to do so (Eötvös Károly Policy Institution 2018).

Apart from that, the documentation of government meetings is incomplete, the situation is not much better as regards the decisions taken. Only some of the decisions are published in the Hungarian Gazette in a way that is accessible to everyone. Others are either classified or simply not made public. In the first half of 2024, a total of 152 decisions were taken that cannot be disclosed. These include the so-called three thousand decisions, which are officially considered secret. Under the law, they become national classified data - depending on their content, for 10, 20 years, or 30 years with the stamp "Top Secret". The latter classification can be extended twice, so that their content can be kept secret for up to 90 years (Lengyel 2024).

Following this development, the government was granted full powers under the special legal order. The legislative basis for the three states of emergency created by the special legal order was the threat of mass immigration, a state of pandemic health emergency and a state of war emergency (Szentes and Vörös 2024).

From September 2015, the threat of mass immigration gave rise to the proclamation of a state of emergency, which, despite the lack of both constitutional basis and factual conditions, has been renewed every six months by Parliament (by a simple majority) on the proposal of the Government. Last time the Government extended the "state of crisis caused by mass immigration" until 7 September 2024 by Government Decree 47/2024 (4 March 2024), and it is planned to be maintained until next March.

After the outbreak of the coronavirus epidemic, the reference basis for the exceptional legal regime was doubled with the declaration of an epidemic alert on 11 March 2020. The law on the control of the coronavirus (First Enabling Act), adopted on 30 March 2020, authorises the Government to declare the end of the state of emergency by decree. Parliament may only decide to repeal the law, not directly to end the emergency which is a condition for its repeal. On a combined reading of the two provisions, the Hungarian Parliament has delegated to the Government the power to determine the date of repeal of the Enabling Act. In doing so, the Government has been given a mandate which is essentially open-ended.

On 16 June 2020, the Parliament repealed the law providing the framework for the legislation of regulations, but the following day the Government - based on a law passed the previous day, without any constitutional basis - proclaimed the health crisis, which was not included in the Fundamental Law as a case of

exceptional legal order, and which lasted until 18 June 2021. On 3 November 2021, the Government again declared an epidemic emergency, and on 10 November the Parliament adopted the Second Enabling Act, which, however, also provided for its own expiry after 90 days. On 8 February 2021, the emergency was redeclared and the National Assembly adopted the Third Enabling Act. On 1 January 2022, the Third Enabling Act was extended until 1 June 2022.

The third basis for the special legal order was the state of war, which was introduced on the grounds of the war in Ukraine, and which will be extended by Parliament every six months from 25 May 2022 (most recently until 19 November 2024). In parallel with the migration crisis, the war in Ukraine is now the basis for the special legal order.

Drinóczy (2020, 1) in the early stage of the Covid pandemic claimed that the Hungarian government abused the constitutional emergency regimes: “Hungary could exemplify how to be constitutionally well equipped to deal with emergencies and still able to abuse them ... the abuse and misuse of constitutional emergency regimes, in Hungary, have two layers: the actual abuse of emergency powers, be those extra-constitutional (the “crisis situation caused by mass migration” since 2015) or (partially) non-constitutional (COVID-19 crisis 2020), and the abusive regulation of emergencies and powers (2015, 2016, 2020) by bypassing constitutional procedures and resorting to secrecy, including the non-transparency of decisions and vague drafting.”

2.2 How the Hungarian government abused the special legal order during the Covid - pandemic

In the period from 11 March 2020 to 8 February 2021, 651 government decrees referring to emergency situations were published, only some of which were related to the slowing of the epidemic and reducing its socio-economic impact (Soltész and Palotai 2020). Unjustified extension of time and scope was a common feature of decrees of that period, there were decrees which have gone beyond the principle of the temporary nature of the exceptional legal regime and have entered long-term legal relationships. At the other extreme are government decrees which, although they may be related to the emergency, contain provisions which unduly restrict the beneficiaries of the legislation, or which disproportionately restrict fundamental rights. According to experts the already existing regulations would have been enough. Even the part of the measures aimed at epidemic management could have been taken within the framework of the Disaster Prevention Act or the Health Act, without the exceptional authorisation of the Government (Soltész and Palotai 2020). As for the economic impact of the pandemic from the view of corruption researchers (Martin 2021) under the conditions of state capture, during the pandemic, the government has used the extraordinary circumstances to further concentrate its power and extend cronyism. Discrimination against opposition-led local governments has been conspicuous; first the municipalities were deprived of a significant portion of their own revenues (proceeds from the vehicle tax were redirected to the state budget, and the local business tax was halved), after which some were compensated – if they were governed by Fidesz (Pető 2020).

The government has also used the pandemic to unilaterally modify the electoral law and change the constitution (Fundamental Law) for the ninth time since it was passed in 2011. Several government decrees have been adopted to create a legal basis for measures that cannot be linked to the emergency. The most blatant

of the former were the decrees allowing private companies to be placed under state supervision. The so called *Kartonpack* (Domány 2020) decree was an example under which the company's management was immediately dismissed by the government commissioner who took over ownership.

The intensification of cronyism is reflected in the fact that the government has spent more extra funds on sports and churches than on healthcare since the outbreak of the pandemic in March 2020 (Székely 2020). Social transfers to those in need, particularly individuals who lost their jobs due to the crisis, have been very limited. The Covid-19 crisis management by the Hungarian government has favoured companies over workers, and social dialogue has become even more limited (Czifrusz 2021). In 2020 a managing authority, the Hungarian Tourism Agency distributed 230 million euros in support to the sector without any transparency or equal and normative access to resources. The beneficiaries from this scheme have known links to the ruling administration. Further example for rewarding members of the adopted political family is the emergency-related, but unduly narrowed scope, which was the provision of leverage support for sectors important to businesses close to the government, such as wine products or tourism. State support for port business in Balaton and for rural hotel development (170 billion HUF or for the World Hunting Exhibition (1.67 billion HUF). The reference to the epidemic emergency provided an opportunity to override public procurement rules in favour of companies close to the government. As a consequence of that the government acquired for HUF 300 billion respirators that have been largely unused - and stored or donated abroad for HUF 15 million a month - and have been donated for free, 722 billion for vaccines (there is no data on the purchase of Chinese and Russian vaccines), tests, masks, and built and maintained epidemic hospitals etc., which later became empty.

The economic consequences are severe, despite the stability of the Hungarian economy over the decade leading up to March 2020, cronyism, corruption and serious distortions of the institutional system have prevented Hungary from pursuing inclusive growth (Martin 2021). The state of emergency offered also an excellent opportunity for the government for symbolic and propaganda activities. The government demonstrated alertness and power by ordering of the involvement of the armed forces and the right to use weapons in the context of an epidemic emergency. Reducing transparency and maintaining and increasing secrecy was also characteristic feature of this period. The fight against the EU happened in every possible forms. For a long time, the Government opposed the common European vaccine procurement, which is a sensible step in a health crisis, because of the lack of extra profit that can be outsourced.

Strengthening earlier propaganda against migrants, LGBTQ people and feminists did not cease even during the epidemic. The case of the Iranian students shows that the government has seized every opportunity to continue its anti-migration propaganda and to link migration with the spread of the coronavirus (Hungarian Helsinki Committee 2020b). The amendment of the Act on Civil Registration Procedure, based on which gender cannot legally be changed anymore in Hungary. During the pandemic, the government felt it was time to amend Act I of 2010 on Civil Registration, with which they made gender at the time of birth unchangeable in the civil registers. The amendment represents an open attack against the rights of transgender and intersex people, it violates fundamental constitutional rights, and it clearly violates the right to human dignity and the respect for private and family life (Soltész and Palotai 2020). Rejection of the

ratification of the Istanbul Convention, on 5 May 2020, the Parliament also voted for the rejection of the ratification of the Istanbul Convention. The related political statement, no. 2/2020. (V.5.) of the Parliament is a symbolic manifestation of the hate campaign that the Hungarian government has been conducting since 2015 against refugees, civil organizations, the EU, the UN and everyone else who criticized their policies (Soltész and Palotai 2020). The legislative solution of punishing the expression of opinion happened by the modification of the scaremongering provisions of the Criminal Code. The bill expanded the definition of scaremongering (Article 337 of the Criminal Code) with a new basic case (Soltész and Palotai 2020).

2.3 Decree government without reason - make the exceptional become the norm

Despite the lack of mass immigration and war in Hungary, the Hungarian government has maintained emergency conditions since 2015, and the decree governance started in 2020 in the wake of the epidemic emergency. Based on the uninterrupted governmental practice of the past years and the lack of political-social protest, it can be concluded that the state of emergency has become the norm. Its legitimacy is unquestioned by nearly half of the electorate, and it has become commonplace as a justification for invoking law-limiting decrees and for sidelining Parliament - the democratic political will. The 'anti-sovereignty' package of laws adopted in December 2023 is the culmination of this process and the beginning of a new era: severe restrictions on fundamental rights, in this case surveillance, or criminal proceedings based on the vague grounds of sovereignty protection, are now possible regardless of any threat. In all these cases, the Fundamental Law is not a limit, but a supporting and referable legal framework.

3 DISINFORMATION - STATE OF AFFAIRS

COVID-19 disinformation campaigns by foreign states, mainly China and Russia, exploited the pandemic to discredit the EU and democratic governance in general. European states such as France and Italy were targeted by disinformation campaigns launched by autocratic regimes to suggest that the latter were more effective and successful in managing the crisis compared to European democracies (Parola 2020). Additionally, disinformation campaigns created misleading narratives such as the EU's alleged lack of assistance to partners and to third countries, highlighting instead the benevolence of China and Russia (Bayer et al. 2021). This prompted the European Commission to publicly identify China and Russia as the main perpetrators of online disinformation. The EU has recognized the pandemic opened the door for disinformation campaigns seeking to undermine European democracies and the credibility of the EU and of national or regional authorities. It also accused Russia and China of "seeking to undermine democratic debate and exacerbate social polarization and improve their own image in the COVID-19 context" (European Commission 2020). EUvDisinfo (2020b) identified four narratives targeting the EU include:

1. The EU is failing to deal with the pandemic and that the EU is on the verge of collapse. This narrative was disseminated by pro-Kremlin sources and several domestic networks/sources in EU and beyond.
2. The EU is selfish and betrays its own values. This narrative was also disseminated by pro-Kremlin sources and several domestic networks/sources in EU and beyond.

3. Russia and China are responsible powers. Pro-Kremlin media focused on Russian aid delivered to Italy, proclaiming that “Russia is helping Italy and the EU is not”. Pro-Kremlin sources also depicted the Chinese “global project” as superior to the EU. Chinese state-controlled media and social media channels strongly promoted the idea that the Chinese model is superior in tackling COVID-19, while highlighting global expressions of gratitude for Chinese aid delivery, including in Italy.
4. Lastly, the EU is exploiting the crisis to advance its own interest.

In that part of the article, we wanted to explore to what extent these narratives or variants of them could be detected in the media coverage of the COVID-19 in Hungary.

3.1 Disinformation, polarization and media narratives

Disinformation is defined as “false, inaccurate, or misleading information designed, presented and promoted to intentionally cause public harm or for profit” (European Commission 2018a, 10). The term fake news however fails to capture the complex problem of disinformation, which involves content that is not completely “fake”, but fabricated information blended with facts, and practices broader than the notion of “news”, such as creating automated accounts used for astroturfing, networks of fake followers, fabricated videos, organized trolling, and visual memes. Additionally, the term fake news has been used by some politicians and their supporters as a tool to dismiss coverage that they find disagreeable (European Commission 2018a). The harms of disinformation include threats to democratic political processes and values, and can specifically target myriad sectors, such as health, science, education, finance and more. The harm of disinformation was also recognized by subsequent instruments of the EU, highlighting that disinformation “erodes trust in institutions and in digital and traditional media, and harms our democracies by hampering the ability of citizens to take informed decisions. Disinformation also often supports radical and extremist ideas and activities. It impairs freedom of expression” (ibid., 1).

Being uncostly and highly efficient, disinformation has been deployed by state and non-state actors as a key tool for exerting influence (European Commission 2018b). Disinformation intervenes with the democratic order in two ways. First, disinformation dominates and distorts public discourses and corrupts the process of democratic decision-making on central issues of public interest. Second, when disinformation campaigns lead to political success, the political force that won the elections through manipulation might deconstruct the constitutional order of the state (Bayer et al. 2019). Disinformation also increases polarization in society and contributes to lowering trust in mainstream media and institutions (Vériter, Bjola and Koops 2020). One of the indirect effects of disinformation is the tempting of heads of governments to infringe upon civil liberties. As Vilmer et al. (2018) argue, this could be the true end goal of the foreign powers behind disinformation campaigns, that is, to lead governments to take measures that are contrary to their democratic and liberal values.

Very often, the narratives promoted by disinformation campaigns exploit pre-existing tensions in society on contentious issues such as migration, crime, the rights of sexual minorities and reproductive rights. Messages could also be inflammatory and provoke fear, disgust, and surprise, or conversely might appear benign, since they are designed to distract the audience from certain issues (Bayer et al. 2019).

Government-owned or government-sponsored media outlets may constitute an important vehicle for the dissemination of disinformation (Vilmer et al. 2018). As for ideological and partisan media outlets, they also promote misperceptions aligned with their ideology. A study by Garrett, Weeks and Neo (2016) suggests that partisan media promotes misconceptions about reality at least in two different ways. First, partisan media outlets often question the credibility of experts whose conclusions challenge their ideology. Second, on some occasions, they promote misunderstandings of evidence. Likewise, mainstream media outlets can unwittingly propagate disinformation. As Marwick and Lewis (2017, 22) argue “[a] conspiracy theory could now go from fringe speculation to the headlines of network news within weeks. And even if the mainstream news was reporting on it in shock or disgust, it still led millions of viewers and readers to be exposed to these ideas”.

3.2 Populism and disinformation

There are variants of populist ideology, not all of which represent extremism on the political palette, but they can be said to be characterized by anti-establishment rhetoric, undifferentiated reference to the people, pragmatism, and a confrontational and mobilizing approach (Mudde and Kaltwasser 2011; Kriesi 2014; Rooduijn et al. 2019; TAP 2024). Populism may appear both on the left, and on the right. Populist narratives may thus be different according to ideological contexts and more importantly, they may differ depending on whether the party is in opposition or in government. A common feature of populism in opposition is that it thematizes the social problems perceived by many, appearing in such a colour that they are the ones who dare to tell the truth. While anti-establishment rhetoric is strong, the policy vision is narrowed, the thematization is one-sided. The focus of the proposed solutions is mostly on some combination of denial, restitution and discrimination.

Populists in power tend to build upon the supposed charismatic features of the leader, to force political polarization, to strengthen clientelism and weaken independent institutions, often by creating a new constitutional order (Pappas 2019). A study on the effectiveness of epidemic management measures found that populist policies are less consistent, less supportive to minorities and are more open toward radical change than liberal ones (Bartha, Kopasz and Takacs 2020). They tend to circumvent institutional and professional constraints, as well as political and civic participation. They rely more on discursive governance toolkits and tabloid communication panels, more frequently apply divisive narratives.

One of the paradox features of populism is that the main source of its popularity, the credit for anti-establishment political rhetoric may erode when getting into a government position - like Fidesz in Hungary (Körösényi and Patkós 2017; Ilonszki and Lengyel 2019) - they themselves become part of the establishment. Then they must create or amplify a new image of the enemy, which could mean that the external threat, the EU, the multinational companies and global organizations are cross-targeted, or from the other end: immigrants, foreigners, and disadvantaged minorities. Another strategy is to allude to the existence of a ‘deep state’ of elites controlling the media and finance. Beyond disinformation the old methods of liquidation of freedom of expression and of the press also support the establishment of an authoritarian state. The link between disinformation and populism may appear in at least two ways. The more general

link is that anti-establishment rhetoric of populism tends to undermine epistemic trust (Campbell et al. 2021), that is to question the credibility of science and the media. The other, more specific link has to do with populists in government. Populist national leaders - while creating the image of the enemy - may question the viability and credibility of supranational co-ordination, making supranational institutions target of a blame game.

Before the COVID-19 epidemic, epistemic trust in Hungary was below the EU-average. It was especially true in the case of the trustworthiness of the national media. While majority (53 %) of EU-citizens – and within that more than three-quarters of Scandinavians – trusted the national media, the proportion of this opinion was only 44 % in Hungary (European Commission 2016).

3.3 The frame – the short story of the COVID-19 pandemic in Hungary

In this section first we briefly summarize the information about Covid-19, then we describe in more detail the frames of events and conditions of the epidemic in Hungary. As Table 1. shows, the epidemic hit Hungary in March 2020 and vaccination started in December 2020. The most severe wave fell after the start of vaccination. Newly developed Western vaccines have been applied but Chinese and Russian vaccines were also widely used, especially at the beginning of vaccination. Traditional vaccines (Sinopharm, Sputnik V) typically require growing large amounts of infectious viruses and then inactivating them — a process that can take weeks or months. However, modern mRNA vaccines can be quickly designed, tested, and mass produced. The Hungarian data both in terms of mortality and vaccination are one of the worst.

TABLE 1: THE COVID -19 PANDEMIC IN HUNGARY

	HUNGARY
Waves of the pandemic so far	5
The most severe wave	the third (climax 17 April 2021)
Death per 100,000 population	504.76 (the 3 rd worst in the world after Peru and Bulgaria)
First vaccination start day	23 December 2020
Uptake with at least one dose (%)	64.8
Uptake with a complete vaccine series (%)	62.7
Uptake with additional dose (%)	38.3
The vaccines used	Pfizer- Biontech, Moderna, Sputnik V, Astra Zeneca, Sinopharm, Jansen

Source: WHO 2022; John Hopkins University 2024; own compilation.

The first patient to be diagnosed with the Coronavirus in Hungary was on the 4th of March 2020. On 11 March 2020, the government declared a state of emergency (Governmental Decree no. 40/2020). Civil society organisations (Hungarian Helsinki Committee 2020a; Eötvös Károly Policy Institute 2020) criticised the government for declaring a state of emergency. They believe the measures necessary to fight the Coronavirus outbreak did not call for this exceptional legal order and that the state of emergency entitles the government to disrespect almost any fundamental right of the citizen.

In March 2020 new form of the prohibition of panic-mongering or spreading of fake news was also introduced and strengthened during the so-called state of emergency during the Covid 19 pandemic in Hungary. The Bill on Protection against the Coronavirus (Bill T/9790) has two pillars of provisions. First, it seeks a parliamentary mandate for the government to rule by decree without a sunset clause or any other provision that would guarantee that Parliament can exercise its role of effective oversight. Second, the law defines two new crimes. Anyone who publicizes false or distorted facts that interfere with the “successful protection” of the public – or that alarm or agitate that public – could be punished

by up to five years in prison. Anyone who interferes with the operation of a quarantine or isolation order could also face a prison sentence of up to five years. Under the circumstances, that media pluralism has been in decline for years in Hungary, and the relationship between the government and the government-critical press became severely hostile in recent days (Hungarian Helsinki Committee 2020b) these regulations could be regarded as further potential threat against the freedom of expression and press.

In Hungary the purchase of vaccines, ventilators, masks and other medical equipment lacked the necessary transparency and - in the case of ventilation equipment - later proved to be overpriced, low quality, too close to crony business circles, and not justified quantity (Rádi 2020; Sarkadi Nagy 2021). The topic of vaccines bought from Russia and China was embedded deeply in the renewed disinformation propaganda from Russian and Chinese sources.

Reports in March 2021 stated that Hungary was the first country in the EU to "begin using China's Sinopharm and Russia's Sputnik V vaccines, even as polling showed that public trust in non-EU approved vaccines was low" (Spike 2021). With the original orders depleted, Hungary did not offer Sputnik vaccines anymore as of August 2021, however, Sinopharm vaccines were still available for the country's pioneer third dose vaccination programme. The purchase price for the five million doses of coronavirus vaccines made by Chinese company Sinopharm, was 36 USD for a dose, several times that of Pfizer-BioNtech or AstraZeneca vaccines (Sarkadi Nagy 2021). Nearly a third of the elderly who received vaccine were given Sinopharm, even though the manufacturer itself does not recommend its use for people over 60.

Meanwhile a growing problem among people vaccinated with the Chinese coronavirus vaccine appeared. Many people, especially above 60, did not show adequate immunity in post-vaccination serology testing. In July 2021 the results of two SARS-CoV-2 antibody (often referred to as serology) testing from the Municipality of Budapest and Semmelweis University were published, with Sinopharm being the worst performer in both. At the same time, PM Viktor Orbán announced that a third dose will be available from August. Nonetheless, some people have already managed to get an mRNA vaccine after the seemingly ineffective Chinese one (Szopkó and Szabó 2021).

The government never admitted the low performance of Sinopharm, however, to avoid any further problem it offered the third jab, the booster according to the persons' fancy (About Hungary 2021a). In the polarized public sphere, the issue of vaccination proved to be also dividing. The political opposition was labelled as antivaxxer by the governing party because they repeatedly spoke out against the idea of vaccines not authorised by the EU being used in this country. In the public service media, dominated by government propaganda, the original message of the opposition that they suggest vaccination with any vaccines - except those (Sinopharm and Sputnik V) which are not authorised by the EMA, the EU European Medicines Agency - has not been given a voice. The Hungarian government has given more than 4 million doses to other countries (About Hungary 2022). The type of the donated vaccines either are unknown or Sinopharm (ibid.) and Astra Zeneca which cannot be rolled out in Hungary anymore because of the resistance of the people and their expiry date is not known but supposedly close. At the same time, most of the ventilators that have been purchased for 300 billion HUF were in storage without being used, but the government is also giving them away for free: so far, it has gifted 11.7 billion

forints worth of machines abroad. In the context of the health crisis, the anti-EU disinformation efforts took a new turn, in which the EU was systematically portrayed as overwhelmed by the situation and unable to respond to the needs and calls of its eastern neighbours. When we use “Brussels will not help” search keyword (in Hungarian) on Google, we get 313,000 results. On 27th March 2020 Viktor Orbán prime minister of Hungary in one of his weekly radio-programme (Kossuth Rádió 2020) claimed:

“But you have to see that help is not really coming from here [from the EU]. We got help from the Chinese, and I appealed to the members of the Turkic Council, of which Hungary is a member, for help, and we got it. That is the situation at the moment ... But it is good to know, it is good to see, and we are also aware of the weaknesses in the whole structure of the European Union.”

Besides, in January 2021, Hungary became the first member of the European Union to approve the Sinopharm vaccine, signing a deal for 5 million doses (National Post 2021), PM Viktor Orbán was vaccinated, as a loyalty gesture, with the Sinopharm vaccine on 28 February (Euronews 2021). Then 5.2 million doses were delivered to Hungary by May, fulfilling the contract (Budapest Business Journal 2021). On 21 January 2021, Hungary became the first European Union country to register also the Sputnik shot for emergency use. Even though for this time vaccines from the joint EU procurement were on their way (the first Pfizer jab was delivered on 23 December 2020), it seemed to be crucially important for Orbán to show that he is the saviour type leader. The leader who is bringing the vaccines to Hungary, the one saving the country, and at the same time he could point out that salvation comes from the East, not from Brussels. The discourses such as: “without the Chinese and Russian vaccines we would be in great trouble now” or “Brussels will not help, only China and Russia help” are in complete accord with pro-Kremlin propaganda (EUvsDisinfo 2020a) hammering that the EU bodies look pathetic and helpless (EUvsDisinfo 2019).

The so called „national consultation” is one element of the governmental propaganda tool. Since the consultations are not organised in the form of a public opinion poll or civic discussion, but in the form of a simple political questionnaire, neither the questions nor the way they are evaluated are based on professional aspects of public opinion polling (About Hungary 2024). The methodology of the evaluation of the questionnaires is not known. Experts protested several times (Kettős 2015) against the national consultation; the academics and researchers believe that the national consultation is manipulative, undermines the credibility of public opinion polls and creates a false impression among citizens. Nevertheless, in 2017 the “Let’s stop Brussels!” (European Commission 2017) and in 2021 the 11th national consultation (About Hungary 2021b) also used a billboard campaign as part of the political marketing. The government’s political advertisement campaign applied emojis to call on people to fill out the newest ‘National Consultation’ survey. Following a short question, an emoji hints at what perhaps the government wants to see in reaction. Most billboards deal with George Soros, Brussels and the EU, migration, and “sexual propaganda”.

As it has already been mentioned the Brussels “topic” started earlier, the Orbán government wanted to “stop Brussels” already in 2017. In present Hungary, in the public debate Brussels is used as an eponym of the European Union; the empire, the oppressor, the “we know who”, our enemy, which is the main threat to our sovereignty. Based on that observation we decided to analyse those

articles and news items which includes the following keywords at the same time: EU or European Union, pandemic, and Brussels. Disinformation as part of the manifested Euroscepticism in the mainstream media in Hungary occurred very often compared with the scientific disinformation. The findings of a research (Gyóri, Krekó and Istrate 2020) show that the Hungarian nationalistic disinformation narratives are unique for at least three reasons: 1) China was depicted more as a friend than a foe, 2) anti-science narratives were not part of the mainstream, and 3) Covid-scepticism did not become widespread.

3.4 Methods and sample

The methodological approach in this study was qualitative with a double step method, content analysis, firstly, and critical discourse analysis secondly, that allowed to explore the main issue: to what extent the four narratives detected by EUvsDisinfo or some of them could be perceived in the media coverage of the COVID-19 in Hungary. EUvsDisinfo is the flagship project of the European External Action Service's East StratCom Task Force. It was established in 2015 to better forecast, address, and respond to the Russian Federation's ongoing disinformation campaigns affecting the European Union, its Member States, and countries in the shared neighbourhood.

- How does media coverage reflect the EU is failing to deal with the pandemic and that the EU is on the verge of collapse
- How does media coverage reflect the EU is selfish and betrays its own values
- How does media coverage reflect Russia and China as responsible powers supporting European countries.
- How does media coverage reflect the EU is exploiting the crisis to advance its own interest.

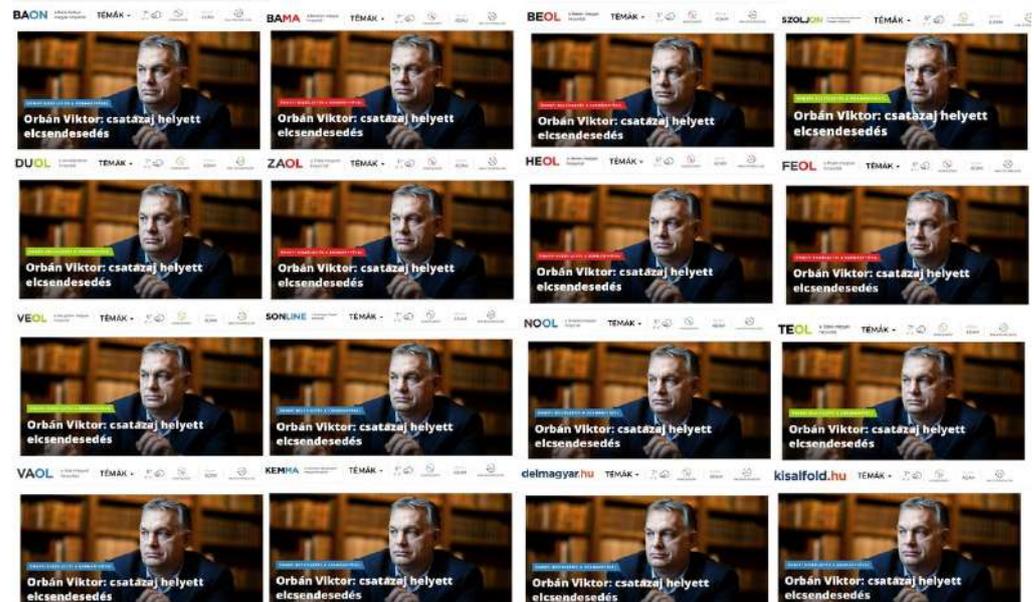
Regarding sample selection it included the following steps: 1) chronological period of study: from July 2021 to February 2022; and 2) media selection: a total of six Hungarian media outlets were selected, four press media and two TVs (origo.hu, magyarnemzet.hu, nepszava.hu, hvg.hu, RTL and MTV1). News sample selection from media outlets during the examined period (between July 2021 and February 2022) were selected in a two-step-process: 1) Capturing all news published by media outlets related to EU, European Union and Brussels; 2) Filtering by keywords (coronavirus, pandemic, covid) all pieces related were included in the sample of study. As a result of this process there were 459 pieces to analyse.

3.5 Results of the media analysis

During the examined period (between July 2021 and February 2022) there were an average 100 related items per month. We focused on those where the keywords were not just mentioned but acted as part of a discourse. Because in Hungary this time was the pre-election period, and the enemy creation or blaming discourses often united the whole range of enemies; Brussels, liberals, the declining west, and the political opposition often fell in the same item, but the discourse dealt with the opposition not Brussels. When ironically describing anti-EU propaganda, Brussels is used not only as a noun but also as a verb as to Brussels (meaning condemns, accuses or blames Brussels, i.e. the EU). Using the items (news from the selected media outlets), we identified the following discourses which would be elaborated later: Discourses on the EU failure to manage the pandemic; the existence of diabolic or an evil plan ruin Europe; Contrary to the EU, Hungary is doing better; the EU is selfish and betrays its

values; China and Russia are doing better; and The EU is exploiting the crisis to advance its own interest. In Hungary the public service media is under governing party influence, and it is considered as the mouthpiece of the government propaganda. In the independent media outlets, the anti-EU propaganda discourses also occur as quotation or in ironic form. The pro-government *origo.hu*, the *magyarnemzet.hu*, the MTV1 introduce the same discourses with the very same wording and repeat it exhaustively. As you can see in the picture below, the government's media content is centrally defined and identical across the board.

PICTURE 1: THE PHOTO OF THE P.M. IN DIFFERENT COUNTY NEWSPAPERS



Source: Szabad Pécs.

These are supposed to be independent county papers. Their political content is all produced in the Mediaworks central editorial office. After it turned out semi-officially that the Sinopharm is not effective for a quarter of people over sixty, the "China is good" discourses vanished. After the last peak of the pandemic, EU-related discourses, instead of pandemic management, started to focus on disputes over the allocation of the part of the recovery fund to Hungary. The EU Commission during the prolonged negotiation requested anticorruption measures and more transparency from the Hungarian government, while in the discourses of the government the EU was blamed for making political instead of policy decisions related to the so-called child protection law (in which the protection of children from paedophiles is mixed with homophobia). From the 24th of February 2022 the topic of the pandemic disappeared entirely and handed over its place to the Ukraine war crisis. The approaching election day on 3rd of April, with the communication turbulence in the Hungarian government (the earlier Putin-friendly behaviour under the circumstances needed some explanation) filled the media spaces.

3.5.1 The EU failure discourses

These discourses, appeared in the pro-government media (which overlap with the public service media in present Hungary), and are often intertwined with the "In contrast, Hungary performs better" and "Russia and China are good" discourses. In these cases, the EU is depicted as slow, unorganized, underperforming entity, blamed for not providing enough vaccine, masks, or ventilator. The EU in this context is guilty not only for the belated initial reactions

at the beginning of the pandemic but for the lack of the quick recovery, or the lack of community funds for recovery. The reports on rebel and brave Hungary who decided to buy vaccines from elsewhere (from China and Russia) are suitable to strengthen both the image of effective, well-organized and generous China and Russia and point out that the EU is starting to fall into chaos. The actual situation and chance of Chinese and Russian citizens has never been discussed. From European cities there were news about aggressive demonstrations against epidemiological measures which emphasised the brutality of police. For the same reason the Hungarian “national consultation” became part of the Covid-related discourses. Using this topic, it was possible to show that Hungary performs better, because instead of oppressing the people (as other countries do) Hungarian government asks for the people’s opinion and will act accordingly. The very last national consultation was about the recovery after Covid pandemic. The media, the national billboard campaign and the questions from the consultation questionnaire (About Hungary 2021b) show that the topic of the pandemic was suitable (at least for the government) to keep in focus the old discourses on migration: the old enemies – Brussels, Soros and the Saviour: Hungarian government (performing better) protecting the borders of Europe.

In the summer of 2021, Budapest hosted a few mass events: the World Hunting Exhibition, the European Football Championship and the Eucharistic Congress. In “the EU is failure and Hungary performs better” discourses it had been often mentioned that it would have been a summer of restrictions for Hungarians and events would have been cancelled due to the slow pace of vaccine procurement in Brussels, but because of the help of China and Russia Hungary was able to organize these events while other EU countries could not remove the restrictions. Critics of these events, who thought that the government should not have taken the health risk with these events, were blamed with anti-Christianity or being against the joys of “normal people” (football and hunting).

3.5.2 *The diabolic plan – danger discourses*

In these discourses the future of the EU is apocalyptic – this is the EU failure in future tense – and it is a consequence of an evil plan. Sometimes, it is only superficially related to the topic of the pandemic. Pandemic only serves as a gloomy background to start a lengthy jeremiad about the future of Europe and the world. It often starts with claiming that the European Union is facing dangerous times: pandemics and migration flows will determine the most important global political and economic developments. In that way the topic of pandemic and migration are interlinked, and it is a solid ground to start to string up the rest:

“The EU's role in the world economy, in industrial and technological innovation, is shrinking. The continent has been hit by a financial crisis, a migration crisis and then the coronavirus epidemic, while the Eurozone's foundations are cracking and the fiscal and public finance situation in the southern Member States is deplorable, not to mention demographic decline, one of the main causes of all the problems. First, the validity of Creation, the Christian parable, was questioned on the grounds of rationality and the fact that what the human mind cannot understand, measure or experience does not exist. Doubt about ancient truths has become the source of modern knowledge. After the trend to doubt God, came the spread of scepticism about the importance of nations, of the 'love of place': that our natural environment, our ancestors, their customs, our linguistic-cultural

tradition that derives from them, is a recent construction, a romantic fantasy that is now time to be left behind in the face of the global goals of an increasingly unified Humanity.” – (Szánthó 2021)

Sometime the danger is the EU itself when for example, the number of migrants arriving increases, and - according to the discourse - mandatory resettlement quotas are repeatedly brought up by NGOs and the Brussels bureaucracy. But even in these hard time, the Hungarian government resists and still does not agree with the plan for mandatory distribution. The childless western couples, which have given up having children of their own are also the part of the general danger, because their world is no longer biologically self-sustaining, so they must bring in people from outside – and with that, we are at the topic of dangerous migration. And in the extended discourses migrants mean health hazard because they spread the coronavirus. In these discourses there are also political forces, Brussels bureaucrats, left-wing liberal groups, NGO networks and media that are stirring up ideological conflicts that threaten to bring down the EU.

3.5.3 “In contrast, Hungary performs better”

In these flattering discourses Hungary is months ahead of Europe in terms of vaccination or re-opening. The success of the vaccination programme can also be largely attributed to the government's timely recognition, before the misguided purchase of the vaccine from Brussels, that it should not rely only on the European Union, but also open to the East. From the Autumn 2021 the Hungarian economy has been regarded as already outperforming its pre-pandemic level, while most EU countries have yet to do so. Selected statistics were quoted to show how Hungarian people were satisfied compared with less happy EU counterparts. In the success reports the suitable indicators were chosen carefully: the number of Covid death or the excess number of deaths per 100,000 were mentioned only in the periods when it was better than the EU average, or the Central-European average, or the Visegrad countries' average.

There were discourses praising the “wise decision” on the part of the Hungarian government to place the hospitals under military administration, reporting with appreciation on “calm governance” contributed significantly to the smooth implementation of restrictions and the subsequent restart of the economy in Hungary. The Hungarian state “went to war” and saved the country: thanks to this that we have not seen images such as those from Bergamo, Portugal or Romania – claims these discourses.

3.5.4 “The EU is selfish and betrays its own values” discourses

Reports on demonstrations against pandemic measures in the EU often concluded that despite the reportedly brutal dispersal of the demonstration there were no international repercussions, which regarded as an example of applying double standard and this way betrayal of basic values. The major example of the alleged betrayal of the basic EU values which related to the pandemic is the case of the non- accepted Recovery and Resilience Plan of Hungary (European Commission 2021). Hungary submitted its recovery plan on 12th May 2021. According to the general rule if had not been any obstacles Hungary would have got the fund by now. But because of the unsolved problems in the plan, which were: strengthening the anti-corruption framework, including by improving prosecutorial efforts and access to public information, the negotiations were prolonged and has not been finalized until now. The Commission says that EU funds to Hungary are withheld due to need to strengthen anti-corruption framework. At the same time Hungarian government

and Fidesz, the governing party claim that the EU Commission is acting according to its political biases. They accuse the Commission of judging on political bases because after the Hungarian parliament passed amendments to its child protection law in June 2021, which European Union institutions said was discriminatory against LGBTQ people, the negotiations on Hungarian Recovery Plan was prolonged. The two events (the condemnation of the so-called Child Protection Act in the EU Parliament - because of its homophobic nature and because it conflates homosexuality with paedophilia - and the rejection of the recovery plan) were linked in the discourses of political actors, according to their interests. As of June 2021, the EU-critical discourse, while still starting from the Covid crisis, as the recovery fund is intended to mitigate the damage caused by it, has grown into an independent discourse, with EU critique at its core. According to this discourse, the EU is biased (it has already granted the fund to other countries), persecuting, and punishing Hungary (for not participating in the LGBTQ canon) and thus interfering in its internal affairs and violating Hungary's sovereignty. This discourse allows the silencing in public spaces and in the media of the fundamental objection that has been raised about the lack of guarantees against corruption in the Hungarian recovery plan.

3.5.5 "Russia and China perform better – they are good" discourses

These are the discourses very often intertwined with "Hungary performs better". Without the Eastern vaccines and timely government decisions Hungary would not have been able to perform better and save the people. The Russian and Chinese vaccines which were imported into the country made Hungarians among the first to have access to the life-saving vaccine. Concerning China there were descriptions on the Eastern world where new state and digital giants are rising, economic and military centres are gradually shifting eastwards. This picture was contrasted with the neo-Marxist-inflated liberalism which is waging a (self-)murderous war against its own home, Western civilisation. As it already has been mentioned in the introduction section there were problems with the effectiveness of the Chinese vaccine among elderly people. From the time it turned out, these discourses faded.

3.5.6 "The EU is exploiting the crisis to advance its own interest" discourses

These discourses were very rare, reference to business consideration were embedded in a wider power context where the – otherwise rational – centralisation of the procurement of protective equipment and other equipment will increase the value of the commission. Because of that the Member States become devalued, and some Member States have been badly off in the distribution of vaccines. In that way Brussels wants to use epidemic management to increase its power under the guise of the Health Union. Nevertheless, the issue of pandemic management together with other health issues belonged to member state level in the EU.

3.6 Discussion

Hungary can be categorized by highly polarized political and media landscapes. This is clearly reflected in the analysis of media discourses on the EU management of Covid-19 crisis. Our analysis suggests that the Hungarian pro-government media outlets embraced all the disinformation narratives propagated by Russia and China and the four narratives detected by EUvsDisinfo. The European integration project is at the heart of the political polarization in Hungary. Orbán's rule of Hungary has been marked with defiance and criticism of the EU, its institutions, and its values (Bayer 2020). The clash with the EU is

often structured around identity-based arguments, which tend to challenge the values of the EU. Challenging the liberal democratic governance fostered by the EU is exemplified in an article published by Orbán himself in Hungary's conservative newspaper *Magyar Nemzet*, where he wrote that "The doctrine that 'democracy can only be liberal' — that golden calf, that monumental fetish — has been toppled" (Orbán 2021). This antagonism culminated with Orbán launching public campaigns against EU institutions, such as the 'Defend Hungary' campaign launched in 2018 against a European Parliament resolution that raised concerns about systemic rule of law problems in Hungary (Bayer and La Baume 2018). Or a 2019 a billboard campaign funded by Hungarian taxpayers, accusing the then President of the European Commission Jean-Claude Juncker and the Hungarian-American businessman George Soros, of pushing migration plans that pose a threat to Hungary's national security (Bayer 2020).

While political polarization over the EU is present in other EU countries, it remains exceptionally visible in the Hungarian media. This could be explained by the governmental control of the media. The election of Orbán had a detrimental impact on the media landscape in Hungary. The second Orbán government approved a series of amendments to the country's media laws to control the media landscape in the country. These amendments included a law to set up the National Media and Info-communications Authority (NMHH) and the Media Council, responsible for regulating the Hungarian media market, including media acquisitions. The Media Council, controlled by members loyal to the ruling Fidesz party, allowed the expansion of pro-government oligarchs in the Hungarian media sector, who use their media outlets into government mouthpieces. Likewise, the public media was also taken over by Fidesz loyalists. Today, the Hungarian ruling party has a massive number of media outlets under its direct or indirect control, and a propaganda machine.

The Hungarian government-controlled media itself become directly involved in the dissemination and production of disinformation against the EU. There is no need for organized Russian disinformation campaigns since the pro-government media, especially public service media perform this function. Such media outlets spread pro-Kremlin narratives. According to the Oxford internet Institute "Pro-government disinformation matches Kremlin narratives without any direct influence from Russia" (Bradshaw and Howard 2018, 29). This is not limited to Russian-friendly messages, but it also includes attempts to portray the EU as weak and unviable, hence undermining trust in the EU institutions in general (Chatterjee and Krekó 2020). It is not surprising, then, that the narratives detected by EUvDisinfo we embraced in the pro-government Hungarian media. It should be emphasized that home-grown disinformation can be much more effective since local governments have more information on their own population's preferences and needs (Szicherle and Krekó 2021). However, it is important to highlight that our study did not focus on social media. In social media, disinformation narratives do not need a local interlocutor to reach local audiences.

4 CONCLUDING REMARKS

In this paper we intended to investigate the variants of Covid-related anti-EU disinformation in Hungary and how these have reinforced institutional changes towards autocratization. To this purpose we conducted discourse analysis of six online sources (TVs and newspapers) on the period between July 2021 and

February 2022 and linked them to the institutional context of the country. Populism is present in Hungary in opposition and in government as well. The anti-establishment rhetoric of populism in opposition is a breeding ground of epistemic distrust. Although it appears in politics –in the Hungarian *Mi Hazánk*– it leaves little trace in mainstream media as its main field is social media. Once in power populists need to modify anti-establishment rhetoric. After Fidesz came to power in Hungary with two-third majority in 2010, PM Orbán's explicit aim was to establish an illiberal regime and proclaimed the policy of opening toward the East. Central to this ideology was to fight against threatening external forces, multinationals, migrants, and the EU. They changed the constitution, the election law and media law, gaining significant media dominance. Brussels became the target of a blame game, and this has been strongly reflected in Covid-related discourses. In this the PM criticised not so much the selfishness, but the inertia of the EU, embedded in the declining West narrative, contrasted with Russian and Chinese accomplishments and efficiency.

The state of institutions and elites of Hungary can explain the situation. The media is polarized in many countries, but in the Hungarian case this polarization is dangerously asymmetric in terms of resources, and democratic institutions are severely weakened. Political elites are in ideologically based fierce competition, and they do not seem to agree on the rules either. The EU is a negative, dividing point between federalist and sovereigntist positions in the Hungarian scene, where the governing elite's hard sovereigntist discourse prevails. Most of the population in Hungary is committed pro-EU, so there are obvious limitations of EU-criticism on behalf of domestic elites. This was especially true before the 2022 elections, so the strong EU-criticism on behalf of the Hungarian government turned into a pragmatic sovereigntist position in the second half of the period under review. The relative strength of propaganda and disinformation is also shown by the results on the degree of institutional trust. Between 2019 and 2021, trust in Hungarian institutions (parliament, government, politicians) decreased in Hungary (by 6-8%), while the initially higher (62%) trust in the European Commission remained unchanged in the years of the Covid epidemic (Kukovič 2022). When the topic of the epidemic was suppressed by the war that the Russian president started against Ukraine, the combat-rhetoric of the Hungarian PM was immediately ceased. Governance by decree and the use of Russian disinformation sources are now part of the peace rhetoric that offers protection against the threat of war.

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COVID-19 KOT ORODJE ZA DEMOKRATIČNE INSTITUCIJE IN VREDNOTE: PRIMER MADŽARSKE

Epidemija Covida19 na Madžarskem je prispevala k zatonu demokracije na dva načina. Neposredni učinek je bila razglasitev izrednih razmer s strani vlade in prehod na vladanje z dekreti (od pomladi 2020 do zdaj, najprej v zvezi z epidemijo, nato kasneje v povezavi z vojno v Ukrajini). Posredni učinek je bil širjenje dezinformacij o EU in domači politični opoziciji v kontekstu epidemije. Dezinformacije spodkopavajo zaupanje javnosti v institucije, vključno s samimi mediji, in predstavljajo grožnjo demokratičnim vrednotam in političnim procesom. Članek na podlagi podatkov iz mednarodnih empiričnih raziskav prikazuje proces zloma demokracije in spremljajočih legitimacijskih medijskih diskurzov.

Ključne besede: Covid-19; dezinformacije; mediji; EU; polarizacija; populizem.



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