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Current Populism in Europe: Gender-Backlash and Counter-strategies

Martin Mejstřík, Vladimír Handl (eds.)



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Commissioned by Heinrich-Böll-Stiftung e.V., Prague Office.

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Publisher: Heinrich-Böll-Stiftung e.V., Prague Office

English proofreading: Bradley McGregor

Technical editor: Antonín Handl

Layout and graphics: Kateřina Kubánková

Cover picture: Kateřina Kubánková

First print, 2021. Prague, Czech Republic.

ISBN (print): 978-80-88289-25-8

ISBN (online): 978-80-88289-26-5

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PREFACE

In recent years, populism has become a widely used term throughout Europe and the West in general. It does not refer to a new phenomenon, but the remarkable rise of populist actors in the last couple of years has given it fresh energy. With each passing national election, we observe deepening polarization of societies in almost every European country. It goes hand in hand with persisting social inequalities and insecurities, the erosion of the rule of law, identity conflicts and the struggle to interpret both today's world and the past. In order to strengthen and protect principles of liberal democracy that have been steadily endangered by illiberal populist movements, we must try to understand the motivations and worries of their supporters, broaden our knowledge about the nature and strategies of populist actors and find meaningful paths for overcoming the threats of populism.

Hence, the goal of the Heinrich Böll Foundation Prague is to explore populism from various new conceptual, empirical and methodological perspectives and offer ideas on how to combat the democratic decline in today's world.

The idea to create a book on populism in Europe came out of a need to follow up on the five previous editions of the Prague Populism Conference that had been organized since 2015 by the Heinrich Böll Foundation Prague, the Institute of International Studies of Charles University and the Goethe-Institut in Prague in order to support academic dialogue on populism and provide the expert public with new research findings. However, when preparing the conference's sixth edition, the whole world was struck by the COVID-19 pandemic. It thwarted plans to continue the intellectual exchange among scholars from all over Europe in person. Nevertheless, we decided to use the broad network of scholars which had been established over the years and offer you insight into contemporary research via a collection of seven innovative papers most of which should have been originally presented at the conference.

Thus, we are glad to present to you the book *Current Populism in Europe: Gender-Backlash and Counter-strategies*. While defining the topics for this year's call for papers, we took one of the core values of the Heinrich Böll Foundation – feminism and gender democracy – into particular consideration. Developments in many countries show that we are facing a surge in anti-gender rhetoric. Typically originating on the right and far-right end of the political spectrum, this rhetoric uses gender issues to exploit cultural conflict and promote and legitimize nationalist agendas. Therefore, it is highly relevant to address these developments as they undermine the struggles for gender equality and thus jeopardize democracy. There are three studies dedicated to gender topics in the book: two of them with a geographical focus on Poland and Hungary, respectively, where we consider the latest developments as very serious. Both studies examine the government's politics undermining woman's rights and analyse the dismantling of liberal democratic principles.

Additionally, we present to you a set of revealing, up-to-date studies. One chapter discusses populist communication strategies in relation to the current pandemic through the example of Italian political communication on social media. Another study introduces new research results on the emergence and consolidation of the relatively young, Spanish, radical-right party VOX. Finally, the innovative concept of democratic efficacy as well as a theoretical deliberation on the cause and retort of populism are presented in the publication.

We would like to extend our sincere gratitude to both editors of the book, our close and reliable partners from Charles University Vladimír Handl and Martin Mejstřík, and all the scholars who present their research findings here. The recent months have put all of us under extreme pressure, and we

truly appreciate the efforts of everyone who has contributed to creating this publication under such demanding circumstances. Although we succeeded in emphasizing gender-related issues within the book itself, regrettably, we did not manage to ensure a gender-balanced composition in the group of authors. Since we redirected our efforts towards the compilation of this publication only in late spring 2020, both considerable time pressure and the persisting gender inequalities in academia, further deepened by the impact of the pandemic, could be seen as the main reasons for having only one female author.

We hope that this publication will give the theorists and practitioners a more in-depth insight into the complex picture of populism and will inspire further debate on the counter-strategies in Europe.

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INTRODUCTION

Martin Mejstřík and Vladimír Handl

Populism is generally perceived as a negative political phenomenon. However, we need to be careful and distinguish between parties and movements which are exclusively populist and those which are not. We can define non-exclusive populism as the occasional populist style of parties which are not fundamentally populist and represent “traditional” political ideologies or doctrines. For exclusively populist parties or movements, populism is the essence of their existence and of all their activities. This exclusive populism is illiberal, anti-democratic, anti-gender and epitomizes a negative political phenomenon. The non-exclusive populism of non-populist parties is not necessarily something we need to worry about. There is also not much which can be about it since non-exclusive populism is an ordinary part of politics. As we argue in the book, focus should be on exclusively populist politicians and their parties and movements (such as Fidesz, Law and Order, or the Northern League).

Contemporary populism is strongly connected to the concept of democracy through its emphasis on the sovereignty of the people and the principle of majority, to the extent that we can state that where democracy exists, so does populism.¹ For many years, populism was seen in a positive light as a “condition of politics”², having its root in democracy and supporting the sovereignty of the people and the principle of majority.³ Contemporary authors in the theoretical field still see populism as democratic in principle⁴ but, at the same time, hostile towards liberal democracy.⁵ According to Mudde, populism does not have a negative relationship with representative democracy either,⁶ but it is against representation by elites and, therefore, looks with suspicion at liberal democratic regimes.⁷ This scepticism is based on internal tensions in liberal democracies between promises for the rule of majority and the reality of protecting minority rights.⁸ It means that we can find populism clearly sided with the “silent majority” against pluralism and the protection of minorities.

1 Frank Decker, “The Populist Challenge to Liberal Democracy,” *Berliner* (2003).

2 Ernesto Laclau, *On Populist Reason* (New York: Verso, 2005), 154.

3 Cas Mudde and Cristóbal Rovira Kaltwasser. *Populism in Europe and the Americas: Threat Or Corrective for Democracy?* (Cambridge: Cambridge University Press, 2012), 17.

4 Margaret Canovan, “Trust the People! Populism and the Two Faces of Democracy,” *Political Studies* 47, no. 1 (1999): 2–16; Laclau, *On Populist*.

5 Cas Mudde, *Populist Radical Right Parties in Europe* (New York: Cambridge University Press, 2007); Guillermo O’Donnell, “Delegative Democracy,” *Journal of Democracy* 5, no. 1 (1994): 55–69.

6 An opinion which has been rejected by several other authors. See Paul Taggart, “Populism and the Pathology of Representative Politics,” in *Democracies and the Populist Challenge*, ed. Yves Mény and Yves Surel (New York: Palgrave Macmillan, 2002), 62–79; Gianfranco Pasquino, “Populism and Democracy,” in *Twenty-First Century Populism. The Spectre of Western European Democracy*, ed. Danielle Albertazzi and Duncan McDonnell (New York: Palgrave Macmillan, 2008), 15–29.

7 Cas Mudde, “The Populist Zeitgeist,” *Government and Opposition* 39, no. 4 (2004): 542–563; Mudde, *Populist Radical*.

8 Canovan, “Trust;” Yves Mény and Yves Surel (eds.), *Democracies and the Populist Challenge* (New York: Palgrave Macmillan, 2002).

Additionally, Pappas sees populism as the complete opposite of political liberalism based on three interrelated characteristics: the idea that society is split along a single cleavage (good “people” versus “bad” elites), the promotion of polarizing and adversarial politics, and adherence to the principle of majority.⁹ To put it simply, the principle of political liberalism is that voters have the right to control politicians, whilst the populist’s idea is that politicians must serve their voters.

A different problem is that most of the current studies about populism are normative and lack empirical data.¹⁰ Some authors have criticized the lack of a universal theory which could explain the successful story of populism and allow for the construction of a party family. The first approach sees populism as a specific type of political movement similar to fascism, with its extreme mobilization of the masses. Germani¹¹ later added the factors of populism’s multi-class impact and the key role of a charismatic leader. He mainly studied Latin American regimes and was clearly inspired by the “people’s populism” of Juan Domingo Perón in Argentina and Getulio Vargas in Brazil.¹²

The second method defines populism as a political style forming the relationship between a leader who is acting on the basis of polls and surveys and his “people” with the aim of conquering political power.¹³ According to Pierre-André Taguieff¹⁴, populist leaders set their own political discourse and action based on a contradiction between the people and the elites. However, this approach has two flaws. First, it is too broad and, in general, the use of surveys and political pragmatism could hardly be attributed only to populism.¹⁵ Second, it confuses populism with demagogy; nowadays, we would have to call every politician a populist during an electoral campaign.¹⁶

The third approach, called the “discursive definition”, understands populism as a way of thinking, a type of mentality, political logic and mental construct.¹⁷ Laclau saw populism as part of the struggle for hegemony over the means of production (“the people” against “the power bloc”). There are three stages in the consolidation of populism: the setting of different demands, the formation of collective identity and definition of the enemy, and the emergence of a leader and his or her “people”.¹⁸ This

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- 9 Takis S. Pappas, “Populist Democracies: Post-Authoritarian Greece and Post-Communist Hungary,” *Government and Opposition* 49, no. 1 (2013): 3.
- 10 Danielle Albertazzi and Duncan McDonnell, *Twenty-First Century Populism. The Spectre of Western European Democracy* (New York: Palgrave Macmillan, 2008); Mény and Surel, *Democracies*; Francisco Panizza, “Introduction: Populism and the Mirror of Democracy,” in *Populism and the Mirror of Democracy*, ed. Francisco Panizza (New York: Verso, 2005), 1–31.
- 11 Gino Germani, *Authoritarianism, Fascism, and National Populism* (New Brunswick: Transaction Books, 1978).
- 12 Multi-class impact as a key characteristic of populism is highly questionable because it is one of the most typical attributes of a catch-all party according to Otto Kirchheimer, “The Transformation of the Western European Party Systems” in *Political Parties and Political Development*, ed. Joseph LaPalombara and Myron Weiner (Princeton: Princeton University Press, 1966), 178–212.
- 13 Peter Mair, “Populist Democracy vs. Party Democracy,” in Mény and Surel, *Democracies*, 84.
- 14 Pierre-André Taguieff, “Political Science Confronts Populism: From a Conceptual Mirage to a Real Problem,” *Telos* 1995, no. 103 (1995): 9–44.
- 15 Kurt Weyland, “Clarifying a Contested Concept. Populism in the Study of Latin American Politics,” *Comparative Politics* 34, no. 1 (2001): 12.
- 16 Mudde, “The Populist Zeitgeist,” 543.
- 17 Ernesto Laclau, *Politics and Ideology in Marxist Theory. Capitalism – Fascism – Populism* (London – New York: Verso, 1979); Laclau, *On Populist*; Ernesto Laclau, “Populism: What’s in a Name,” in *Populism and the Mirror of Democracy*, ed. Francisco Panizza (New York: Verso, 2005), 32–49.
- 18 Rasmus Kleis Nielsen, “Hegemony, Radical Democracy, Populism,” *Distinktion: Scandinavian Journal of Social Theory* 7, no. 2 (2006): 77–97.

approach is criticized for its extreme abstraction, vagueness, internal heterogeneity and low empirical validity.¹⁹

The most widespread approach towards populism abandons the construction of a general theory of populism and instead focuses on populism as an ideology where the “good” sovereign people struggles against the “corrupted” elites who want to deprive the people of their political rights.²⁰ This definition does not represent a fully coherent ideology; instead, it could be understood as “thin-centred” ideology²¹ focusing on certain aspects of social and political life with emphasis on political action and mobilization.²² The problem with using the concept of ideology for the definition of populism lies in the fact that populist politicians do not usually create comprehensive political visions²³ and instead form a disparate group of political doctrines and programmes. As Pasquino stated, given the shaky and fluid structure of various ideologies and the discrepancies among them, it would be better in the case of populism not to use the notion of ideology but to speak about mentalities.²⁴ Pasquino was inspired by the similar use of this designation by Juan Linz²⁵ in his famous definition of authoritarian regimes.

However, as Cas Mudde and Cristóbal Rovira Kaltwasser noted, in the current conceptualization of populism, it is necessary as a first step to construct a minimal definition of the term.²⁶ The result is a linguistically precise and very specific definition usually valid only for a unique concept. This is useful when we want to have accurate conclusions and the possibility to prepare a classification based on the examination of individual cases. The minimal definition according to Cas Mudde tells us that populism is “an ideology that considers society to be ultimately separated into two homogenous and antagonistic groups, ‘the pure people’ versus ‘the corrupt elite’, and which argues that politics should be an expression of the *volonte general* of the people”.²⁷ In other words, populism is based on an anti-elitist approach and emphasizes in society a constant moral struggle between the “people” and the “establishment” in the classic Us versus Them dialectic.²⁸ It could be said that populism is neither a threat to nor a corrective for current liberal democratic regimes, but it is more a set of ideas following democracy like a shadow.²⁹ Put simply, populism is not external to democracy but one of the possible developments that occur when the elites ignore the people.

But what strategy should we choose and use regarding exclusively populist parties? Let us start negatively; in other words, let us say first what we should not do. Populists cannot be defeated by attacking them as dangerous for democracy, not smart enough or generally bad people. Populists cannot be defeated by pushing them to the edge of the political system of the country or by excluding them

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- 19 Nicos Mouzelis, “Ideology and Class Politics: A Critique of Ernesto Laclau,” *New Left Review* 112, no. 1 (1978): 45–61; Yannis Stavrakakis, “Antinomies of formalism: Laclau’s theory of populism and the lessons from religious populism in Greece,” *Journal of Political Ideologies* 9, no. 3 (2004): 253–267.
- 20 Margaret Canovan, “Taking Politics to the People: Populism as the Ideology of Democracy,” in *Democracies and the Populist Challenge*, ed. Yves Mény, Yves Surel (New York: Palgrave Macmillan), 25–44; Mudde, *Populist Radical*.
- 21 Mudde, “The Populist Zeitgeist,” 544.
- 22 Michael Freedon, *Ideologies and Political Theories: A Conceptual Approach* (Oxford: Clarendon Press, 1996), 77.
- 23 Hans-Georg Betz, *Radical Right-Wing Populism in Western Europe* (New York: St. Martin Press, 1994), 107.
- 24 Pasquino, “Populism and Democracy,” 20.
- 25 Juan Linz, *Totalitarian and Authoritarian Regimes* (Boulder: Lynne Rienner, 2000).
- 26 Cas Mudde and Cristóbal Rovira Kaltwasser, “Populism and (liberal) democracy: a framework for analysis,” in *Populism in Europe and the Americas: Threat or Corrective for Democracy?* ed. Cas Mudde and Cristóbal Rovira Kaltwasser (Cambridge: Cambridge University Press, 2012), 10.
- 27 Mudde, *Populist Radical*, 23; Mudde, “The Populist Zeitgeist,” 544.
- 28 Margaret Canovan, *Populism* (London: Houghton Mifflin, 1981), 294.
- 29 Canovan, „Trust;“ Benjamin Ardití, “Populism as a Spectre of Democracy: A Response to Canovan,” *Political Studies* 52, no. 1 (2004): 135–143.

from the other “decent” part of the party system, labelling them “extremists”, “anti-democrats”, “fascists” and the like. By the same token, supporters and voters of populist parties should not be labelled “a mob”, “fools”, “rabble” and so on. Populism will not be defeated by merely defending the status quo, ignoring problems either real or perceived, albeit without much substance. The fact that many issues are captured by populists does not make the public (or popular) fear surrounding these issues less authentic. The migration crisis in countries not hit by any migration is an example that underlines our argument here. The fact that there has been no increase in the number of asylum-seekers, and certainly not from Muslim countries, does not make people less afraid of migration as such. Rather, it “requires system-wide transformations, alternative paradigms, and new narratives to combat the systemic roots of populism”.³⁰

The only effective way to fight populism is positively offering solutions to real problems and patiently explaining that some things are not based on real facts, that they are artificially used and exaggerated by those who do not have any real answers to any of the twenty-first century’s challenges. In short, we need to start a dialogue with populist actors and their supporters, a dialogue which is of course difficult and requires important skills that go beyond the simple implementation of policy recommendations and beyond the current status quo in political decision-making. We believe that the response to populism should include two levels – institutional and behavioural – within the details of democratic political system efficiency, the effectiveness of democracy, the rule of law and independent media. This analysis, however, goes beyond the scope of this publication.

In this book, we analyse exclusively populist leaders and their specific approach to gender issues. Ronald Car, in his chapter “Gender Equality: A Task for Militant Democracy, Not for Culture Wars?”, offers a critical evaluation of the often-used metaphor of “culture war” and, primarily, the fact that this notion allows current liberal democracies to avoid serious involvement in an entire dimension of today’s political conflict. Instead, he invokes Karl Loewenstein’s notion of militant democracy, which encourages liberal and democratic regimes to strengthen their defences and expand them into spheres which they tend to overlook.

Due to their reliance on the public/private divide, liberal-democratic regimes have seemed unable to cope with the notion of culture wars as fields of political struggle. Issues related to gender equality, care work and so forth have therefore long been neglected by the liberal democratic regimes, which have tended to contain them within the “private” sphere. The populist movements, far more prone to politicizing various spheres of life and identity, have successfully pushed against gender equality in increasingly illiberal, but formally democratic states and also in thoroughly established democracies. The rift between populist politics and liberal democracy may not be as deep as a liberal democrat might hope. It is, the author believes, indeed wrong to view populists as on the margins of democratic politics and generally shared values and attitudes, and he quotes Cas Mudde’s depiction of the radical populist right as an articulation of “pathological normalcy”. Populist politics may take different forms, and many are far from the well-known (ostensibly) anti-democratic realms that we have managed to keep at the margins of the public debate.

An important point that Car makes is that for “entrepreneurs of populist politics”, using rhetoric against gender equality or gender-related topics in general is a winning strategy in terms of cost and benefits, and such tendencies are therefore common not only in the ranks of the populist (Far) Right. In order to fight this threat, our democracies should implement certain militant features to make such strategies or tactics far more costly.

30 Félix Blanc, Hanno Burmester, Elena Marcela Coman, Filipe Henriques, Sophie Pornschlegel, Julian Rappold, Judith Rohde-Liebenau, Nuno Vaz Silva, “Thinking Lab on Populism: Policy Brief” (Das Progressive Zentrum, March 2018), 2, <http://dialogue-on-europe.eu/wp-content/uploads/sites/7/2018/03/das-progressive-zentrum-dialogue-on-europe-populism-recommendations-policy-brief.pdf>.

The militant element of our democracies has been quite efficient in mitigating threats against the constitutional and institutional make-up of the systems or of liberal democratic institutions; hence why the prohibition of certain political organizations and a degree of censorship are rather common in European democracies. But, in order to apply this to issues such as gender equality, one must fight not only for its institutions but also for the value of equality and to become involved in deliberative processes. The latter may seem problematic but proves to be necessary, since populists often use various deliberative methods to undermine the dignity of various groups of people without resorting to outright "taboo" rhetoric or conduct currently punishable by law.

Car provides a valid example of subtle political techniques as employed by Italy's Matteo Salvini, on the one hand keeping the façade of more or less liberal and inclusive means of deliberation while undermining its various facets in the process on the other. The author concludes that we simply cannot succumb to the notion of "culture war" as a phenomenon outside the political sphere, since such wars are, in the end, wars for democracy as such.

In the second chapter, "Make Misogyny Great Again: 'Anti-gender' Politics in Poland", Anna Grudzinska seeks to explain the relationship between so-called "anti-gender" politics and the rise of the authoritarian state. Her argument is that not all far-right or right-wing parties challenge gender equality. Moreover, populism in itself does not have inherently gendered structures; it does, however, when it promulgates right-wing or far-right ideologies. The Polish case demonstrates how "populist nationalism" becomes a tool used to suppress not only women's rights but also constitutional democracy as such.

She rejects the term "illiberal democracy" since it is a camouflage for authoritarianism. Still, she does turn to the notion of illiberalism as an analytical tool, proposing "to define 'illiberalism' as support for the maintenance of social hierarchies which are endorsed by authorities (legally or otherwise) and enjoy recognition within society".

Mobilization against the equality of men and women (labelled as a "gender ideology" and depicted as inherently Marxist and destructive) or against the LGBT community is an important part of the "illiberal revolution" in Poland. In this organic concept of the nation, the role of women is primarily reproductive. The project of a Fourth Republic seeks a "new start" for the Polish nation and presupposes the adoption of a new social contract based on Catholic norms and values.

The author provides the historical and political context of this development: The political ideas of Jaroslaw Kaczyński and the Law and Justice party were inspired by the political theories of Roman Dmowski, one of the "founding fathers" of the Polish state in the twentieth century; theories based on social Darwinism; and those of national egoism. The post-war communist regime created its own version of "communist nationalism". Referring to Małgorzata Fidelis, the author argues that communist gender equality meant to define social hierarchies rather than equality and was both illiberal in its nature and close to the Catholic Church mainly in terms of reproductive rights.

The current conflict between illiberalism and liberalism in Poland was made especially prominent by the right-wing opposition's struggle against the Istanbul Convention, portrayed by its Polish critics as a Trojan horse which could introduce gender equality into national legislation. Primarily though, the document was rejected as it presupposes the de facto elimination of social hierarchies. Poland is witnessing a deadly struggle over different visions of state and society, and "women's rights are the key to this entanglement". Referring to Naomi Klein, the author argues what needs to be done is "to encourage the very worldview the authoritarians try to suppress".

In his chapter "In the Name of the Family: The Populist Turn Against Gender in Hungary", Robert Sata focuses on gender issues in Hungarian policies. He shows how there, as in Poland, an illiberal state turns against human rights and redefines the role of women in society. While Viktor Orbán has remained cautious enough not to attack women's rights directly, he has made them a crucial part of his strive for a nativist, conservative reconstruction of Hungary. In the heavily family-centric rhetoric of the Fidesz government, "women's role is limited to the nation's biological reproduction". And, in a similar manner to Poland, the "dismantling of gender equality went hand in hand with the dismantling of democratic institutions". Reconstructing the historical context of current Hungarian gender poli-

cies, the author points to a conservative, nineteenth century tradition in Hungarian society and also uncovers the conservative nature of the communist regime before 1989: He contends that the “patriarchal society was left unchallenged even in socialism”. After Hungary joined the European Union, positive developments in gender equality did not come without problems, and gender mainstreaming remained weakly institutionalized. With chauvinism and xenophobia common among ordinary Hungarians, the author argues that the “foundations upon which Orbán built his illiberal politics had been present long before 2010”.

While analysing the conservative discursive turn in the speeches of Viktor Orbán during the 2010–14 and 2014–18 periods, the author employs both a quantitative content analysis and a qualitative frame analysis. He maintains that Orbán’s speech acts rest on “othering” and on a rhetoric of fear, danger and insecurity. During the first period, the economic crisis and the demographic downturn were at the centre of the speech acts. Dealing with these issues was presented as a struggle for the survival of Hungary, the emphasis being on nationalism and religion. The return to conservative Christian morality impacted gender equality, and women were presented only as mothers/grandmothers.

Viktor Orbán’s discourse in 2014–18 displayed a further turn towards right-wing populism, xenophobic positions and nationalism. In the context of the refugee crisis, Orbán emphasized the need to protect Hungarian women against refugees while de facto perceiving women as “solely baby-producing machines”. The discourse replaced “gender mainstreaming” with “family mainstreaming”. Robert Sata contends that Orbán’s populist rejection of liberal democracy has thus resulted in “a discourse of social and religious conservatism from the nineteenth century that . . . makes possible state-sponsored anti-gender mobilization and anti-feminism”.

“VOX and the Emergence of the Populist Radical Right in Spain” by Andrés Santana is the last of the case study–based chapters, in this instance focusing on the relatively new populist radical right party (VOX) in Spain. The party has recently enjoyed considerable success at the ballot box and entered both chambers of the Spanish parliament, as well as local representative bodies and the European Parliament. This right-wing twist on “the long march through the institutions” has not been directly powered by the devastating effects of the 2008 Great Recession, which saw a steep decline among traditional political parties in Spain and elsewhere, an effect that has been observed all around Europe. While the Left benefited from the recession, which proved particularly prominent in the Spanish case, the effect was only short-lived, and, later, particularly after 2017, the populist Right managed to take over the momentum. The chapter contrasts the slow build-up of VOX with the downfall of the once dominant forces of the Spanish Socialist Party and the traditional, conservative Popular Party, which manifested itself in 2015 in what was described as an electoral earthquake. The factor specific to the Spanish case is the territorial issue: The Basque and – more prominently – the Catalan nationalist leaders escalated the pressure on the central government to the brink of separatist rebellion. Thus, they created a specific crisis that VOX managed to exploit, posing itself as the defender of the state, promoting a firm line and advocating harsh measures against the Basque and Catalan separatists. The previously marginal VOX thereby managed to reinforce its position on the back of Spanish (centralist) nationalism defined as against local nationalism.

The second part of the book is dedicated to analysing populist attitudes and policies and measuring their efficacy. In the chapter “Democratic Efficacy and Populist Attitudes: A Conceptual and Empirical Exploration”, Márton Bene and Zsolt Boda seek to develop an analytical tool which could help us to better understand the challenges of populism and identify correct strategies for dealing with the phenomenon. While discussing political efficacy, they acknowledge that it represents an important motivational background for political participation. At the same time, they point out that it says nothing about democratic quality. In order to broaden the analytical scope of political efficacy, they integrate democratic criteria into the concept.

Political efficacy, a feeling that individual political action can influence the political process, has both an internal and an external dimension. Internal political efficacy (IPE) refers to the belief of individuals that they have the capability to participate in politics, whereas external political efficacy (EPE) refers to “public perceptions of governmental institutional responsiveness”. The authors iden-

tify specific groups of people according to their level of political efficacy and argue that people who believe in the system (a high level of EPE), and not in their own ability to participate in the political process, tend towards paternalistic behaviour. Those who see their own ability as well developed but distrust the system tend towards scepticism.

The argument for the introduction of democratic criteria is that an ideal democracy “can only work if citizens have certain democratic capacities”, such as a certain level of factual political knowledge, the capability to reflectively consume news, non-intensive partisanship, strong identification with the core values of democracy and some involvement in political activities. While these democratic capacities are widespread, only one-fifth of respondents to the European Social Survey Round 8 (ESS8; ESS, 2016–17) have all of them.

By supplementing the concept of political efficacy with this democratic component, the authors seek to introduce a qualitative aspect to the original term and to conceptualize democratic efficacy as a two-dimensional concept. Using data from ESS8, they show that almost two-thirds of the respondents with a high level of political efficacy have incomplete democratic capacities. The authors conclude that this group might be more open to populism than people with both high political efficacy and complete democratic capacities. They analyse the ESS8 data regarding 15 countries and present a nuanced picture of populist attitudes of the public in those countries. Their research not only proves once again that populism is a complex phenomenon but, with the concept of democratic efficacy, they also offer an analytical tool which helps to better understand that complexity.

In the chapter “The COVID-19 Related Communication of Italian Politicians and Its Success on Facebook”, Arturo Bertero focuses on the dynamics found in the social media communication of Italian populist politicians during the 2020 spring phase of the COVID-19 pandemic in Italy. Providing careful data analysis and employing his knowledge of the media and communication channels in general, he shows that Italian populists managed to politicize what was fundamentally a health crisis and, therefore, perform extremely well on their social media platforms.

Focusing on populism as a style of political communication, the contribution provides insight into the complex field of media and, specifically, social networks, the way they spread content and the way their logic may inform the field of political communication. It proves that the second period of the pandemic’s first wave in Italy, that is, the lockdown period, marked a change both in the methods of communication and in the amount of attention that populists managed to attract. By successfully politicizing the pandemic, populists managed to perform far better than in the past and, crucially, better than the representatives of mainstream political discourse.

The author concludes that, while the dynamics of social networks are complex and it would be false to jump to conclusions based on the temporary performance of a Facebook profile, populists have managed to use the crisis to gather some degree of social capital that they may instrumentalize in ongoing and prospective political battles.

Finally, Andrej Školkay, with his chapter “The Cause and Retort of Populism: A Formal Political Reasoning (Politics) Without Distinct Ideology as a Response to a Political-Moral Crisis – Turning Laclau’s Theory into a Research Tool”, offers an extensive and very detailed overview of the theoretical work that has so far been done on the issue of populism and, through its meticulous critique, promotes an often ignored approach that might actually prove very useful in the study of populist politics. In his voyage through various empirical and ideational (or even ideological) approaches, traditional comparative methodology and so forth, he seeks an analysis-friendly “substance” of various instances of populist politics.

The theoretical study of populism contains a number of diversions and pitfalls. Scholarly efforts struggle with the concept’s ambiguity, various biases, normative distortions and, in general, the dangers that any scholar attempting to categorize such a complex phenomenon has no choice but to face. While praising the contributions of various theories, Školkay often points to their problematic features and does so in an extremely informative and thought-provoking manner.

Školkay’s preference for the deeper, political/moral dimension of populist politics (or populist logic) brings him back to the theoretical work of Ernesto Laclau. Highlighting the fact that populist movements

often emerge both in illiberal regimes and in regimes that could be characterized as (to some extent) liberal and democratic, he suggests we should speak of populist logic rather than a shared ideology: a logic based on the notion of crisis and its various moral/political implications and demands.

While Školkay emphasizes the problematic aspects of Laclau's theories, he promotes Laclau's concepts as extraordinarily helpful, highlighting the concept of crisis as both a feature of populist politics and a key political discourse in democratic societies experiencing a surge in this kind of politics. The true fuel of populist politics actually may not be any specific content and even less a charismatic leader, but rather the elements of crisis already present in mainstream discourse. Školkay confronts us with Laclau's somewhat provocative point that populist politics actually cannot be linked to any specific content or ideology. Rather they represent a particular logic, an empty signifier which embodies a variety of particular content. That is why we need, Školkay concludes, a certain form of situational analysis that would help us to examine the already-present deep roots of crisis that populist politics may build upon. Such an analytical approach would prove far more rewarding than focusing on particular aspects, demands or the charismatic leaders of specific movements when a struggle for power is taking place.

Gender Equality: A Task for Militant Democracy, Not for Culture Wars?

RONALD CAR

Introduction

Gender equality is a vital issue of democracy itself, not a culture war. “The culture war”, as Eugene Joseph Dionne Jr. wrote, “exploits our discontents. The task of politics is to heal them.”¹ We must “challenge the metaphor”² of culture wars if we wish to defend both gender equality and democracy. Culture wars are not “given” as inevitable consequences of cultural differences; they are constructed historically and socially.³ Political actors give rise to culture wars as a means of mobilization through the categorization of people into social groups. Not only do members of such groups perceive themselves as homogeneous, that is, they deem positive some similar characteristics, they also see non-members as a diversely homogeneous group typified by negative characteristics.

While culture wars are increasingly applied as a highly aggressive and disruptive electoral technique not only in the United States but also in the countries of the European Union, our liberal-democratic constitutional tradition still seems unable to confront them.⁴ This is mainly because liberal democracy obeys the private/public divide, and culture stands on the private side, beyond the reach of majoritarian decisions. After all, culture – especially if connected to religion – is by definition about deeply personal choices and values.⁵ Thus, according to conventional wisdom, if the state cannot govern my cultural choices, it cannot govern my culture wars either. Hence, we tend to believe that rules and procedures of representative democracy should apply only to public issue deliberations, whereas disputes about personal values are somehow sacred and thus above earthly laws. Put simply, culture warriors call for full deregulation of democratic debates involving personal values.

This way of thinking is the key strategic reason why populists mobilize their supporters in crusades against gender equality. As long as we fail to apply to gender whatever means we have to defend democracy, populists will use the self-styled culture war debate over gender politics as a Trojan horse

1 Eugene Joseph Dionne Jr., “Why the Culture War Is the Wrong War,” *The Atlantic*, January/February, 2006, <https://www.theatlantic.com/magazine/archive/2006/01/why-the-culture-war-is-the-wrong-war/304502/>.

2 Ibid.

3 The term “culture war” was first used by US sociologist James Davison Hunter in 1991 to describe a fundamental split between traditionalist and progressive views of morality. According to Hunter, cultural divide cuts across class, political, gender, ethnic or racial lines; see James Davison Hunter, *Culture Wars: The Struggle to Define America* (New York: Basic Books, 1991). “Culture war” became a journalistic staple in 1992 when Patrick Buchanan popularized the idea at the Republican National Convention as a “struggle for the soul of America”; see Irene Taviss Thomson, *Culture Wars and Enduring American Dilemmas* (Ann Arbor: University of Michigan Press, 2010), 4. For a thorough critique of the concept, see *Cultural Wars in American Politics: Critical Reviews of a Popular Myth*, ed., Rhys H. Williams (New York: De Gruyter, 1997).

4 For an introduction to the US-styled culture war approach in the politics of EU countries, with a specific focus on Italy, see Luca Ozzano, Alberta Giorgi, *European Culture War and the Italian Case: Which side are you on?* (New York: Routledge, 2015).

5 On the liberal reading of the “neutral-as-secular public sphere”, see Claudio Michelon, *The Public in Law: Representations of the Political in Legal Discourse* (Farnham: Ashgate, 2012), 134 et seq.

to disrupt not only the procedures of representative democracy but also the foundational values of an equal society. In Ulrich Preuss's famous words, democracy "depends for its success on the recognition of the other as equal, on reciprocity and the capacity for discursivity".⁶ Thus, by undermining the value of procedures, gender focused culture wars reduce the quality of the democratic discourse to a moralistic confrontation between Us and Them, friends and foes.⁷

At the same time, gender equality is vulnerable because of both its deliberative and egalitarian components. As regards the former, the quality of gender discourse depends on the extent to which reasoned dialogue prevails over emotional appeals.⁸ The latter reflects the impediments to the actual exercise of formal rights and liberties.⁹ Hence, by attacking gender politics, populism aims to reaffirm a hierarchical and authoritarian concept of society.

Gender as a Blind Spot of Militant Democracy

As explained by feminist theorists, issues related to dependency, sexuality and reproduction had long been neglected in democratic discourse precisely because of the already mentioned dichotomy between the public (political) and the private (cultural). The historically denied equality and autonomy have been granted only recently, and it remains a largely incomplete project.¹⁰ Several states are still today discussing full recognition of marital rape and domestic violence as criminal acts, and in countries with populist governments such as Hungary, the situation is deteriorating.¹¹ Women's right to control their body through abortion continues to be challenged and remains controversial.¹² Care work still does not fit into the public domain, which is predominantly based on contractual relations and autonomy. Moreover, it has been rightly observed that care work is provided through "global care chains" staffed by immigrant women who often lack formal citizenship status.¹³

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- 6 Ulrich K. Preuss, "Die empfindsame Demokratie," *Frankfurter Allgemeine Zeitung*, August 22, 2000, 51.
 - 7 Victor Orban's Hungary is a perfect example of the way populism uses culture wars to disrupt the quality of democracy; see Frank Furedi, *Populism and the European Culture Wars: The Conflict of Values between Hungary and the EU* (New York: Routledge, 2018).
 - 8 On the gender dynamics of dialogical politics, issues of consensus and decision-making, see Jude Browne, ed., *Dialogue, Politics and Gender* (Cambridge et al: Cambridge University Press, 2013).
 - 9 On the differential impact of constitutional provisions on women, even where these appear gender-neutral, see Helen Irving, *Gender and the Constitution: Equity and Agency in Comparative Constitutional Design* (Cambridge: Cambridge University Press, 2008).
 - 10 For an overall empirical analysis of gender policies in EU countries, see Rosalind Cavaghan, *Making Gender Equality Happen: Knowledge, Change and Resistance in EU Gender Mainstreaming* (New York–London: Routledge, 2017).
 - 11 Radically gendered opposition to domestic violence was not present in parliamentary debates in Hungary until the 2012 discussion on the criminalization of domestic violence. For a mapping of legal and policy reforms regarding domestic violence and a comparison of policy change over time in CEE countries, see Andrea Kriszán, Raluca Maria Popa, "Contesting gender equality in domestic-violence policy debates. Comparing three countries in Central and Eastern Europe," in *Varieties of Opposition to Gender Equality in Europe*, ed. Mieke Verloo (New York: Routledge, 2018), chap. 6.
 - 12 For an overview of abortion policies and the politics of reproductive rights across Europe, see Silvia De Zordo, Joanna Mishtal, Lorena Anton, *A Fragmented Landscape: Abortion Governance and Protest Logics in Europe* (New York–Oxford: Berghahn, 2017). More recent survey data about the birth control pill and the economic empowerment of women is available in Henning Finseraas, Øyvind Sjøraas Skorge, "'The Miracle Tablet Maybe': Legalization of the Pill and Women's Childbearing and Career Decisions," *Social Politics: International Studies in Gender, State & Society* 26, no. 2 (Summer 2019): 276–298.
 - 13 See Leti Volpp, "Feminist, Sexual, and Queer Citizenship," in *The Oxford Handbook of Citizenship*, eds. Ayelet Shachar, Rainer Bauböck, Irene Bloemraad, Maarten Vink (Oxford: Oxford University Press, 2017), 158 et seq. For a detailed comparison of care regimes, see Naomi Lightman, "Comparing Care Regimes: 'Worker Characteristics and Wage Penalties in the Global Care Chain,'" *Social Politics: International Studies in Gender, State & Society*, published online: 08 May 2020.

The recent surge of populist movements is threatening to undermine from within, through legitimate democratic procedures, the still fragile accomplishments in these areas.¹⁴ This is because political actors who mobilize their followers through anti-gender culture wars in today's Europe do so in societies where democratic ideals and principles appear widespread and gender equality gives the impression of being sufficiently rooted. Regardless of the many differences, the ideals of human rights and democracy prevail as a mainstream attitude not only among the citizens of the Western European "old democracies" but also in the "new democracies" of Central and Eastern Europe (CEE). As Cas Mudde fittingly put it, "Populist radical right ideas are not alien to the mainstream ideologies of western democracy. . . . In fact, the populist radical right is better perceived as a *pathological normalcy*. . . . It is well connected to mainstream ideas and much in tune with broadly shared attitudes and policy positions."¹⁵ Even in countries where democracy and the rule of law are currently under attack, the overwhelming majority of citizens do not want to be perceived as undemocratic. Unfortunately, at the same time, many of them seem to accept the flawed idea of democracy instilled by the populists.¹⁶

The anti-gender attitude of the populist parties is also often blurred and incoherent and, therefore, less visible. For example, the French National Rally (RN; Rassemblement National) traditionally opposed gay rights, and "it's highly peculiar to find anything in its program about 'gender theory'".¹⁷ At the same time, the RN has embraced the "Wilders model": It emphasizes the antagonisms between Muslim immigrants and gay voters (since 2010) in order to seek the endorsement of the latter.¹⁸ As stated by Christèle Marchand-Lagier, "During the controversy in 2014 concerning the 'ABCD of Equality' proposed by Najat Vallaud-Belkacem, minister of women's rights, Marine Le Pen was instrumental in spreading rumours about interventions by LGBTI representatives in schools, and greatly overestimated the number of trial studies conducted by the government."¹⁹ However incongruent as it may sound, such a message causes an erosion in the quality of public discourse about gender, and, over time, gender-empowering mechanisms could be impaired. The deterioration is slow, almost indiscernible, but incremental, and it is difficult to place it within a defined timespan.²⁰

As entrepreneurs of populist politics spread across Europe, we see that, while the content of their message can differ according to local circumstances, their strategies invariably follow the same winning formula. They obey the entrepreneurial criteria of costs vs benefits. Once gender is framed as a

14 An overview of anti-gender movements opposing marriage equality, abortion, reproductive technologies, sex education, transgender rights, anti-discrimination policies and the notion of gender itself is provided in Roman Kuhar, David Paternotte, eds., *Anti-Gender Campaigns in Europe: Mobilizing against Equality* (London: Rowman & Littlefield, 2017).

15 Cas Mudde, *On Extremism and Democracy in Europe* (London–New York: Routledge, 2016), 9.

16 Democratic backsliding in several CEE countries is described in Licia Cianetti, James Dawson, Seán Hanley, eds., *Rethinking 'Democratic Backsliding' in Central and Eastern Europe* (Abingdon: Routledge, 2019). For a thorough analysis of the Hungarian case, see Matthijs Bogaards, "De-democratization in Hungary: diffusely defective democracy," *Democratization* 25, no. 8 (2018): 1481–1499.

17 Gaël Brustier, "France," in *Gender as Symbolic Glue. The Position and Role of Conservative and Far Right Parties in the Anti-gender Mobilizations in Europe*, eds. Eszter Kováts, Maari Pöim (Budapest: FEPS – Foundation for European Progressive Studies in cooperation with the Friedrich-Ebert-Stiftung, 2015), 24.

18 For the peculiar situation of a female populist leader such as Marine Le Pen, see Dorit Geva, "Daughter, Mother, Captain: Marine Le Pen, Gender, and Populism in the French National Front," *Social Politics: International Studies in Gender, State & Society* 27, no. 1 (Spring 2020): 1–26.

19 See Christèle Marchand-Lagier, "Country case study France," In *Triumph of the women? The Female Face of the Populist & Far Right in Europe*, ed. Elisa Gutsche (Berlin: Friedrich Ebert Stiftung, 2018), 54.

20 For the effects of anti-gender campaigns with a particular focus on CEE countries, see Andrea Krizsán, Conny Roggeband, "Reversing Gender Policy Progress: Patterns of Backsliding in Central and Eastern European New Democracies," *European Journal of Gender and Politics* 1, no. 3 (2018): 367–385. For a very useful comparison of today's situation in Hungary with the one before Victor Orbán's rise to government, see Katalin Fábián, *Contemporary Women's Movements in Hungary: Globalization, Democracy, and Gender Equality* (Washington: Woodrow Wilson Center Press, 2009).

culture war, a populist actor can use it to gain benefits at a very low cost. He can claim democratic and pro-choice credentials and raise support among voters who think of themselves as democratic and pro-choice while at the same time actively undermining democracy and gender equality.

Therefore, in order to react effectively and in time to defend democracy and gender equality, we must raise the costs of populist strategies centred on anti-gender culture wars. It seems now to be common opinion that a democracy has the vital right to defend itself by preventing anti-democratic attacks in general. In fact, most democracies provide constraining regulations on political expression and associations, and “scholars largely agree that limitations on basic rights of expression and participation, enacted to safeguard democracy, are compatible with the principle of liberal constitutional democracy”.²¹ Until recently, militant democracy was considered as part of the twentieth century’s “age of extremes”. However, as stated by Jan Werner Müller, the “recent upsurge of racism and widespread disquiet about religion”, as well as “new forms of authoritarian politics (think of Russia and Hungary) that do not officially break with democracy and continue to hold more or less free and fair elections”, call for practical steps of containment.²² As the ancient Roman dictum *si vis pacem, para bellum* says, an effective defence requires proper weapons. Unfortunately, when it comes to the particular case of gender equality, the core concept of militant democracy (as we understand it today) does not apply sufficiently.

Keeping Militant Democracy up with the Times

As Otto Pfersmann put it, “Democracies are always more or less militant.”²³ Each democracy puts particular emphasis on the protection of elements it deems vital. Thus, for example, Italian militant democracy performs at its best when dealing with “secret associations and those which pursue, even indirectly, political ends by means of organisations of a military character” mentioned in Article 18 of the Italian constitution.²⁴ Article XII of the Italian constitution’s “Transitory and Final Dispositions” section specifies further that “it shall be forbidden to reorganise, under any form whatsoever, the dissolved Fascist party”²⁵ because, as the leaders of the left-wing parties stated in the Constituent Assembly, “one has to exclude from democracy those who have manifested to be its enemy”.²⁶ Peter Niessen rightly observes that the “particular significance or relevance” assigned to the historical experience in Italy, but also in Germany, in place of a more comprehensive logical criteria, is at “risk of anachronism”.²⁷ However, such a choice “depends on questions of guilt, shame, responsibility or liability, which will be influenced by whether a society comprises perpetrators and/or victims, and whether it

21 Giovanni Capoccia, “Militant Democracy: The Institutional Bases of Democratic Self-Preservation,” *Annual Review of Law and Social Science* 9 (2013): 219.

22 Jan-Werner Müller, “Protecting Popular Self-Government from the People? New Normative Perspectives on Militant Democracy,” *Annual Review of Political Science* 19 (2016): 250.

23 Otto Pfersmann, “Shaping Militant Democracy,” in *Militant Democracy*, ed. András Sajó (Utrecht: Eleven International Publishing, 2004), 53.

24 “Sono proibite le associazioni segrete e quelle che perseguono, anche indirettamente, scopi politici mediante organizzazioni di carattere militare”; see the Italian constitution at <https://www.senato.it/documenti/repository/istituzione/costituzione.pdf>.

25 “È vietata la riorganizzazione, sotto qualsiasi forma, del disciolto partito fascista”; *ibid*.

26 Italian Communist Party leader, Palmiro Togliatti, at the Italian Constituent Assembly, quoted in Peter Niessen, “Anti-Extremism, Negative Republicanism, Civic Society: Three Paradigms for Banning Political Parties – Part I,” *German Law Journal* 3, no. 7 (July 2002), published online 06 March 2019, 92.

27 Niessen, “Anti-Extremism,” 97.

has been coping with its past by means of denial, rage, silence or remorse".²⁸ In a similar vein, in Spain, judicial actions against extremist parties are held constitutional given the historical experience both with the Franco regime and with the Basque separatist organization ETA.²⁹ In the case of France, a set of legal regulations provide for a defence of "core principles", especially the republican principle and the separation between church and state, in other words, *laïcité*.³⁰

Thus, historical causes like resistance to fascism, separatism or clericalism play a preeminent role in the militant democracy agenda of various European nations. But what about a cause such as gender which has not had the opportunity ever before to raise its voice? Regrettably, when it comes to issues purportedly related to a sense of cultural and moral unease – those not bound by traditional ideological categories – democracy is far less militant than when it is about historically more identifiable features of political extremism. However, when the entrepreneurs of populist politics deform the democratic dialogue into a dysfunctional, polarized and often dishonest confrontation by using symbolic references to morally troubling gender issues, democracy appears unarmed and thus unable to defend its fundamental quality: the extent and content of discussion in the public sphere.

In order to react effectively, we must select the most appropriate means of countering this kind of anti-democratic strategy. Therefore, if we consider militant democracy as a useful remedy against democratic backsliding, we must extend its scope from the institutional to the deliberative and egalitarian component of democracy as well, which includes gender equality. Such a shift in the understanding of militant democracy may sound too demanding since it involves all civic processes of interaction between citizens and not just electoral campaigns or party competition. Nevertheless, if we consider its core idea, militant democracy was invented exactly for that purpose: to reach beyond the procedural aspects in order to effectively identify substantial attacks on democracy.

That is of special importance since populists are well able to outmanoeuvre the formal definition of unconstitutionality by masking attacks on human dignity using dog-whistle strategies. Dog-whistle politics involve acts of communication that contain two different messages: one that comes at face value and another that includes offences that do not appear at face value and thus can be disavowed. This is a "coded, concealed message, intended for just a subgroup of the general audience" that exploits "a little-known ambiguity".³¹ A democracy unable to unmask the exploitation of (in some cases even very well-known) ambiguities and thus prevent dog whistles is therefore incapable of identifying acts that are picked up by the relevant targeted audience. This kind of democracy falls short on the protection of its basic principles. To quote Peter Niessen once again, "Looking at democracy not as itself protected (against extremists or historical foes) but as protective of minorities and later generations, is inspired by theories of civil society."³² These theories hold that "harm to individuals, and to the integrity of this

28 Ibid.

29 According to Victor Ferreres Comella's highly critical position of Spain's statute on political parties (*Ley Orgánica de Partidos Políticos*) introduced in 2002, "The only need that the government and the main parties felt was the need to ban Batasuna. The statute might as well have been called 'Statute to outlaw Batasuna'." Victor Ferreres Comella, "The New Regulation of Political Parties in Spain, and the Decision to Outlaw Batasuna," in *Militant Democracy*, 146. See in detail also Carlos Vidal Prado, "Spain," in *The Militant Democracy Principle in Modern Democracies*, ed. Markus Thiel (Farnham, Ashgate: Routledge, 2009), 243–262.

30 See Claire-Lise Buis, "France," in *The Militant Democracy*, ed. Markus Thiel, 75–108.

31 Jennifer Saul, "Dogwhistles, Political Manipulation, and Philosophy of Language," in *New Work on Speech Acts*, eds. Daniel Fogal, Daniel W. Harris, Matt Moss (Oxford: Oxford University Press, 2018), 363. For the social and political impact of dog-whistle politics, see also Carl Fox, Joe Saunders, eds., *Media Ethics, Free Speech, and the Requirements of Democracy* (New York: Routledge, 2019), and in particular Joe Saunders, "Lynton Crosby and the Dark Arts of Democracy," *ibid.*, chapter 3.

32 Niessen, "Anti-Extremism," 108. However, according to Niessen, such an approach is not suitable since the price to pay in terms of expressive liberty "seems unacceptably high"; *ibid.*, 111.

form of life, is therefore largely to be expected from expressive offences, from manifestations of disregard, disdain, superiority or contempt".³³

Such an approach against strategies like dog whistles undoubtedly clashes with expressive and participatory liberty. Nevertheless, as mentioned, that is just the point with militant democracy: It must involve special measures to contrast effectively political groups that systematically violate the human dignity of other persons. Otherwise, it is totally useless to talk about democracy's right to defend itself from its foes. As it is well known, historically, militant democracy emerged from the Weimar experience as a reaction to the Nazi Party strategy of formal compliance with democratic procedures while destroying its deliberative and egalitarian component. In Joseph Goebbels' notorious definition, the "best joke of democracy" is that "democrats provide their enemies with the means to get rid of democracy".³⁴

This was also the argument at the very core of the idea of militant democracy, as promoted by its father Karl Loewenstein.³⁵ Fascism, claimed Loewenstein, is "the most effective political technique in modern history. . . . Its success is based on its perfect adjustment to democracy. Democracy and democratic tolerance have been used for their own destruction. . . . It is the exaggerated formalism of the rule of law which under the enchantment of formal equality does not see fit to exclude from the game parties that deny the very existence of its rules."³⁶

Against what Loewenstein called the "saboteurs of democracy"³⁷, even when under the guise of anti-gender culture war crusaders, we must reassert the ability to identify the enemies of democracy and reject the thesis of political neutrality in gender issues.

The Italian Case Study

As an example both of a culture war over a morally troubling gender issue (seemingly disconnected from ideological categories) and of a dog-whistle strategy, I will quote Matteo Salvini, the leader of two parallel parties: the Northern League (LN; Lega Nord) and Lega per Salvini Premier (LpSP; League for Premier Salvini).³⁸ At his Rome rally on 16 February 2020, Salvini stated the following:

First aid nurses from Milan told me that there are women who have presented themselves for a pregnancy termination for the sixth time. I will not go into the merits of a choice that belongs only to a woman. It is not for me or the state to give morals or ethics lessons to anyone. A woman has the right to choose for herself and her life. But you can't take the emergency room as the solution to a lifestyle which is considered uncivilized in 2020. Do I believe that women who abort are uncivilized? If you come to the seventh termination of pregnancy, it means that your lifestyle is wrong. I

33 Ibid., 109.

34 Capoccia, "Militant democracy," 208.

35 Karl Loewenstein, "Militant Democracy and Fundamental Rights, pt. I," *The American Political Science Review* 31, no. 3 (June 1937): 417–432.

36 Ibid., 423–424.

37 Ibid., 426.

38 Salvini announced the birth of the second party LpSP on 1 February 2020; see Federica Valenti, "Nasce la nuova Lega di Salvini. La vecchia diventa una 'bad company,'" *Agi Agenzia Italia*, February 1st, 2020, https://www.agi.it/politica/nuova_lega_congresso_salvini_giorgetti-6987591/news/2020-02-01/.

agree with the doctors who say that a woman is free to choose but, if after a short time she comes to ask for the seventh pregnancy termination... we must explain to her how to behave.³⁹

As has already been said, the culture war exploits our emotional unease to turn democratic dialogue into a dishonest confrontation. The quoted statement is an example of dishonesty since, in Italy, you cannot go to the emergency room to have a pregnancy voluntarily terminated. The procedures are much longer, and an actual termination of pregnancy can only take place in hospitals or clinics within 90 days of conception. Salvini's repeated pro-choice claim ("I will not go into the merits of a choice that belongs only to a woman", etc.) is instrumental in being in tune with the broadly shared pro-choice attitude among female voters while at the same time actively undermining their autonomy ("we must explain to her how to behave").

Furthermore, it is an example of the dog-whistle strategy that includes a manifestation of contempt and superiority that does not appear at face value. According to the newspaper *Il Fatto Quotidiano*, Salvini also said that the emergency nurses told him about some women "who are not from Rome and not from Milan"⁴⁰ who went to the emergency room to have an abortion for the sixth time – an implicit message that the shocking revelation does not involve Italian women but only immigrant women. However, the latest report from the Italian Ministry of Health, which provides data about pregnancy termination for 2017, paints another picture. According to it, the percentage of abortions performed for women with previous abortion experience was 25.7% in 2017 – the figure for Italians was 21.3% and 36.0% for foreigners.⁴¹ As for our civilization in 2020, it is uncivilized to cry out against abortion and to leave aside the reasons for this choice, which, more than cultural, are social in nature and may depend on the welfare opportunities that the state puts in place for both citizens and immigrants.

Most of all, we should bear in mind that such messages related to gender issues are not isolated episodes, but a strategy. Strategies (or, as Loewenstein said, political techniques) are not based on a single decision but rather a combination of methods of actions adopted by an actor according to a coherent long-term plan. Salvini, like almost all other populist leaders, is an experienced professional politician. Being an entrepreneur of populist politics, he selects key objectives and appropriate targets, and he carefully decides which tactics to use, when to use them and at what cost. His long-term aim is the partly concealed, incremental and intentional dismantling of the quality of the deliberative and egalitarian component of democracy.

Gender-related issues are instrumental to that strategy insofar as we fail to recognize their centrality to an open, equal and free society and mistake them for culture wars. Therefore, gender appears as the new frontier of militant democracy. The latter was invented with the specific aim of effectively preventing political strategies based on the systematic violation of human dignity. We must keep militant democracy up-to-date if we want to preserve its functionality. Specifically, it means that we cannot hide any more behind the "culture war" narrative. We must devise effective actions that make anti-gender strategies cost-prohibitive or, in the worst-case scenario, exclude the foes of gender equality from the democratic game.

39 See "Matteo Salvini sull'aborto: 'Il pronto soccorso non è la soluzione a stili di vita incivili'. Critiche di Pd e M5S," *la Repubblica*, February 16, 2020, https://www.repubblica.it/politica/2020/02/16/news/salvini_sull_aborto_il_pronto_soccorso_non_e_soluzione_a_stili_vita_incivili_-248746596/.

40 See Eliana Cocca, "Salvini, ciò che è davvero incivile nel 2020 non è certo uno 'stile di vita'," *Il Fatto Quotidiano*, February 17, 2020, <https://www.ilfattoquotidiano.it/2020/02/17/salvini-aborto-incivile/5708700/>.

41 See "Relazione del ministro della salute sulla attuazione della legge contenente norme per la tutela sociale della maternità e per l'interruzione volontaria di gravidanza (legge 194/78)," Ministero della Salute, Roma, 31 dicembre 2018, 3, http://www.salute.gov.it/imgs/C_17_pubblicazioni_2807_allegato.pdf.

Make Misogyny Great Again. “Anti-gender” Politics in Poland

ANNA GRUDZINSKA

In the on-going process of recurring patterns of social practice, the quality content of masculinity and femininity becomes not just the gender identities or gender displays of individuals, but also, and perhaps more importantly, a collective iteration in the form of culture, social structure, and social organization. The idealized features of masculinity and femininity as complementary and hierarchical provide a rationale for social relations at all levels of social organization from the self, to interaction, to institutional structures, to global relations of domination.

– Mimi Schippers¹

We will glorify war – the world’s only hygiene
– militarism, patriotism, the destructive gesture of freedom-bringers, beautiful ideas worth dying for and the scorn of women.
Manifesto of Futurism, 1909

Political Community: Kaczyński’s Rejuvenation of Body Politics

The past decade has seen the rapid rise of authoritarian governments in many countries across the globe. A considerable amount of literature has been published on the decline of democracy. One of the most significant theoretical discussions focuses on populism. To date there has been little agreement on what “populism” stands for. Although differences of opinion still exist, there appears to be some agreement that populism is a type of political rhetoric which allows political actors to create polarization.² Polarization may put democracy at risk, but in order for it to become critically destructive, additional conditions must be met. My contention is that polarization undermines democracy when political opponents are presented as lacking political legitimacy and hence not belonging to the political community.³ In such discourses, norms and values are weaponized to undermine the democratic debate itself.

Much of the current literature pays particular attention to right-wing populism, which has in some parts of the world empowered authoritarian leaders (Turkey, Hungary, Brazil and so on). These studies, however, do not sufficiently explain the relationship between so-called anti-gender politics and the rise of the authoritarian state. Not all far-right or radical right-wing parties that have come to power

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- 1 Mimi Schippers, “Recovering the Feminist Other: Masculinity, Femininity, and Gender Hegemony” in *Theory and Society* 36 (March 2007): 91.
 - 2 Populism is also often defined as “anti-elitism”. I would reframe that claim to say that it can also take the form of scapegoating vulnerable groups which are not part of the elite. Populism, in and of itself, does not have to be anti-democratic, but it often does become detrimental to democracy when it positions one group within society as the “enemy”.
 - 3 This is a process described by Chantal Mouffe as a move from agonism to antagonism. See Chantal Mouffe, *Agonistics. Thinking the World Politically* (London, New York: Verso, 2014).

in recent years (or sway current political affairs) across the world, in fact, challenge gender equality.⁴ Quite the contrary, some define the liberation of women as one of their goals and criticize members of minorities or migrant communities for undermining women's rights.⁵ So populism by itself has no inherently gendered structures.⁶ It is only when populism serves to promulgate radical right-wing or far-right ideologies that this is actually true.⁷ And so, I will concentrate on the Polish case so as to analyse how "populist nationalism" becomes a tool used to obliterate not only women's rights but also constitutional democracy as such.⁸ My aim is to reply to the question of what radical right-wing populists gain by undermining women's rights. And my contention is that subverting gender equality in Poland is crucial to the process of undercutting the current political system's legitimacy, which opens the door to regime change.

To understand the interconnectedness between the national rejuvenation project of the Polish right wing and the attack on gender equality, one must place it in a broader context of the illiberal revolution brought about by the party Law and Justice (PiS; Prawo i Sprawiedliwość). In the chapter that follows, I will first give a brief summary of the key elements of Kaczyński's vision of state and society. Then, I will show why the attack on gender equality plays a central role in the political strategy of PiS. I will also demonstrate that these ideas are not novel but have been a constant element in Polish politics since the nineteenth century. This paper contests the claim that populism is the central problem of current Polish politics. It is rather the concept of "nation", or more precisely, the ultranationalist concept of political community that is the key ingredient in Polish "populist nationalism", which presents a challenge to the democratic order of the state. I concur with Dorit Geva that certain "gender

4 Doris Geva, "Daughter, Mother, Captain: Marine Le Pen, Gender, and Populism in the French National Front," *Social Politics* (Summer 2018): 1–26.

5 As demonstrated by Sara Farris, the far-right parties typically advance an Islamophobic agenda in the name of women's rights. And so, women's rights become a political tool used against migrant communities. For more, see Sara Farris, *In the Name of Women's Rights: The Rise of Femonationalism* (Durham: Duke University Press, 2017).

6 I agree with Dorit Geva that scholars often conflate populism and the Far Right, which is problematic as they are not the same. However, I disagree with the claim that populism *as such* is "gendered". There are many cases of left-wing populism which do away with the performative "father"/"mother" of the people. A case in point can be the kind of populist politics enacted by Podemos in Spain.

7 In the Polish case, the party Law and Justice, which started as a right-wing party, has shifted towards the Far Right in recent years.

8 Cas Mudde points out that populism should not be conflated with nationalism as these are two different analytical categories. Moffit suggests that the blurring of these concepts is a major theoretical problem, and many scholars use these terms almost as a way of designating synonymous ideas. However, populism, nationalism and nativism are not the same. These concepts can, however, co-exist since nationalism and populism often go hand in hand. What is more, populism has no inherent political affiliation. It can be right- or left-wing. The key insight in these processes was given by Stavrakakis, who pointed out that populism creates a chain of equivalence around the signifier of "the people", while nationalism aims to arrest this "floating" signifier in order to create boundaries within political community. In that sense, "nationalist populism" is a version of populism which undermines the universalism of peoplehood in order to create a narrow vision based, typically, on ethnic and cultural markers of identity. I would add that, in the case of populist nationalism, the enemy is not always the "elite" but rather a group which simply stands out, and thus, they are stigmatized or scapegoated (and serve as the "enemy"). The difference is between the universalism of "peoplehood" and the particularism of nationalism. It is also important to emphasize that in the Polish language, historically "nation" (*naród*) and "people" (*lud*) were associated with two opposing political traditions (the right- and left-wing, respectively). Hence, the idea of the "peoplehood" is associated with Marxism or the left-wing, more broadly. It would be almost impossible to imagine anyone of the Far Right or the right wing in Poland speaking of the "people". The middle ground between the two is occupied by "society". Society is seen not as a neutral term but as a stand-in for civic-minded individuals who associate or identify as citizens within civil society or, more generally, institutions of the state. Hence, the language used is not neutral – rhetoric matters a great deal. See Ernesto Laclau, *On Populist Reason* (London and New York: Verso, 2002). Cas Mudde, *Populist Radical Right Parties in Europe* (Cambridge: Cambridge University Press, 2007). Yannis Stavrakakis, "Paradoxes of Polarization: Democracy's Inherent Division and the Anti-Populist Challenge," *American Behavioral Scientist* 16, no. 1 (2018): 4–5.

performances" allow the Far Right to link national symbols with the illiberal political platform. Hence, the anti-gender campaign (or campaign against gender equality) figures as the necessary link between the illiberal agenda and populism and allows the ultranationalist vision of state and society to become anchored in the familiar sphere of the domestic.

The architect of the new political order, Jarosław Kaczyński, the leader of Law and Justice, defined his vision of the Polish state, its "people", and the good life during a constitutional convention organized by PiS in 2003. In the speech Kaczyński delivered at the convention, he revealed his views on the political transformation currently in the making. First of all, according to Kaczyński, Poles had to return to their traditions, which had been systematically undermined by the communist regime and, after 1989, by "the challenge of Europeanization", for example, through legal norms prescribed by the European Union such as the principle of gender equality. What is more, Kaczyński defined "a positive program" which would halt the decline of "tradition" brought about by Europeanization:

Poles who identify as citizens [*Polak-obywatel*], as Europeans [*Polak-Europejczyk*] or free men [*Polak-człowiek wolny*] liberating themselves from the constraints of tradition or traditional life (...) shall soon confront the reality, which will prove their identity to be a work of fiction. It is important to unite in a social movement that will be able to bring about a moral revolution, which will not only reject evil but also introduce a positive program.⁹

In other words, Poles who define themselves as Europeans (i.e., support the core values of the EU) are assumed to have been duped by the fantasy of Europe ("lemmings") or are designated as "second class citizens" (*gorszy sort*).¹⁰ The Catholic Church, according to Kaczyński, was the only institution which could legitimately articulate moral standards on Polish soil: "In today's Poland there is only one known normative order, this order is based on the teachings of the Catholic Church and the national tradition."¹¹

In other words, the national tradition and the teachings of the Catholic Church are intertwined and only PiS can be seen as the custodian of this defined moral code. The most important element of that tradition is the "Polish family". The adjective "Polish" is used by PiS politicians insistently to imply that the normative order defined by the Catholic Church sets standards and cultural norms that delimit the boundaries of what is acceptable as a family. As Kaczyński stated during the convention:

Neither the nation nor society are a loose association of individuals. The basis of all social life is the family. The family performs vital functions and guarantees the intergenerational continuity of a nation. This is why the family should be expressly protected by the law. And the special privileges families enjoy should be preserved and sheltered. They should be entrenched in the constitution. This not only means the protection of economic privileges and the safeguarding of parenting rights but also the exclusion from the aforementioned relationships other than that between a man and a woman.¹²

Interestingly, Kaczyński mentions both nation and society, two key words that define two different views on what constitutes political community in the Polish context. Society stands for civic bonds based on institutional and social affiliation or civic loyalty (republic, city, region, etc.), while nation, in

9 Jarosław Kaczyński, "Speech" (September 20, 2003).

10 Jarosław Kaczyński, Republica interview, <https://tvn24.pl/polska/jaroslaw-kaczynski-w-tv-republika-gen-zdrady-najgorszy-sort-polakow-ra602334-3320596>. "Lemmings" is a comparison used by the Far Right to mock those voting for "liberals" or, alternatively, lower middle-class people working for big corporations who are focused on individual success. This term is supposed to underscore "weakness", consumerism and a naïve approach to politics.

11 Jarosław Kaczyński, "Speech," (September 20, 2003).

12 Ibid.

such a view, is an intergenerational community (including those who are dead and those who are yet to be born). Logically, following from Kaczyński's statement, the nation is understood and defined organically; in other words, there is the assumption of genetic/biological continuity. If nation is so charted, then, obviously, minority members, foreigners or refugees cannot become part of a community defined as so.¹³ In short, there are two important ramifications to take away from Kaczyński's speech at the convention: The family is essential because it safeguards the existence of the "nation" not because it is important in and of itself. Secondly, it is assumed that only the relationship between a man and a woman can be considered family as it safeguards national survival. Kaczyński's vision transgresses the boundary between private and public in order to determine what is thinkable for men and women as a "good life". Hence, not only the emancipation of women but also the rights of the LGBTQ community are outside of the bounds of the defined political agenda, not to mention refugee protection; all of which undercut the "intergenerational continuity" of which Kaczyński speaks.

Another aspect of the political order Kaczyński denounces is the lack of primacy of nation in the 1997 constitution's text. The constitution, which encompasses both a republican-civic and a national idea of political community is rejected by PiS. Since the constitution puts Catholic Poles and atheists on the same footing, such equality is seen as a petrification of "communist" social relations. The separation of church and state (or secularism, more broadly), viewed from PiS's perspective, removes the clergy from the political sphere, which the right-wing leader construes as hostility towards the Catholic Church. The ideas presented in the constitution, according to Kaczyński, are a surrender of the drafters (former opposition) to their former communist tormentors (post-communist parties).¹⁴ Kaczyński demands a clear break from the past and the restoration of the Catholic Church to its "proper" role, both in the state and within society. The proof that the 1997 constitution established a deceitful compromise is, according to the PiS leader, the rejection of the *invocatio Dei*, which would anchor the axiology of the political system in the Catholic tradition. The lack of an *invocatio Dei*, as seen by the right wing, led to the adoption of a foundational document devoid of markers of national identity, or more precisely, its Christian values.¹⁵ The constitution, according to Kaczyński, promotes moral confusion by including a range of values (including humanism, secularism or even atheism) into the axiological realm. As an alternative, Kaczyński postulates a new republic which would start with a new constitution. This project, called the Fourth Republic, would present a new start for the "Polish nation", the only sovereign of the Polish state.¹⁶

This nativist concept of political community has longstanding roots in the political theories of Roman Dmowski (1864–1939), one of the founding fathers of the twentieth century Polish state. Dmowski's views on nation, based on social Darwinism and national egoism, are typically contrasted with the political legacy of the multi-ethnic Polish-Lithuanian Commonwealth (1569–1791), which was embodied by Marshall Józef Piłsudski (1867–1935) during the time of the Second Republic. These two men and their visions of state and society could not be more different. Kaczyński's current political ideas, in that sense, are a prolongation of the legacy of Roman Dmowski. Clearly, this is not a straightforward line of tradition but rather the effect of this lingering vestige of the Second Republic (1918–

13 Directly expressed by Kaczyński in a speech delivered during the convention is that minorities do not belong to the "nation", yet Poland should be considered their homeland. Even so, Kaczyński emphasizes that minorities should not impose their norms and values on the majority.

14 The constitutional text was, indeed, approved by a predominantly left-wing parliament, and so the right-wing parties (the former Solidarity Electoral Action; AWS) undermined its legitimacy from the get-go.

15 Typically, the right wing uses the term "Christian" instead of "Catholic" in a bid to underscore the universality of the creed and to defend against accusations of particularism.

16 Jarosław Kaczyński, "Speech" (September 20, 2003).

39) in Polish politics.¹⁷ Even if Kaczyński does not refer to Dmowski directly, the political imagery of Polish “nationalism” was shaped by this ideologist of interwar politics.

Dmowski defined nations based on a combination of racial, social and historical traits. As a biologist he often compared nations to living organisms, and he unquestionably imagined societies in such an “organic” way.¹⁸ In *The Thoughts of a Modern Pole*, Dmowski urged Poles to become modern and defined “being modern” as a rejection of “passive” or “submissive behavior”, which he understood as a consequence of kindness, charity, humanitarianism, selflessness and tolerance.¹⁹ These were the national characteristics, which according to Dmowski, had led Poland to ruin and were responsible for the loss of independence. The Polish nation, in Dmowski’s view, should shed all the effeminate qualities which make it “weak”. The “national pedagogy” of Dmowski, which was directed against Jewish Poles, the gentry and, most importantly, any sense of “vulnerability” is echoed in current debates. Dmowski advocated military might and economic self-sufficiency, promoted anti-Semitism (especially directed against the Jewish middle class) as a “modern” political ideology and, finally, championed a national struggle understood in Darwinian terms as the survival of the fittest. Above all, Dmowski favoured social discipline, strength and moral unity.²⁰

National egoism (or chauvinism) and thirst for international influence were the key values Dmowski endorsed, which is what makes his philosophy of nation so appealing to current populists. As Kevin Passimore pointed out, “In the 1890s many Polish nationalists broke with liberalism and prioritized ‘will’. They believed that xenophobia, aggression, and violence would make the Polish nation.”²¹ A recent study by Paweł Brykczyński which focuses on the assassination of President Gabriel Narutowicz in 1922 shows that the ideology of Endecja (as the interwar, right-wing party associated with Dmowski, formally named National Democracy, was often called) was far from benign, and its adherents were ready to use violence to enforce their vision of “Polishness”.²² The assassination of Narutowicz was often portrayed by scholars as an insignificant incident perpetuated by an emotionally unstable individual. However, the assassin was clearly inspired by Endecja’s hateful anti-Semitic propaganda.

As Brykczyński suggests, Endecja’s affinity with fascism should be re-evaluated more seriously by scholars, especially since its legacy looms large in current Polish politics. This pertains, especially, to the rampant anti-Semitism, which was the driving force behind the assassination of Narutowicz.²³ The study of Endecja’s hate propaganda reveals why so many Poles confronted Narutowicz for being elected by “Jewish votes”, and why violence broke out in Warsaw after his election.²⁴ The events of December 1922 forced many politicians to support the marginalization of minorities in parliament; a few politicians took a chance by condemning the instigators of the violent clashes which broke out in the streets of Warsaw following the election of Narutowicz. This was a pivotal moment, according to Brykczyński, when most parties, for fear of political repercussions, surrendered to Endecja’s vision of Poland.

17 Barbara Toruńczyk, “Dlaczego Endecja?” in *Opowieści Wschodnioeuropejskie* (Warszawa: Zeszyty Literackie, [1979] 2013), 125–135.

18 Roman Dmowski, *Myśli Nowoczesnego Polaka* (Warszawa: Wydawnictwo Zachodnie, 1934), 51.

19 Ibid, 65. See also: 50–55.

20 All these traits were transferred into the Camp of Great Poland’s (OWS; Obóz Wielkiej Polski) political action programme, which in its declaration, published in 1926, defined these principles as the key aspect of the national rejuvenation programme. See “Deklaracja Obozu Wielkiej Polski” (Wilno: Drukarnia “Ruch”, 1926).

21 Kevin Passimore, *A Very Short Introduction to Fascism* (Oxford: Oxford University Press, 2002), 39.

22 Paweł Brykczyński, *Gotowi na przemoc. Mord, antysemityzm i demokracja w międzywojennej Polsce* (Warszawa: Wydawnictwo Krytyki Politycznej, 2017), 258–261.

23 Ibid. 253–256

24 Ibid. 256.

Eva Plach shows that the deep polarization of society in the interwar period resulted from a "sick post-partition political culture".²⁵ In short, two "moral" camps clashed: the liberal-left leaning camp of the Piłsudskiites, which attempted to modernize Poland and break "the seemingly inviolable connection between Catholicism, Polishness, and patriotism",²⁶ and, secondly, the right-nationalist-Catholic camp, which decried secularization as a "deep moral rot that infested the Polish national body".²⁷ In other words, these divisions were not only political but also ethical and cultural. As Plach emphasizes, the fight between the camps was about the political and moral authority to define the future of Poland.²⁸ What is even more important, the focus of many debates was on moral and sexual questions.²⁹ Obviously, this meant that gender roles and sexual morality became pivotal in many debates of the day. These controversies were a side-effect of the "encounter with European modernity", which generated an explosive combination of political ideas.³⁰ This blend of ideas and controversies about social modernization is still pertinent in today's Poland. The communist period created its own version of "communist nationalism", which was used to leverage the legitimacy of the communist Polish United Worker's Party (PZPR; Polska Zjednoczona Partia Robotnicza).³¹ Yet, communism did not obliterate the ideological conflicts of the Second Republic; despite being crippled by censorship and authoritarianism, these disagreements lived on among the Polish opposition and intellectuals.³²

When construed in its historical context, the "anti-gender campaign" cannot come as a surprise. The architects of the organic "nation" protect not only the living but also those who perished (by preserving their memory) and future members (by making sure there are enough women ready to give birth). Politically, women are important primarily as mothers, as they prolong and protect the existence of the nation. In other words, what women do with their bodies ceases to be (if it ever has been) a private matter and becomes their social and political *raison d'être*. The emancipation of women undermines the national project as understood by the right wing. Hence, the "dead bodies" of past heroes and the bodies of those yet to be born take centre stage in the national project of Law and Justice.³³ The idea of the revitalization of nation, which is advocated by Kaczyński, is close to what expert on fascism Roger Griffin calls the "palingenetic myth".³⁴ According to the founding father of the Far Right, Roman Dmowski, the moral rebirth of the nation would allow Poles to become truly "modern", and, as I will demonstrate, this is also the kind of "modernizing" philosophy circulating among the ideologues of the current regime.

25 Eva Plach, *The Clash of Moral Nations: Cultural Politics in Piłsudski's Poland, 1926–1935* [Internet] (Ohio University Press, 2014), 6, <https://www.perlego.com/book/662536/the-clash-of-moral-nations>.

26 Eva Plach, *The Clash of Moral Nations*, 7.

27 Ibid.

28 Ibid., 8.

29 Ibid.

30 Ibid., 10

31 Marcin Zaremba, *Komunizm, legitymizacja, nacjonalizm. Nacjonalistyczna legitymizacja komunistycznej władzy w Polsce* (Warszawa: Instytut Studiów Politycznych PAN, 2005).

32 Barbara Toruńczyk, *Dlaczego Endecja?* 125–135.

33 See also: Katherine Verdery, *The Political Life of Dead Bodies. Reburial and Postsocialist Change* (New York: Columbia University Press, 1996).

34 Roger Griffin, *Modernism and Fascism. The Sense of a Beginning under Mussolini and Hitler* (New York: Palgrave Macmillan, 2007). Roger Griffin, *The Nature of Fascism* (New York: St Martin's Press, 1991).

Polish Women and Body Politics

The interwar period (1918–39) was the heyday of women’s liberation. Polish women were granted the right to vote in November 1918, only weeks after Poland regained independence, putting an end to 123 years of subjugation to the bordering imperial powers. The role of women in Polish society (in and outside the home) was strongly pronounced; hence, Polish women achieved suffrage early on. However, this was not to everybody’s liking and soon campaigns against the presence of women in public life were initiated. Women were reminded of their place within society – assigned to them by “God and history”. In the Polish case, women’s rights and the issue of “national survival” have always been intertwined. The continuity of the Polish language and culture during the nineteenth century when the Polish state lost sovereignty was, indeed, possible to a large extent as a result of its nurturing within the private realm of the home (i.e., gentry estates). As Eva Plach points out:

Commentators from across the political spectrum in the Second Republic heralded women of the partition era for fulfilling their “natural” roles as bearers of national culture as well as for having played an indispensable role in the national struggle, for protecting national virtues, for passing along language and tradition, and thus, at the most basic level, for ensuring, the very existence of the Polish nation.³⁵

The political role women played outside of the formal political realm under partitions blurred the boundary between public and private, which was also the reason why they were often attacked during the Second Republic for their alleged misconduct when, instead of supporting national causes, activists championed women’s self-determination. Women were also engaged in educational rights campaigns and other social and political activities, which gave them some leverage, but this was also the reason for intensifying attacks, notably mounted by Endecja. And so, women’s liberation became the axis of the debate about “modernizing” in the Second Republic. The conventional division of social responsibilities of men and women in society changed, which was seen by the nationalist camp as clear evidence of the “moral” corruption of Polish society. This type of moral panic, as historian Eva Plach pointed out, was quite common in many European countries after the Great War.³⁶ In Poland, it took on a particular dimension, and the right-wing parties consolidated to attack the changing mores, among which one could find familiar tropes of “Americanization”, provocative dances, divorced women, radio, free thinking and so on.³⁷ The notions of marriage, divorce and abortion, in fact, shifted dramatically in that period.

The culture war between the liberal-left and the Catholic right-wing sections of the society intensified during the *sanacja* period.³⁸ The immorality the right wing associated with all aspects of women’s liberation was seen as anti-Polish and a danger to the nation. Right-wing journals and periodicals challenged the advocates of women’s rights. The most prominent target of such attacks was Tadeusz Boy-Żeleński, a doctor and passionate activist who fought for family planning, birth control and civil marriage. In his famous book, *Piekło Kobiet* (Women’s hell), Boy-Żeleński argues that abortion should

35 Eva Plach, *The Clash of Two Moral Nations*, 21.

36 *Ibid.*, 17.

37 Eva Plach cites the right-wing publicist Mieczysław Piszczykowski. *Ibid.*, 138.

38 The term “*sanacja*” is generally understood to mean the period after the 1926 May Coup. Following the assassination of Naurtowicz, Piłsudski seized power in a military coup in order to prevent a right-wing takeover of the state. Many left-liberal circles welcomed the development to begin with; later, when the *sanacja* camp changed course, the relationship with the left-liberal intelligentsia circles was severed.

be legal.³⁹ He offers an elaborate defence of women’s reproductive rights. For example, he condemns the right wing’s argument that the duty of women was to preserve population growth:

The key line of argumentation [is] the issue of population growth, the so-called population policy – an apparently effective argument but only deceptively so. The problem known to humanity since antiquity has always been judged according to the needs of the moment; it either prohibited, tolerated or authorized abortion. The basis of this argument today is universal militarism. But a future war, which everyone hopes to prevent, would not so much depend on the number of people as it would on inventions, technical means, chemicals and so on.⁴⁰

As was pointed out in the introduction to this chapter, the idea of “modernizing” according to Roman Dmowski included developing military power. Women had a part to play in such a scenario, but it was strictly related to their role as mothers, which Boy decried in his writing. In that sense the discussions about political, social and sexual morality were intertwined, and the ideas of rebirth of nation circulated in the public debate. Yet each camp had its own understanding of that very idea. In the right-wing’s vision, a woman should relinquish her rights in the collective interest of the nation. For the liberal-left intelligentsia, the Second Republic was a period in Polish history when women finally could realize their potential beyond service to the national cause.

To sum up, the attainment of women’s full equality was stalled by the right-wing rhetoric of the interwar period. Women were forced to make an impossible choice between being considered “moral” and “patriotic” or traitors of the national cause. When they were not docile and cared about their individual freedom, women would be condemned as destroying the social order, which was seen as underpinning a morally healthy national life. The following section will discuss how the issue of women’s position in the public sphere was manipulated by the communist regime and served as a legitimization strategy for the regime in its takeover of the nationalist rhetoric.

Women’s Rights as the “Red Scare”

It is somewhat ironic that gender equality and the politics of gender mainstreaming are presented by the right-wing parties as the “Marxist spectre” haunting Poland. This is a paradox for the reason that, since the end of the Stalinist period in Poland (1948–56), the inclusion of women into the public sphere had intermittent or no state support. Although the communist regime paid lip service to the commitment to improve the conditions of life for Polish women, the reality was very far from that laudable pledge. Bizarrely, after Stalin’s death, women’s emancipation (especially when it comes to sexual liberation) was, often openly, discouraged. In Małgorzata Fidelis’s analysis of gender politics in communist Poland, the author points out that the communist party was actually approving of the “biological division” of roles between men and women. One of the reasons was the battle over political legitimacy fought against the Catholic Church. Although the Church and the communist party had very complex interests and the church-state relations under communism were mostly hostile, in some respects the Church had seen the party as their ally.⁴¹ A glaring example might be the issue of reproductive rights.⁴²

39 This text is related to the changes introduced in the Criminal Code in 1932 which made abortion legal in cases where the health of the mother was endangered or in case of rape.

40 Tadeusz Boy-Żeleński, *Piekło kobiet*, <https://wolnelektury.pl/katalog/lektura/pieklo-kobiet.html>.

41 After the war, the Catholic Church supported certain policies of the communist government, for instance, the agrarian reform. For more, see Mikołaj Kunicki, “Between Accommodation, Resistance, and Dialogue: Church-State Relations in Communist Poland, 1945–1989”, in *Peaceful Coexistence or Iron Curtain. Austria, Neutrality, and Eastern Europe in the Cold War and Détente, 1955–1989*, ed. Wolfgang Mueller, Arnold Suppan, 393–411 (Berlin: LIT Verlag, 2009).

42 Małgorzata Fidelis, *Kobiety, komunizm i industrializacja w powojennej Polsce* (Warszawa: WAB, 2010), 48–50.

This tendency was visible, particularly, after Gomułka took office. His model of communist society was closer to the lifestyles of rural communities he grew up in and defended in his politics. The state put emphasis on “men’s superiority over women”; the model proletarian became a male coal miner.⁴³ Working women, on the other hand, became the symbol of social degeneration in the Stalinist period. There was a state-sponsored campaign to remove women from jobs perceived as being traditionally a male domain.⁴⁴ In order to prove its legitimacy, the new, post-Stalinist regime embraced pre-war style nationalism, which was used to appease workers throughout the communist period.⁴⁵ The attack on the Stalinist model of gender relations was one of the central elements of the strategy applied to prove the “national” credentials of the new regime.

In her seminal study on women and industrialization, Fildelis argues that gender roles “remained a primary way of demarcating and understanding social hierarchies” in communist Poland.⁴⁶ Fildelis claims that enforcement of gender boundaries actually became the most valued instrument of legitimization for the new regime after Stalinism. Nevertheless, this does not mean that there were no female workers after de-Stalinization took place. Quite the contrary, female agency persisted, undermining not only traditional roles at home but also clashing with the party-state’s vision of Polish socialist society. Communist gender equality, however, was distorted as the social and cultural context, as Fildelis shows, was illiberal. There was no socially progressive legislation (as was the case in the 1920s in the Soviet Union). In the 1956–59 period, abortion was practically illegal, there was very strong pressure put on women to stay at home, underscored by the celebration of motherhood. The cliché image of *Matka Polka* (the Polish mother) did not go away. At the same time, women workers were treated much worse than men and were pushed out of their jobs. Assaults and sexual misconduct in the workplace were common. Finally, many women themselves opposed changes to the “traditional” way of life.

The most important conclusion of Fildelis’s study is that the post-1989 backlash against women’s rights is not very different from communist policies. Therefore, the right-wing’s idea that gender equality is re-establishing communist (Marxist) practices is rather mystifying as the right-wing backlash against equal opportunity should be seen as comparable to communist strategies. In both cases, women’s rights are used to prove “national” credentials and confirm legitimacy of the respective political agenda. Evidently, the “red menace” works quite well rhetorically in a society hostile to any traces of Marxist heritage, but, under close investigation, this line of argumentation cannot hold. In order to explain this paradox, I will examine the debate over the revocation of the Istanbul Convention. As I will demonstrate, the attack on social equality is at the heart of illiberal politics, which, when combined with ultranationalism, becomes irreconcilable with constitutional democracy. Populism serves as a useful tool in aggravating these divisions.

The fight against the Istanbul Convention and the Attack on “Western” Values

After the obliteration of the Constitutional Tribunal and the autonomy of the judiciary, it has become difficult to categorize Poland as a functioning constitutional democracy. I strongly disagree with the term “illiberal democracy” used to describe the current political arrangement, which simply masks authoritarianism. Nonetheless, there is theoretical value in applying the idea of illiberalism in the analysis of the social realm. I propose to define “illiberalism” as support for the maintenance of social

43 Ibid., 3.

44 Ibid., 189–223.

45 Marcin Zaremba, *Komunizm, legitymizacja, nacjonalizm*, 81–94.

46 Małgorzata Fildelis, *Kobiety, komunizm i industrializacja*, 2.

hierarchies which are endorsed by authorities (legally or otherwise) and enjoy recognition within society. Such hierarchies may be related to gender, sex, sexual orientation, age, religion and so on. Illiberalism is, in that sense, a sociopolitical agenda which rejects equality. Equality is the basic premise of democracy (not only liberal democracy). Therefore, “illiberal democracy” is a contradiction in terms used as a rhetorical stratagem by those authoritarians who endorse discrimination, racism and chauvinism, and it allows them to present their political project as functioning within the bounds of democratic acceptability. This is undoubtedly a trick that works to a point, and this is why it is important to achieve conceptual clarity when it comes to the characterization of illiberalism.

Liberalism, in the political sphere, is strictly related to the idea of human rights and their entrenchment in the constitutional order of the state, as well as to the system of checks and balances known as *the rule of law*. As already pointed out, Polish liberal democracy came to an end with the elimination of the judicial system’s autonomy. The separation of branches of government is the basic premise of the rule of law, yet the Polish courts are now, practically, under direct political control. Thus, the political system engineered by PiS is a combination of social and political illiberalism which cannot be regarded as “democracy”, simply put.⁴⁷

The question of the current regime’s legitimacy is tied to the clashing ideas of political community. The most recent electoral victory of Andrzej Duda confirms that the regime enjoys genuine social support. Even if the elections were conducted with serious irregularities, the victory of Duda shows that Polish society is fragmented when it comes to the vision of the future. Whether this victory confirms that Duda’s voters share Kaczyński’s vision of political community is another question. Undeniably, Duda, endorsed by PiS, backs the ideas and values underpinning PiS’ right-wing, nationalist platform. In that sense, the “illiberal revolution” scored another victory. However, there is strong opposition to this autocratic political strategy coming from more moderate sections of Polish society – mainly Civic Platform (PO; Platforma Obywatelska) supporters.

One of the most important aspects of the right-wing vision of nation is the “naturalization” of social and cultural hierarchies; in particular, the hierarchies within the family structure and between men and women. These hierarchies are central to the illiberal project. And so, I will analyse here the discussion that took place in the Polish parliament in 2015 in which the anti-gender rhetoric was particularly visible, specifically the debate over the ratification of the Council of Europe Convention on Preventing and Combating Violence against Women and Domestic Violence, also known as the Istanbul Convention. In July 2020, government officials announced the intention to withdraw from the convention. The debate that took place in parliament in 2015 sheds light not only on the rationale for such a step but also, more broadly, on how the anti-gender ideology is operating within the political strategy of PiS.

The convention sets legally binding standards for the protection of women against sexual harassment, domestic violence, stalking, forced marriage, forced abortion and so on, offering preventive measures, protection of victims, the state obligation to take legal action against perpetrators and, most importantly, effective redress. Thus, the document operates mainly within the area of national criminal legislation. Yet, the ideologues of the right wing see it as a dangerous document – to use the words of a Polish MP, a “Trojan horse”, introducing “gender ideology” into the national legislation.⁴⁸

As pointed out before, the Polish right wing understands gender roles and the “national tradition” as entangled. Hence, any shift in the “traditional” understanding of the social position of men and women is portrayed as an attack on the nation per se. The key ingredient of the naturalized vision of

47 Hence, the “rule of majority” in conditions of structural inequality should not qualify as democratic as it generates power imbalances precluding justice. Obviously, structural hierarchies can be endorsed by societies and can be legitimate. But such systems of government should not be classified as democracies as, typically, they preclude parts of the society from decision-making and self-government due to stark power imbalances. A good case in point is the system of apartheid. Any system that creates different categories of citizenry (legally or culturally) should be seen as infringing upon the basic premise of democracy.

48 “Sprawozdanie Stenograficzne, 86 Posiedzenie Sejmu w dniu 6 lutego 2015r” (2015), 255.

nation is hierarchy, which the convention undermines. The convention postulates “the realization of de jure and de facto equality between women and men” as a “key element in the prevention of violence against women”. So, by way of the convention, the state is not only obliged to protect women from violence but also make sure that equality becomes incorporated into the systemic structures of the state and in everyday social practice. What seems particularly aggravating to the right wing is the last aspect, namely the de facto elimination of social hierarchies. Without hierarchies in which power and authority are unequally distributed within society, the illiberal project loses its core message. And so, PiS’s MPs attacked the convention as “destruction of family” (Saurka), “disintegration of our civilization” (Girzyński) and a “crime against [Polish] social order” (Wróbel), to give just a few examples.⁴⁹

The convention was caricatured by the MPs not because it prevented violence against women, but because it defined the discrimination of women as a form of violence.⁵⁰ The preamble begins by “recognizing that violence against women is a manifestation of historically unequal power relations between women and men, which have led to domination over, and discrimination against, women by men”. Understandably, the structural nature of violence against women calls for social change. And this is precisely the element which the right-wing MPs opposed most zealously. The most striking statements of the debate are those of MP Marzena Wróbel: “Think about it, because in this way [through the convention] you destroy Polish society, you destroy the nation.”⁵¹

The defence of the naturalized social hierarchies by women is an element of a strategy which Mimi Schippers called “hegemonic femininity”.⁵² This strategy, as pointed out by many scholars, is often applied by women within the right wing. Dorit Geva characterizes “hegemonic femininity” as a strategy used by women to reproduce “hierarchies of race, sexuality, gender, and class; and, at the same time, reproduce masculine domination over women” and shows how this technique is used by Marie Le Pen.⁵³ As pointed out by many scholars, by underscoring social hierarchy, right-wing women legitimize their own standing within radical right-wing and far-right movements. A case in point may be women within the fascist Hindutva movement in today’s India.⁵⁴

Further, one of the most contentious ideas of the convention is the very definition of gender. The convention defines gender as “socially constructed roles, behaviours, activities and attributes that a given society considers appropriate for women and men”. First of all, the idea that gender should be translated as *pełń społeczno-kulturowa* stirred passionate debates among MPs during their work on the convention. Zbigniew Girzyński characterized the idea that gender was socially and culturally constructed as a “crime against our social order”. MP Beata Kempa stated,

And if you don’t know what’s going on, it is about confusing people’s minds. This is why [the convention is insisting on] education. Mr Niesiołowski, you should be aware of that fact, because, in line with the provisions of this convention, as far as gender is concerned, we can dispense with biology. And so, if in four days you feel that you want to be a woman, you can be called Stefania

49 “Sprawozdanie Stenograficzne, 86 Posiedzenie Sejmu w dniu 6 lutego 2015r” (2015), 249–255.

50 According to the convention, “‘Violence against women’ is understood as a violation of human rights and a form of discrimination against women and shall mean all acts of gender-based violence that result in, or are likely to result in, physical, sexual, psychological or economic harm or suffering to women, including threats of such acts, coercion or arbitrary deprivation of liberty, whether occurring in public or in private life”.

51 Marzena Wróbel, in “Sprawozdanie Stenograficzne, 86 Posiedzenie Sejmu w dniu 6 lutego 2015r” (2015), 251.

52 Mimi Schippers, “Recovering the Feminist Other: Masculinity, Femininity, and Gender Hegemony” in *Theory and Society* (March 2007): 85–102.

53 Dorit Geva, op.cit., 6.

54 Kalyani Devaki Menon, *Everyday Nationalism. Women of the Hindu Right in India* (Philadelphia: University of Pennsylvania Press, 2010).

Niesiołowska – likewise for others [*laughter in the chamber*]. Such [*bell sounds*] is the purpose of this convention. This is clear.⁵⁵

Undeniably, in order to achieve the aim of de facto equality of men and women, the state must undertake campaigns and educational projects which are aimed at eliminating stereotypes, unfairness and other elements of what the convention calls “unequal power relations”. The educational aspect was attacked by all of PiS’s MPs, with Zbigniew Girzyński labelling such an approach the greatest danger as the convention transformed “the model of society”.⁵⁶ During the debate, MPs attacked Małgorzata Fuszara, the Civic Platform appointee to the Government Plenipotentiary for Equal Treatment, and the financial resources spent by the state on her division’s projects (Kempa).⁵⁷ Among the key questions raised by Ludwik Dorn during the discussion over the vote were those related to these very aspects of the convention.⁵⁸ The MP inquired about the financing of education and NGO campaigns that endorse gender equality. In fact, Articles 12 and 13 of the convention call for the “eradication” of customs and traditions which are based on belief in the inferiority of women.

This is also the reason why female right-wing members were there to legitimize the condemnations of the boost given to the issue of women’s rights by the legal provisions of the convention. Their role was to mock the gendered aspects of violence in Polish society. The convention places upon governments an obligation to “ensure that culture, custom, religion, tradition or so-called honour shall not be considered as justification for any acts of violence” within its scope. This is exactly what the ornate, yet bizarre speeches were aimed to defend.

Clearly, the elephant in the room during the parliamentary elections back in 2015 was the Catholic Church. The Polish bishops’ protest against so-called gender ideology was reported by the media around the world. In a pastoral letter issued by Poland’s Bishops’ Conference in 2013, the representatives of the Catholic Church called out gender ideology as Marxist and thus destructive. Unquestionably, the letter distorted not only the definition of gender but also problems related to gender disparity. According to the letter, “gender ideologists” claim that “humans can freely determine whether they want to be men or women”, which certainly is not the idea inherent in the term.⁵⁹ This was just the beginning, and it was followed by an avalanche of statements by the Catholic Church attacking gender studies, women’s equality and the rights of the LGBT community. Characteristically, all these statements are alarmist in tone and use the straw man tactic of distorting the arguments of those advocating for more equality and calling for rights for the LGBTQ community. For example, on 28 September 2019, Archbishop of Kraków Marek Jędraszewski, in a pastoral letter, repeated the distorted claims about Polish women’s fight for parity, fairness and equality but also confronted the LGBTQ community, adding that the fight for their rights was a “totalitarian practice” in which Catholic Poles are not only forced to “promote” the inclusion of the LGBTQ community but are also becoming second-class citizens if they disagree.⁶⁰ Such statements are misrepresenting the struggles of the LGBTQ community, and, what is worse, they are also stigmatizing its members. Furthermore, not only are these accusations not fact-based but they are also generating the very problems they claim to address, such as the assault on human dignity.

55 Beata Kempa, “Sprawozdanie Stenograficzne, 86 Posiedzenie Sejmu,” 251.

56 Zbigniew Girzyński, “Sprawozdanie Stenograficzne, 86 Posiedzenie Sejmu,” 251.

57 Beata Kempa, *ibid.*, 257.

58 Ludwik Dorn, *ibid.*, 257.

59 Bishops Conference of Poland, “Pastoral Letter” (December 2013), accessed August 2020: <https://episkopat.pl/pastoral-letter-of-the-bishops-conference-of-poland-to-be-used-on-the-sunday-of-the-holy-family-2013/>.

60 Marek Jędraszewski, “Totus Tuus” (2019), accessed July 2020 <https://diecezja.pl/aktualnosci/totus-tuus-modlitewny-maraton-za-kosciol-i-ojczyzne/>.

PiS MPs like to present themselves as defenders of Christianity. The defence of Christianity or even Christian civilization is also a popular leitmotif of the right wing and the Far Right.⁶¹ The word “civilization” was used at least ten times in the debate over the Istanbul Convention. The idea of gender equality was presented as the reason for the moral decay of Western Europe. Beata Kempa attacked Sweden as an example of a country that had destroyed the traditional division of roles, which, according to her, led to social disarray.⁶²

In March 2015, the presidential candidate, Andrzej Duda strongly rejected the convention, saying that it was “exceptionally devious”, given that it the introduced “ideas which do not exist within our tradition”: “If I win the elections, I won’t ratify this convention. The category of gender does not exist within Polish law, and most people, commonsensically, realize that nature determines gender and not some sociocultural considerations.”⁶³ What is under attack here is the idea that men and women are equal because gender equality is the first stepping stone in the process of dismantling other inequalities, which are the basis not only of male power in and outside of Polish homes but other institutions within Polish society. Because the Catholic Church is the most powerful ally of the right wing and the Far Right in Poland, this is unlikely to change in the near future.

Conclusion: Symbolic Validation, Women and Populism

The misnomer “illiberal democracy” can be seen as a rhetorical tool that is applied to mask a political order rooted in the suppression of equality, not only among men and women but in all social relations more broadly. Because Poland does not have a substantive migrant community, the enemy that all populists need had to be invented. And “feminists” (i.e., all women who have independent social standing), as well as members of the LGBTQ community, are a perfect fit. Obviously, this kind of antagonistic argument works rather well and the “traitors” of the national cause, such as free-thinking women, liberals, immigrants and the LGBTQ community, are successfully pilloried as those whose very existence within the political community should be a cause for concern. What is at stake here is the very order of the state. The fight to define the “right” standards of morality and “authentic” cultural traits which are acceptable within the Polish nation aims to impose a unified vision of society. In such a vision, any dissent or difference is considered an obstruction of national unity. This, in turn, allows enforcement over what is legitimate within the political system and so what should be legal. The project of the Fourth Republic currently in the making tacitly imposes a new social contract. One that is based on Catholic norms and values. Those who oppose are not considered members of the “nation”, and so their status within the political community becomes precarious. Only “authentic” Poles, that is, those who internalize these norms and values, can be considered legitimate members. The normative project of “authentic” Poles places the reproduction of nation within the family at its centre and so, integrates Catholicism, discipline and biological reproduction of the population.

The alleged nihilism of the “liberal elites” is portrayed as a danger to national sovereignty. Europeanization of Poles is painted as a treacherous and naïve political dream which should be undercut at all costs. Consequently, in such a rendering of social disorder, women’s freedoms and rights take centre stage. The preservation of social hierarchies is the key aim of the attack on women’s reproductive rights and, more broadly, on women’s position in society. Clearly, the dismantling of women’s rights is

61 Zbigniew Girzyński, *ibid.*, 257. Typically, the Polish right wing quite openly expresses racist views. Poles are seen as the only defenders of Christianity in the Western world against the onslaught of liberalism. Such views are quite often expressed by the EMP Ryszard Legutko in the European Parliament. See, for example, <https://thepointmag.com/politics/the-demon-in-democracy/>.

62 “Sprawozdanie Stenograficzne, 86 Posiedzenie Sejmu w dniu 6 lutego 2015r” (2015), 256.

63 *TVN24* (March 15, 2015), accessed August 2020, <https://tvn24.pl/polska/konwencja-antyprzemocowa-duda-konwencja-niebezpieczna-i-perfidna-ra524325-3296085>.

only the first step, but the most critical one. It is difficult to imagine an authoritarian political system in an egalitarian society; hence, in order to make the authoritarian state a reality, those supporting this extreme project must dismantle any attempts to create equal opportunity. This is why, as in the above quote, gender equality is presented as “nihilism” and progressives are vilified. Social modernization would inevitably change the model of nationalism based on militarism, hierarchy and dreams of domination currently being promoted by PiS. Hence, the so-called culture war is aimed at obstructing the social modernization set off by access to the European Union.

The backlash against gender equality can be, paradoxically, seen as a success story of the progressives within Polish society. The vehement attack on “gender ideology” and the LGBTQ community is a testimony to the powerful social changes that access to the European Union set in motion. These social changes are part of the social modernization programme advocated for by Polish intellectuals and social activists since the First Republic. This unfinished (or even partially neglected) project can only succeed if those agents within society who are pro-democratic get enhanced financial assistance and international political support. The Far Right is well aware of that fact, hence NGOs fighting discrimination and educational campaigns for a more equal society, especially within the educational system, are under attack. What we are witnessing in present day-Poland is a deadly fight over different visions of state and society. These two are intertwined and women’s rights are the key to this entanglement.

Finally, the hierarchical vision of social order and traditional authority promulgated by the Far Right enjoys popularity not only because of the clash between different visions of political community but also owing to the failure of the Third Republic to provide security and stability. These are sought after within the traditional structures and networks of Polish society. Poles have never experienced the benefits of a more equal society, which the Third Republic had never been. This is not a novel insight and has already been identified by David Ost in his seminal work *The Defeat of Solidarity. Anger and Politics in Post-communist Europe*.⁶⁴ Given that these arguments are not new, I will not restate them here. However, I would like to point out that gender equality, which was not addressed by Ost, is related strictly to economic development, to which hundreds of studies give evidence.

In her essay *Capitalism vs. Climate*, Naomi Klein points out that the rise of the alt-right or radical right-wing in many countries across the globe, coupled with the rise of inequality, will only be accelerated by the climate crisis. The attack on “gender equality” is not fortuitous. The matter of a more balanced society, where there is less, not more hierarchy, is, in the conditions of the current climate challenge, literally, a matter of life or death. Surely, authoritarian leaders will not care for more equality, not among men and women nor within society more broadly. It is not a coincidence that the Polish Catholic Church, in its controversial pastoral letters, combines attacks on the environmentalist movement with the fight for women’s equality and the LGBTQ community. This is why, as Klein points out, progressives must promote not only a “New Deal” strategy but also must encourage the very worldview authoritarians try to suppress. This worldview rests on “interdependence rather than hyper-individualism, reciprocity rather than dominance, and cooperation rather than hierarchy”.⁶⁵ Women’s empowerment is the key, and this is why the discourse of gender ideology will remain a major weapon of the Far Right in the future.

64 David Ost, *The Defeat of Solidarity. Anger and Politics in Post-communist Europe* (Ithaca, NY: Cornell University Press, 2012).

65 Naomi Klein, “Capitalism vs. Climate,” in *The (Burning) Case for a Green New Deal* (New York: Simon and Schuster, 2019), 98.

In the Name of the Family: The Populist Turn against Gender in Hungary

ROBERT SATA

In his first interview on national radio following his third consecutive electoral victory in April 2018, Hungarian Prime Minister Viktor Orbán declared he wants to have a “comprehensive deal” with women for the next thirty years. Putting women in the centre of his government programme came as a surprise. After all, Orbán had declared previously that he does not deal with “women’s issues”. What is less surprising is the deal offered to women that only reconfirms denial of their equality and autonomy: Orbán wants Hungarian women to bear more children in exchange for extra government funds, a preferential credit and a life-long personal tax exemption for women with four children or more. Yet, the deal is only for women below forty, and couples must be married to qualify for family loans of more than \$30,000, which are written off should they have three children or use the cash incentive to buy large seven-seat family vehicles.¹ For Orbán, childrearing, although it should be a personal choice, is simultaneously the most important issue for the national community and the only way to ensure Hungarian hegemony of the Carpathian Basin, to avoid economic decline and to prevent the Islamization of Europe.

The repoliticization of gender politics has been on the political agenda ever since Orbán came to power in 2010. Leading the wave of anti-democratic and anti-European developments in Europe, Hungary is also at the forefront of attacks on feminism and gender equality due to the radical, populist and nationalist shift² in the political discourse of Orbán’s “illiberal democracy”.³ Using a systematic discourse analysis of Orbán’s speeches from 2010 to 2018, this chapter examines the creation of this new discourse, which is not only right-wing populist in being anti-establishment, anti-elite or anti-Europe⁴ but also increasingly ethnocentric in being anti-migrant. It uses the Christian religion to define itself as anti-Muslim⁵ and supports traditional family models, conservative values and pro-natalist preferences that only strengthen opposition to gender and sexual equality.

This heavily family-centric rhetoric of the Fidesz government leads to a peculiar construction of gender relations where women’s role is limited to the nation’s biological reproduction. The result is a discourse of social and religious conservatism from the nineteenth century that contests gender equal-

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- 1 Viktória Serdült, “Challenging Orbán’s Echo Chamber. Against the Odds a New Mayor from an Opposition Party Has Come to Power in Budapest. We Report on His Promises to Push Back against Orbán,” *Index on Censorship* 48, no. 4 (2019).
 - 2 See, for example, “Hungary’s ‘Illiberalism’ should not go unchallenged,” *Washington Post*, August 16, 2014; Honor Mahony, “Orbán wants to build ‘illiberal state,’” *EUObserver*, July 28, 2014; “Orbán the Unstoppable,” *The Economist*, September 27, 2014.
 - 3 Csaba Tóth, “Full Text of Viktor Orbán’s Speech at Băile Tuşnad (Tusnádfürdő) of 26 July 2014,” *The Budapest Beacon* 29 (2014).
 - 4 Rogers Brubaker, “Between Nationalism and Civilizationism. The European Populist Moment in Comparative Perspective,” *Ethnic and Racial Studies* 40, no. 8 (2017): 1191–1226.
 - 5 Only about 16% of people attend church on a weekly basis, and no major party is religious. At the same time, there is the Christian Democratic People’s Party (KDNP; Kereszténydemokrata Néppárt), but it is insignificant. Nevertheless, Fidesz – governing together with KDNP – has been preferred by Christian churches since the 2000s, and Prime Minister Orbán has on numerous occasions identified himself as a Christian (Calvinist) believer (András Bozóki and Zoltán Ádám, “State and Faith. Right-Wing Populism and Nationalized Religion in Hungary,” *Intersections* 2, no. 1 [2016]).

ity and goes as far as the banning of gender studies programmes in the country. The importance of the heteronormative family is reified together with the perpetuation of traditional values,⁶ leading to the (re)creation of a strong patriarchy in the name of preserving the nation, which also segregates along lines of class and race/ethnicity.⁷ In this way, Orbán's discourse makes possible state-sponsored anti-gender mobilization and anti-feminism since the declared supremacy of the nation and the national interest over the individual not only favours the adoption of majoritarian laws at the expense of minorities but also influences gendered norms and practices, replacing women's issues with family issues instead and thus silencing women both in public and private life.

Let us now proceed and examine how the dismantling of gender equality went hand in hand with the dismantling of democratic institutions in a country that used to be a forerunner of post-communist democratization.⁸ The first part of the text examines how discursive processes of *othering* are key for understanding how identity fears are constructed to justify radical change. This is followed by a brief background on Hungarian politics to contextualize the discourse of the prime minister that is examined in the following sections. Orbán's speeches during his second government (he was first in office from 1998 to 2002), reveal that the 2010–14 period has been dominated by the discourse of economic crisis, evoking Christian morals so as to enable Hungary's righteous fight against foreign capital. Christian morality in turn questions gender equality, prescribing women a secondary role in society. Turning to Orbán's third government in 2014–18, instead of a normalization in the discourse of the incumbent PM, we see the discourse shifts suddenly to the topic of fighting migration, portrayed as a cultural, religious and existential, civilizational threat. This results in a more radical right-wing populist and xenophobic nationalist discursive strategy that strengthens the anti-feminist aspect of the discourse – women thus become solely responsible for Hungary's demographic downturn. A brief concluding section outlines how Orbán's discourse portrays national interest as sacred and absolute, where nativist conceptions, conservative preferences, traditional values, religious moralism and ethnicized nationalism all point towards silencing women and strengthening anti-gender or anti-gay mobilization, resulting in state-sponsored anti-feminism.

Discursive Othering: Constructing "Our" Fear of "Them"

Collective identity rests upon definitions of "Us" and "Them" that are often the result of discursive processes of othering that define both the group and its enemies. Collective identity is the outcome of social contestation between and within the groups.⁹ At the same time, categories of "the people" or "the others" can be constructed with such great flexibility that some call these terms "empty vessels".¹⁰ This process of how Us vs Them are defined and conceptualized is crucial because othering serves to justify the legitimacy of political action and consequently conditions the identity formation for both Us and Them.¹¹ If the Other is portrayed as posing threats (e.g. socioeconomic, cultural, reli-

6 Eileen Boris, "Gender Troubles, Redux," *Women's History Review* 28, no. 4 (2019): 686–691.

7 Eszter Zimanyi, "Family b/Orders: Hungary's Campaign for the 'Family Protection Action Plan'," *Feminist Media Studies* 20, no. 2 (2020): 305–309.

8 Zsolt Enyedi, "Populist Polarization and Party System Institutionalization: The Role of Party Politics in de-Democratization," *Problems of Post-Communism* 63, no. 4 (2016): 210–220.

9 Rawi Abdelal et al., "Treating Identity as a Variable. Measuring the Content, Intensity, and Contestation of Identity," Presented at the APSA, San Francisco, 2001.

10 Cas Mudde and Cristóbal Rovira Kaltwasser, "Exclusionary vs. Inclusionary Populism: Comparing Contemporary Europe and Latin America," *Government and Opposition* 48, no. 2 (2013): 147–174.

11 Sune Qvortrup Jensen, "Othering, Identity Formation and Agency," *Qualitative Studies* 2, no. 2 (2011): 63–78.

gious or criminal threats), this will result in clear blame attribution.¹² Blame attribution can justify exclusionist policies, extreme measures or the denial of rights that are at the centre of illiberal politics, challenging liberal equality for the sake of protecting the community. Following this logic, the denial of recognition for minorities is coupled with radicalized inclusionary and exclusionary criteria that oppose liberal and pluralistic democracy.¹³

Since political discourses present a constant struggle between competing notions of identity, values, issues and society overall,¹⁴ they reflect a particular representation of social and political structures and practices.¹⁵ In this sense, discourses shape common understandings in a process that can be characterized as the intersubjective construction of meaning.¹⁶ Political discourse is thus the discursive construction of reality,¹⁷ where ideational interpretations are more important than empirical facts.¹⁸

The radical Right understands democracy as a principle that has, as its central feature, "a myth of a homogeneous nation, a romantic and populist ultra-nationalism, which is directed against the concept of liberal and pluralistic democracy and its underlying principles of individualism and universalism".¹⁹ Others have identified the radical Right as standing for nativism and authoritarianism in ideology.²⁰

In turn, right-wing populism "pits a virtuous and homogeneous people against a set of elites and dangerous 'others' who are together depicted as depriving (or attempting to deprive) the sovereign people of their rights, values, prosperity, identity and voice".²¹ Right-wing populism combines "the revolutionary impulse of populism" with nationalism,²² an ideology that values membership in the nation (an imagined community) above all other groups²³ and claims that national and political borders should coincide.²⁴ In this sense, nationalism, at its core, is about othering since issues of inclusion and exclu-

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- 12 Cecil Meeusen and Laura Jacobs, "Television News Content of Minority Groups as an Intergroup Context Indicator of Differences between Target-Specific Prejudices," *Mass Communication and Society* 20, no. 2 (2017): 213–240.
 - 13 Péter Krekó and Gregor Mayer, "Transforming Hungary—Together? An Analysis of the Fidesz–Jobbik Relationship," in *Transforming the Transformation? The East European Radical Right in the Political Process*, ed. Michael Minkenberg (London: Routledge, 2016), 183–205.
 - 14 John S. Dryzek, *The Politics of the Earth. Environmental Discourses* (Oxford: Oxford University Press, 2013).
 - 15 Ruth Wodak, *Gender and Discourse* (London: Sage, 1997); Ruth Wodak and Gilbert Weiss, "Analyzing European Union Discourses: Theories and Applications," in *A New Agenda in (Critical) Discourse Analysis: Theory, Methodology and Interdisciplinarity*, ed. Ruth Wodak and Paul Anthony Chilton (Amsterdam: John Benjamins, 2005), 121–135.
 - 16 Thomas Christiansen, Knud Erik Jorgensen, and Antje Wiener, "The Social Construction of Europe," *Journal of European Public Policy* 6, no. 4 (1999): 528–544.
 - 17 Michelle M. Lazar, ed., *Feminist Critical Discourse Analysis: Gender, Power and Ideology in Discourse* (London: Palgrave Macmillan UK, 2005).
 - 18 Michelle M. Lazar, "Gender, Discourse and Semiotics: The Politics of Parenthood Representations," *Discourse & Society* 11, no. 3 (2000): 373–400.
 - 19 Michael Minkenberg, "From Pariah to Policy-Maker? The Radical Right in Europe, West and East: Between Margin and Mainstream," *Journal of Contemporary European Studies* 21, no. 1 (2013): 337.
 - 20 Cas Mudde, *Populist Radical Right Parties in Europe* (New York: Cambridge University Press, 2007).
 - 21 Daniele Albertazzi and Duncan McDonnell, "Introduction: The Sceptre and the Spectre," in *Twenty-First Century Populism*, ed. Daniele Albertazzi and Duncan McDonnell, 11; Mudde and Rovira Kaltwasser, "Exclusionary vs. Inclusionary Populism."
 - 22 Erin K. Jenne, "Is Nationalism or Ethnopolitics on the Rise Today?" *Ethnopolitics* 17, no. 5 (2018): 546.
 - 23 Benedict Anderson, *Imagined Communities: Reflections on the Origin and Spread of Nationalism* (London: Verso Books, 2006).
 - 24 Ernest Gellner, *Nations and Nationalism* (Ithaca: Cornell University Press, 1983).

sion are central to the formation of the nation. Similarly, for right-wing populism, othering is the way “We” is defined – by excluding Them.²⁵

Right-wing populists often combine ethnicity with religion in defining the Self and the Other.²⁶ Religious symbols, ideals or feelings of belonging are purposefully selected to legitimize claims to political authority; yet, most analysts agree that, while churches speak of faith, right-wing populists are interested in identity – their understanding of Christian identity promotes a romanticized ideal of the national community in some golden age, uncorrupted by elites or Others. At the same time, gender mainstreaming and sexual equality become threats to the traditional Christian community.²⁷

In this way, the concept of gender has been appropriated and integrated into populists’ anti-establishment discourse, claiming there is a “gender agenda” to be imposed on “the people”.²⁸ The counter-term to gender and sexual equality is often the “family”, which pursues its secularizing trajectory²⁹ since family is seen as “providing continuity with the past” that nationalism demands.³⁰ As this chapter shows, for Orbán’s populist drift to illiberal authoritarianism, women’s sexuality and its role in the nation’s biological reproduction³¹ become as important as the creation and maintenance of boundaries for the national community, be that real or imagined.

Methods and Data

The absolute power Orbán enjoys over his party, Fidesz, makes him the primary author of Hungarian public discourse – he has an ultimate say in any policy matter. This text looks at Orbán’s speeches delivered during his second and third government³² and compares the two periods to see if staying in office induced any substantial change – in accordance with claims that populists consolidate their discourse once they become the new elite. All speeches are available on the government website and have been translated into English.³³ While the texts contain all types of speeches, statements and interviews, I treat all texts the same for the purposes of analysis. One important note is that while for the 2010–14

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- 25 Ruth Wodak, “‘Doing Europe’,” in *Discursive Constructions of Identity in European Politics*, ed. Richard C. M. Mole, Language and Globalization (London: Palgrave Macmillan UK, 2007), 70–94; Wodak, “Discourses in European Union Organizations,” Nira Yuval-Davis, “Gender and Nation,” in *Women, Ethnicity and Nationalism: The Politics of Transnationality*, ed. Rick Wilford and Robert L. Miller (London and New York: Routledge, 1998), 23–35; Andreas Wimmer, “Dominant Ethnicity and Dominant Nationhood,” *Rethinking Ethnicity: Majority Groups and Dominant Minorities*, ed. Eric P. Kaufmann (London: Routledge, 2004), 40–58.
 - 26 Daniel Nilson DeHanas and Marat Shterin, “Religion and the Rise of Populism,” *Religion, State and Society* 46, no. 3 (July 3, 2018): 182.
 - 27 Mieke Verloo and David Paternotte, “The Feminist Project under Threat in Europe,” *Politics and Governance* 6, no. 3 (2018): 1–5; Isabelle Engeli, “Gender and Sexuality Research in the Age of Populism: Lessons for Political Science,” *European Political Science* 19, no. 2 (2020): 1–10.
 - 28 Agnieszka Graff, Ratna Kapur, and Suzanna Danuta Walters, “Introduction: Gender and the Rise of the Global Right,” *Signs: Journal of Women in Culture and Society* 44, no. 3 (2019): 541–560.
 - 29 Isabelle Engeli, Christoffer Green-Pedersen, and Lars Thorup Larsen, eds., *Morality Politics in Western Europe: Parties, Agendas and Policy Choices* (London: Palgrave Macmillan UK, 2012).
 - 30 Gail Kligman and Susan Gal, *Reproducing Gender: Politics, Publics, and Everyday Life after Socialism* (Princeton: Princeton University Press, 2000), 68.
 - 31 Kligman and Gal, *Reproducing Gender*; Floya Anthias and Nira Yuval-Davis, *Woman-Nation-State* (London: Palgrave Macmillan UK, 1989); Anne McClintock, “Family Feuds. Gender, Nationalism and the Family,” *Feminist Review* 44, no. 1 (1993): 61–80.
 - 32 Orbán was first in power from 1998 to 2002.
 - 33 However, it seems the English translation is toned down, as the Hungarian version on occasion uses more radical expressions. See <http://www.kormany.hu/en/the-prime-minister/the-prime-minister-s-speeches>.

government cycle there are a total of 142 speeches and interviews, for 2014–18 there are 423. The speeches are numbered chronologically, starting with the 2010 election victory speech.

Democratic Backsliding in Hungary

The 2010 victory of Orbán's Fidesz brought an illiberal and anti-democratic turn to Hungarian politics, breaking down the institutions of the post-communist status quo. Hungary used to be a model case for accommodating cultural diversity through minority protection and group-specific rights,³⁴ yet public opinion polls have shown that chauvinism and xenophobia among ordinary Hungarians are common,³⁵ and radical right parties also have support.³⁶ Orbán opposes multiculturalism and is in favour of an ethnic nation. Similarly, though post-regime change Hungary is largely secular, the guarantees of religious freedom and state neutrality³⁷ are now challenged by Fidesz, which uses religious symbols in an eclectic way to serve a romantic myth of a homogeneous nation in a golden age, making religion instrumental to the party strategy.

Following its electoral victory, to signal a break with the past, Fidesz adopted a new constitution (called the Fundamental Law) that defines Christianity as a force that preserves "nationhood"³⁸ and includes a passage on the protection of life from conception. It also defines the family as the marriage of a man and a woman (heterosexual) and/or as the relationship between parents and children (reproductive), with families being the basic unit of the nation. The constitution also divides the political community into Us and Them – those who do not belong to Christianity or the ethnic nation or who refuse to vow fidelity to the will of the majority see their rights infringed.³⁹

Gender equality or domestic violence against women are problems that have plagued post-regime change Hungary, characterized by essentialized gender and sexual norms. Hungary's patriarchal society was left unchallenged even during socialism as men's superior position within the spheres of politics, work and the family was preserved.⁴⁰ While feminism or gender equality have never been on top of

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- 34** Multicultural minority accommodation was a conscious liberal policy to serve as a model for neighbouring countries, host states of co-ethnic Hungarians as a result of World War I Hungary having lost two-thirds of its territory and a third of its people to its neighbours. (Nándor Bárdi, "Magyarország És a Kisebbségi Magyar Közösségek 1989 Után," *A Múlt Jelene–a Jelen Múltja. Folytonosság És Megszakítottság a Politikai Magatartásformákban Az Ezredforduló Magyarországon*, Társadalomtudományi Kutatóközpont Politikatudományi Intézet, October 26, 2012 [2013]: 40–96).
- 35** E.g. Bori Simonovits, Anikó Bernát, Blanka Szeitl, Endre Sik, Daniella Boda, Anna Kertesz, FM Tóth, and J Barta, *The Social Aspects of the 2015 Migration Crisis in Hungary*, Vol. 155 (Budapest: Társadalomtudományi Kutatóközpont, 2016), 41.
- 36** The first such party, the Hungarian Justice and Life Party (MIÉP Magyar Igazság és Élet Pártja), passed the 5% parliamentary threshold with a pan-Hungarian agenda open to racism and anti-Semitism (see Minkenberg, "From Pariah to Policy-Maker?"). Jobbik (the name in Hungarian implies both "better" and "more to the right") became popular with an agenda of fighting "gypsy crime" (Gergely Karácsony and Dániel Róna, "The Secret of Jobbik. Reasons behind the Rise of the Hungarian Radical Right," *Journal of East European & Asian Studies* 2, no. 1 [2011]) and the founding of a paramilitary wing, the Hungarian Guard Movement (András Bíró Nagy, Tamás Boros, and Zoltán Vasali, "More Radical than the Radicals: The Jobbik Party in International Comparison," in *Right-Wing Extremism In Europe: Country Analyses, Counter Strategies and Labor Market Oriented Exit Strategies*, ed. Ralf Melzer and Sebastian Serafin [Berlin: Friedrich Ebert Stiftung, 2013], 229–53).
- 37** Zsolt Enyedi, "The Contested Politics of Positive Neutrality in Hungary," *West European Politics* 26, no. 1 (2003): 161.
- 38** Note that the 2012 Church Act allows the government to pick and choose among churches to officially recognize, see Enyedi, "Paternalist Populism and Illiberal Elitism in Central Europe," *Journal of Political Ideologies* 21, no. 1 (2016): 16–17.
- 39** Balázs Majtényi, Ákos Kopper, and Pál Susánszky, "Constitutional Othering, Ambiguity and Subjective Risks of Mobilization in Hungary: Examples from the Migration Crisis," *Democratization* 26, no. 2 (2019): 173–189.
- 40** Éva Fodor, *Working Difference: Women's Working Lives in Hungary and Austria, 1945–1995* (Durham: Duke University Press, 2003).

the Hungarian agenda, positive developments in gender equality took place within the EU accession, but gender mainstreaming was weakly institutionalized. Notwithstanding this, there has been hostility towards gender issues centred around three discourses: First, the media discourse in the 1990s considered feminism an “alien intruder” brought about by Americanization. The second discourse coupled anti-communism to feminism as a legacy of the “old ideology”. Finally, the third discourse of anti-feminism is connected to ideas of a “women’s way of knowing” that considers feminists to be imposing a man-hating, lesbian agenda.⁴¹ Since 2010, although the anti-gender discourse gained momentum only later – following the debate in the wake of the EU Estrela and Lunacek reports in 2014⁴² – there has been a setback in all areas of gender equality, and the only consultative body dealing with gender issues (the Council for Social Equality among Women and Men, set up in 2000) has been disbanded.⁴³ These all suggest that the foundations upon which Orbán built his illiberal politics had been long present before 2010.⁴⁴ The following pages show how Orbán has built his discourse on these foundations by combining societal identity fears, right-wing populist strategies, nationalism and religion as well as a masculine worldview to rally support for his illiberal politics.

2010–14: Traditionalist Families to Fight Economic Crisis

A quick overview of the discourse of the second Orbán government (2010–14) shows that the main theme is the economic crisis that hit Hungary particularly hard. The most often used references are crisis, the Hungarian economy, markets and the need to protect Hungary and Hungarians (see Appendix for keywords). All speeches focus solely on Hungary and the Hungarians; foreigners, aliens, migration or immigration as terms are barely mentioned at all. In contrast, the European Union and other European countries are mentioned as often as Hungary since, according to Orbán, Hungary must fight the EU and Western countries in its quest to overcome its crisis. In portraying the EU as siding with foreign capital, the EU thus becomes identified with the Other, a traitor using double standards against Hungary despite the country being part of Europe: “We accept the common moral standards of European cultural nations, but we will not accept double standards.”⁴⁵

Economic Grievance-based Populism

All of the above suggests Orbán’s discourse deals solely with Hungarian identity in economic terms and the economic crisis as a threat to this economic Self. Despite posing as a saviour of Hungarians, ethno-cultural references are largely missing from the discourse, Orbán barely mentions Hungarian ethnicity, culture and tradition. Similarly, there is no talk about religion or churches except for the speeches addressed to specific church authorities, although references to Christianity abound. Similarly, while women are barely mentioned, talk on the family and the need to protect families is often at the centre of the speeches.

In this economic identity-based politics, the Others are also conceived of in financial terms: banks and bankers (106 mentions) and multinationals (30 mentions) represent “multinational capital” posi-

41 Erzsébet Barát, “Revoking the MA in Gender Studies in Hungary and Right-Wing Populist Rhetoric,” *L’Homme* 30, no. 2 (2019): 135–144.

42 Eszter Kováts and Andrea Pető, “Anti-Gender Discourse in Hungary: A Discourse without a Movement,” in *Anti-Gender Campaigns in Europe: Mobilizing against Equality*, ed. Roman Kuhar and David Paternotte (London–New York: Rowman and Littlefield International, 2017), 117–31.

43 Dorottya Szikra, “Democracy and Welfare in Hard Times: The Social Policy of the Orbán Government in Hungary between 2010 and 2014,” *Journal of European Social Policy* 24, no. 5 (2014): 486–500.

44 Krekó and Mayer, “Transforming Hungary–Together?” 201.

45 Orbán, Speech, 9.

tioned against the Hungarian economy. Foreign capital together with the European Union are to be blamed alongside the former socialist governments for the financial difficulties. In turn, Hungary is to stand on its own to fight this challenge by relying on its people and its resources. Hungary's new constitution is portrayed as one of the means of this solitary fight (143 mentions) – a source of trust (96 mentions) and unity (36 mentions). Emphasizing the value of nationalism, religion and traditional family values, the constitution becomes a primary means of Hungary's response to the crisis.

When it comes to other discursive strategies, Orbán's narrative relies heavily on common themes of populist discourse, such as the perception of crisis (398 mentions), threat (29 times) or lack of security (48 times). The discursive othering is best seen in the frequency of his references to "us" and "our", by far the most frequently occurring keywords in the speeches. The discourse focuses on societal identity fears to justify decisive and immediate action to protect against these fears, action that calls for "the total renewal of our homeland, Hungary; total renewal and as a result, radical reorganization within every dimension: intellectual, moral, spiritual, economic and social".⁴⁶

Other populist discursive strategies such as constant appeals to the Hungarian people or identification with the "true people" are also present in Orbán's discourse, and he claims "because I am familiar with our kind, I also know that Hungarians dislike 'spoon-fed talk'".⁴⁷ This way he speaks in the name of or for the nation, expressing popular will and claiming ultimate legitimacy as the "national voice" who knows: "What is good for the Hungarians? What is good for the Hungarian nation? What is good for the Hungarian people?"⁴⁸ Like other populists, Orbán often makes anti-elite and anti-establishment claims that grant him the possibility to distance himself from his predecessors and the establishment, to claim he is not part of the political elite but instead speaks in the name of the people, addressing their grievances: "We felt that we had been cheated, that the Hungarian people were being cheated, and through them the Hungarian Government, and then we said, let's start using a different tone of voice."⁴⁹

Christian Morality and Traditional Families to Fight Crisis

Religion is the only exception to the non-presence of cultural markers in this economy-based conception of Hungarian self-identity. Orbán refers more often to Christianity and Christian roots (175 mentions) than any other aspect of identity – even language, which Orbán thinks is the clearest distinctive sign of "Hungarianness". Nevertheless, religion or religious faith is not portrayed as a belief system but rather a source of legitimacy or morality when Orbán talks about the political and institutional changes envisioned or enacted. Christianity is thus a source of moral values, traditional norms and directives, which are much needed to renew Hungary and fend off the crisis. Orbán claims the economic crisis is due to a moral crisis, caused in turn by the diminishing role of Christianity in Europe and blamed on Brussels: "When constructing Europe we began to be ashamed of our Christian roots and to neglect them along with our moral and cultural traditions."⁵⁰ This way, the entire capitalist system is not only unjust, but the credit system (that led to the crisis) is considered immoral too: "The loans which our countries are suffering from no longer have any relation to any kind of moral principle."⁵¹

46 Orbán, Speech, 15.

47 Orbán, Speech, 26.

48 Orbán, Speech, 14.

49 Orbán, Speech, 129.

50 Orbán, Speech, 33.

51 Orbán, Speech, 15.

This way, Hungary with its “Christian moral principles” not only has a “strong moral identity”⁵² but a duty to oppose immoral multinational capital and its supporters.

The discourse stresses the religious foundation of morality-based politics since “important things – work, credit, family, nation – have become dissolved from the moral foundations that Christianity provided to us”.⁵³ Using this logic, the Fidesz government has not only enshrined “the family” as a marriage between a man and a woman into the constitution but it also clearly defines the role of women in its vision for Hungary and the ideal Hungarian family – they should stay at home to rear enough children to form a strong Hungarian nation.⁵⁴ This is because, for Orbán, the demographic downturn in Hungary is as important as fighting the economic crisis, because it threatens the future of the community, making Hungarians “an endangered species”⁵⁵. The family is central to fighting this challenge, making it solely responsible for demographic change. “As for families: here we should say a straightforward sentence. A community, that is unable to sustain itself biologically will not survive and does not deserve it either.”⁵⁶ Moreover, parents are responsible for the success of their children – mainly mothers, who are seen as the caretakers of the family.⁵⁷

While Orbán shifts responsibility for demographic change away from his government, he blames the former Hungarian governments together with the EU for the country’s demographic downturn. First, his political opponents are charged with taking away “one year of maternity benefit”,⁵⁸ and adopting policies that made “more and more people live not for their children, but off their children and off the benefits received because of their children”.⁵⁹ Secular and liberal EU and its gender equality norms are blamed second “because the family is under constant attack, and many view raising a family as something that is in the way of self-fulfilment”.⁶⁰ Although Orbán himself admits that Hungary is among “those European countries in which the willingness to have children is lowest”, he blames modern lifestyles challenging traditional values because “the reduction of family communities based on stable commitments” in turn results in a society where “the proportion of children born outside wedlock is 42 percent, and the age of women at the birth of their first child is 30”.⁶¹ Although the sanctity of marriage and family understood as “a man and a woman, and one of each”, annuls the rights of LGBT people, Orbán claims “this is not directed against anybody”⁶² because Hungarians are “a people with a very family-centric and child-centric way of thinking”.⁶³ In contrast to secular, gender-equal or sexually non-discriminating Europe, Orbán claims “studies show that young people would like to have

52 Orbán, Speech, 38.

53 Orbán, Speech, 15.

54 Nicole V.T. Lugosi, “Radical Right Framing of Social Policy in Hungary: Between Nationalism and Populism: Between Nationalism and Populism,” *Journal of International and Comparative Social Policy* 34, no. 3 (September 2, 2018): 226.

55 Orbán, Speech, 90.

56 Orbán, Speech, 63.

57 Orbán, Speech, 42.

58 Orbán, Speech, 39.

59 Orbán, Speech, 110.

60 Orbán, Speech, 15.

61 Orbán, Speech, 15.

62 Orbán, Speech, 50.

63 Orbán, Speech, 90.

more children⁶⁴ but economic difficulties prevent this from happening, so “demographically motivated family policies are essential and legitimate”.⁶⁵

Although the Fidesz government introduced family taxation, extended parental leave and promised support for working mothers, such as “community childcare and possible community child raising, such as nurseries and kindergartens”,⁶⁶ it would be wrong to assume Orbán supports the emancipation of women. His sexism comes to light when he recalls that “the Creator was aware of the fact that it was not good for man on his own, and so he created man and woman, and as such practically speaking he created the family”.⁶⁷ Yet, women are not only supposed to ensure what is “good for a man” but they should also focus on the family, which is mainly their responsibility. As such, even Fidesz’s preferential retirement programme for women, in fact, only reinforces gender inequality since women gain this benefit only to work more as “family caretakers”: “Women can now retire after 40 years of registered employment. This, in addition to the fact that they obviously deserve it, is also an opportunity for them to spend more time with their families, and especially with their children and grandchildren. And so I think that this enables an important opportunity to strengthen family ties.”⁶⁸

All the above suggests a right-wing, populist reconceptualization of the (true) people of the nation. The discourse is abundant in right-wing, populist themes, yet nationalism frames are less present as the discourse is solely focused on an economic understanding of the world. Nevertheless, the speeches often refer to Christianity as a cultural marker. The same Christian roots and support for traditional values give Hungary a strong moral identity and legitimacy in its economic fight and its attempt to reverse the demographic decline by strengthening the family – at the expense of opportunities for women who are relegated to care for children and the family. The discourse is anti-elite, anti-establishment and anti-European, and it predicates that no critics of this approach can be considered part of the “true people”. Supporters of the European Union or liberal values, critics of Christian values or traditional lifeforms, supporters of gender equality or sexual non-discrimination do not belong to this group anymore.

2014–18: The Fight against Muslim Migrants and Liberal Critics

Turning to the 2014–18 period and the third Orbán government, we notice a major turn in Orbán’s political discourse, starting in 2015, that is solely focused on migration. This is a sudden change as issues of migration, refugees, asylum seekers or immigration had been absolutely ignored in the previous cycle. Now these issues become the main topic – 180 of the 422 speeches. Moreover, Orbán first spoke against migration in February 2015, well in advance of the European refugee crisis in the summer of the same year when 350,000 refugees passed through the country on their way to Western Europe. Migration becomes Orbán’s new nemesis as it brings “people, many of whom are unwilling to accept European culture, or who come here with the intent of destroying European culture”.⁶⁹ The primacy of the anti-migration topic is still preserved in 2018 even though Hungary had built a fence three years prior, in 2015, keeping refugees out of the country. Moreover, Orbán’s discourse only radicalizes further over the years, to the extent that he is willing to break taboos – yet another populist discursive

64 Orbán, Speech, 87.

65 Orbán, Speech, 63.

66 Orbán, Speech, 90.

67 Orbán, Speech, 97.

68 Orbán, Speech, 129.

69 Orbán’s State of the Nation Address, 27 February 2015, Budapest.

strategy⁷⁰ – claiming that although it is forbidden to talk about it openly “immigration brings crime and terrorism to our countries”⁷¹.

Migration as Nemesis of the Nation and the Family

More importantly, in this new discourse, the Other is reconceptualized: Instead of neoliberal international capital, it is now portrayed either as the image of “the migrant” or the European Union and the shared European refugee system. Domestic organizations that help migrants are also defined as enemies. Part of this reconfigured process of othering is the fact that the number of mentions of the EU and European countries, portrayed as supporters of migration increase, and the EU, is blamed for bringing migration to Hungary: “Brussels must not have the power to forcibly resettle here people whom we do not want to live together with.”⁷²

The image of crisis, threat and danger remains the essence of the discourse, despite the fact that the fence stops all potential migrants at the borders of Hungary. This also demonstrates that “political crises are, by definition, constructed, and populists can have an important role in the framing-process”.⁷³ It is Orbán’s discursive strategy that ensures the image of the crisis remains central to the understanding of the Hungarian Self; the only change is that the economic threat is now replaced with threats related to migration and the alien Other who endanger cultural, religious or civilizational survival.⁷⁴

As such, this reconceptualized self-identity becomes more interwoven with language, culture and tradition – a unique civilization built on ethnic particularism. “Being a Hungarian is a mission, a task, a job of work: to maintain, strengthen and carry forward a great, lonely, thousand-year-old civilization, built on the Hungarian language and on the foundations of the Hungarian mentality, and surrounded by dissimilar nations.”⁷⁵ Yet, it is not enough that the nation is conceived on particularistic ethnic and cultural terms but Orbán and his government alone have the legitimacy to decide who can belong: “Only those who have permission from our elected parliament, government or some other official state body can enter the territory of Hungary, can settle here and live here with us; and we can say that we shall not obey anybody else’s word and shall not accept orders from anyone else who states that we must admit this person or that person.”⁷⁶

What remains constant in the post-2015 discourse is Orbán’s continuous use of the same right-wing populist political strategies that were outlined above. He often speaks in the name of the nation, using the term “we” or posturing as one of the people. In the same way, Orbán’s anti-European discourse has only strengthened since 2015. Europe, and more specifically the European Union, continues to be a threatening Other since his understanding of Hungarian identity as based on exclusionist cultural/civilizational norms and paternalist traditionalist values rooted in religion is challenged by the rational liberalism, secularism or gender equality of the European Union.

70 Benjamin Moffitt and Simon Tormey, “Rethinking Populism. Politics, Mediatization and Political Style,” *Political Studies* 62, no. 2 (2014): 381–397.

71 Orbán’s 15 March 2016 National Day speech, Budapest.

72 Orbán, Speech, 193.

73 Zsolt Enyedi, “Plebeians, Citoyens and Aristocrats or Where Is the Bottom of Bottom-up? The Case of Hungary,” in *European Populism in the Shadow of the Great Recession*, ed. Hanspeter Kriesi and Takis Pappas (Colchester: ECPR Press, 2015), 243, <http://cadmus.eui.eu/handle/1814/36489>.

74 “This change facing Europe – or which, in my opinion, is threatening Europe – can also have an effect at the deeper, civilizational layers. The identity of civilization in Europe could change.” Orbán, Speech, 251.

75 Orbán, Speech, 398.

76 Orbán, Speech, 356.

As a right-wing populist, Orbán's discourse also remains anti-elite, and he is not only against the European elite that he portrays as unrealistic because "it is sitting in a closed, ideological shell, which means it has hardly any connection to reality"⁷⁷, but he is also against the previous ruling elite in Hungary that he continues to attack for betraying the people's will: "You cannot run the life of a country by the elite closing its eyes and ears to a fundamentally important issue and ploughing ahead regardless of what the people are saying."⁷⁸ For Orbán, political leadership can only be legitimate if it speaks in the name of "the people", in the service of the national interest. In turn, only Orbán himself can claim to represent this will.

Identitarian Christianity vs Gender Equality

The reconfiguration of Hungarian self-identity in Orbán's discourse is also signalled by difference in reference to religion. While in the first cycle, he used identitarian Christianity⁷⁹ as a cultural marker, a source of moral standing and legitimacy, in the post-2015 speeches, he uses references to faith as well. Faith becomes a marker contrasting Christian religion with Islam and Muslims, portrayed as threatening to both Hungarians and Europe as a whole. "This mass population movement also coincides with an offensive by a major world religion: Islam's latest global offensive".⁸⁰

The reconfigured discourse thus employs an uneasy mix of Christianity understood as faith and Christianity seen as identity. This blurring of Christianity as religion and cultural identity is most noticeable in Orbán's fears for the fate of freedom of religion, the fight against anti-Semitism or gender equality when confronted with the spread of other religions in Europe.⁸¹ Ironically, immigration is a threat to both "our conventional European values: for families, for national communities, for church communities, for the conventional forms of child-rearing, and for the traditional family model"⁸² that are all rooted in Christianity as well as the gender mainstreaming that Orbán himself rejects. In this way, Orbán conveys a contradiction in terms: Christianity not only provides all kinds of cultural and traditional values, but it is an open, if not liberal faith that assures gender equality and freedom of religion as well as fights against anti-Semitism, unlike the "barbaric" Islam. Similarly, although he saw earlier no reason to acknowledge LGBT groups, he now claims migration would endanger "customs related to sexual relations which have evolved in European culture."⁸³ It matters little that true believers oppose gender equality or gay rights in favour of the traditional family and defend the permissiveness of differences in status between men and women, the sanctity of marriage or the pro-life versus pro-choice preference.⁸⁴

Orbán also uses the image of women in danger to substantiate the crisis Hungarians face; his government alone can ensure there will be "no gangs hunting Hungarian women, our wives and daughters".⁸⁵ At the same time, he accuses Western media of relying on the same depiction of vulnerable women, who, unlike men, need protection, saying that migrants are portrayed as "women and children, while seventy percent of the migrants are young men and they look like an army".⁸⁶ Using these images of

77 Orbán, Speech, 299.

78 Orbán, Speech, 356.

79 Roy, *Rethinking the Place of Religion*.

80 Orbán, Speech, 481.

81 Orbán, Speech, 480.

82 Orbán, Speech, 441.

83 Orbán, Speech, 264.

84 Roy, *Rethinking the Place of Religion*, 3.

85 Orbán, Speech, 324.

86 Orbán, Speech, 275.

vulnerable women on both sides of the conflict, Orbán actually recreates the inequality of the sexes in line with his masculine world view.

This is in stark contrast with what he had to say about women in the previous cycle, when women only get mentioned as mothers/grandmothers who should concentrate on the family and raising children to improve Hungarian demographics. Now, the discourse suggests that Orbán has changed his mind about the equality of the sexes: While in the 2010–14 period he never talked about gender equality, he now repeatedly equates Europe (Hungary being part of it) with “the equality of men and women”⁸⁷, and he makes statements such as “in today’s modern world women work just as much as men do”⁸⁸ or “in Hungary – as usual – women tend to be the braver sex”.⁸⁹

Yet it would be wrong to assume that Orbán became a supporter of gender equality; he only considers gender equality as self-evident when he fears it from the Muslim migrants since, in their culture, the “relationship between men and women is seen in terms of a hierarchical order”.⁹⁰ Nevertheless, these fears are insincere since the sanctity of the family cannot be challenged in Orbán’s mind, and he is ready to publicly defend the same hierarchical order for men and women: “When we started talking about the family, and we said that we were taught in school that the natural order of things is that there is a man and there is a woman who together form a couple, and they will have children, we were branded as sexist and homophobic.”⁹¹ Similarly, in his reply to a question as to why there were no women in his cabinet in 2015, he declared: “Few women could deal with the stress of politics.”⁹²

His continued preoccupation with demographic decline, which only seems to have increased with the migration crisis, also translates into Orbán’s absurd policy of “procreation over immigration”.⁹³ Though he claimed Hungarians are family-centric, Orbán now warns that migrants – and especially migrant women – are a threat “because they have higher birth rates, are more family-centered, and in some respects lead more spiritual lives than we do”;⁹⁴ thus Europe/Hungary cannot enter a demographic race.⁹⁵ While he claimed earlier that economic hardship prevented families from having more children, now that the economic crisis is no more and the blame is placed on women for the decline of the nation: “No policies of any kind can decide whether or not there will be children in a community, whether children are being born into families – and if so, how many. This is because only women can make such decisions.”⁹⁶ Putting the responsibility for the survival of the nation solely on women’s shoulders, women become solely baby-producing machines for Orbán.

Along these lines, women’s first concern should be the birth of children, and the “duty of the Hungarian government [is] to create conditions in which a family-friendly Hungary greets the birth of children and shows the greatest respect to women who decide to have children”.⁹⁷ This confirms that Orbán has no interest in gender equality and respects mothers only. Once again, Europe is blamed for not being family-friendly enough while also being composed of “family-neutral countries, or coun-

87 Orbán, Speech, 325.

88 Orbán, Speech, 336.

89 Orbán, Speech, 250.

90 Orbán, Speech, 473.

91 Orbán, Speech, 391.

92 Serdült, “Challenging Orbán’s Echo Chamber.”

93 See Zimanyi, “Family b/Orders.”

94 Orbán, Speech, 264.

95 Orbán, Speech, 336.

96 Orbán, Speech, 473.

97 Orbán, Speech, 452.

tries which completely ignore this question".⁹⁸ Similarly, Orbán claims NGOs, feminist activists, liberal thinkers – the "Soros troops" – are traitors of the national cause because they want to bring about a world that "has no definite points of reference, it is unclear who is a man and who is a woman, what family is, and what it means to be Hungarian and Christian. They are creating a third gender, they are ridiculing faith, and they regard families as redundant, and nations as obsolete."⁹⁹

Mobilization against gender or sexual equality thus equals mobilization against intellectuals, liberals and (Islamic terrorist) migrants, all accused of threatening Hungary both from the outside and within.¹⁰⁰ In this sense, gender is the "symbolic glue" representing all aspects of progressive politics, which Orbán claims have "failed the people". Others make a similar claim, that gender has entered the "war of symbols" in the populist discourse against equality.¹⁰¹ In fact, some claim that the gendered dimension is not just an element of the autocratic, illiberal transformation but central to understanding the regime.¹⁰² Instead of feminism, LGBT people or reproductive rights, it is now specifically gender as a concept that is targeted and blamed for all society's ills, well exemplified by the banning of gender studies programmes by Fidesz in 2018. While Orbán never mentions this, his ministers attack gender studies programmes claiming that "no one wants to employ a gender-ologist" and "gender studies – similarly to Marxism–Leninism – can be called an ideology rather than a science".¹⁰³

Conclusion: A New Patriarchy with State-Sponsored Anti-feminism

The analysis shows that Orbán, in his public discourse, has been using right-wing populist elements ever since he took office in 2010. Most importantly, everything in the discourse is put in the service of creating and maintaining the image of existential crises that Hungary must face. The world is Manichean, divided between the "good people" and their enemies. The only change we see is that, whereas in 2010–14 the discourse focused solely on the financial crisis, the post-2015 discourse is exclusively focused on the migration crisis. In addition to this, Hungary's demographic crisis is present in the discourse of both periods, always relegating women to the role of rearing more children for the nation – first, to help Hungary have the labour force to fight the economic crisis and, second, to ensure Hungarian hegemony in the Carpathian Basin in the face of migration.

It is the processes of discursive othering that are at the centre of the discourse, constantly redefining both the Self and the Other to justify changes that fundamentally attack rational liberal democracy embodied by minority rights, secularism, freedom of religion or gender equality and acceptance of LGBTQ groups. Orbán's discourse thus promotes right-wing populist values: the defence of national identity as opposed to equality among citizens, the protection of minorities or respect for gender or sexuality rights. He opposes liberalism, claiming it subordinates national interest to "foreign models of multiculturalism, Roma rights, LGBT rights, and refugee protection".¹⁰⁴ As follows, his discourse

98 Orbán, Speech, 448.

99 Orbán, Speech, 515.

100 Barát, "Revoking the MA in Gender Studies."

101 Simon Lewis and Magdalena Waligórska, "Introduction: Poland's Wars of Symbols," *East European Politics and Societies* 33, no. 2 (April 16, 2019): 423–34, quoted in Engeli, Green-Pedersen, and Larsen, *Morality Politics in Western Europe*, 5.

102 Weronika Grzebalska and Andrea Pető, "The Gendered Modus Operandi of the Illiberal Transformation in Hungary and Poland," in *Women's Studies International Forum* 68 (2018): 164–172.

103 Engeli, "Gender and Sexuality Research in the Age of Populism," 3–4.

104 Brubaker, "Between Nationalism and Civilizationism," 1208.

revolves around two notions: the restoration of traditional life centred on family, religion and conservative values and culture, accompanied by the idea of an essential righteous battle to be waged against all Others that are culturally or religiously different (migrants) or reject his traditionalism – feminists, liberal intellectuals, Brussels bureaucrats.¹⁰⁵

While Orbán never talks directly about gender, we have seen that he thinks of women only as baby-machines there to ensure the survival of the national community, and their role in the family is relegated to that of mothers and caretakers. In line with Orbán's discourse, neoconservative family policies have been adopted by his government. This is justified by a portrayal of the family as providing continuity with the past through the moralizing politics of reproduction, which in turn creates continuity and immortality for the individual as part of the nation.¹⁰⁶ In other words, Orbán proclaims a form of gender essentialism, and he replaces "gender mainstreaming" with "family mainstreaming".¹⁰⁷ Since the church is weak and gender mainstreaming has always been weakly institutionalized in Hungary, it is not the church or grassroots mobilization against gender¹⁰⁸ but rather the government that is responsible for the set-back in all areas of gender equality.

It is little surprise that the Orbán government has increasingly associated gender issues with the populist anti-establishment rhetoric that claims a specific "gender agenda" would be imposed on "the people".¹⁰⁹ As we have seen, gender acts as a "symbolic glue"¹¹⁰ to express various dissatisfactions and resentments towards globalization, migration, Europeanization, the previous political establishment and its elites and intelligentsia.¹¹¹ Advocates for women's movements or equal rights are thus labelled traitors of the nation and a threat to national survival,¹¹² which in turn results in (re)constructing a "new patriarchy"¹¹³ where reproduction is constructed as a national issue that women must participate in – nothing less than state-sponsored, anti-gender mobilization and anti-feminism in the name of the family.

105 Nadia Marzouki, Duncan McDonnell, and Olivier Roy, eds., *Saving the People: How Populists Hijack Religion* (London: Hurst and Publishers, 2016).

106 Kligman and Gal, *Reproducing Gender*, 68.

107 Valentine M. Moghadam and Gizem Kaftan, "Right-Wing Populisms North and South: Varieties and Gender Dynamics," *Women's Studies International Forum* 75 (July 1, 2019).

108 Kováts and Pető, "Anti-Gender Discourse in Hungary;" Serdült, "Challenging Orbán's Echo Chamber."

109 For a similar arguments see Graff, Kapur, and Walters, "Introduction," 544; Engeli, "Gender and Sexuality Research in the Age of Populism," 232.

110 Kováts and Pető, "Anti-Gender Discourse in Hungary;" Engeli, "Gender and Sexuality Research in the Age of Populism;" Grzebalska and Pető, "The Gendered Modus Operandi of the Illiberal Transformation in Hungary and Poland."

111 Barát, "Revoking the MA in Gender Studies in Hungary and Right-Wing Populist Rhetoric."

112 Anne Marie Goetz, "The Politics of Preserving Gender Inequality: De-Institutionalisation and Re-Privatisation," *Oxford Development Studies* 48, no. 1 (2020): 2–17.

113 Katherine Verdery, "From Parent-State to Family Patriarchs: Gender and Nation in Contemporary Eastern Europe," *East European Politics and Societies* 8, no. 2 (1994): 255.

Appendix – Keyword occurrence in Orbán’s speeches

	2010–2014	2014–2018
Against Hungary	10	38
Alien	1	18
Asylum	0	105
Banker	10	8
Banks	96	60
Birth	18	26
Border	90	1,281
Boundary	0	42
Breakdown	0	2
Children	137	428
Christianity	175	529
Citizenship	5	24
Civil	3	70
Constitution	118	467
Couples	1	7
Crisis	398	416
Debt crisis/ sovereign debt	5	24
Demography	8	152
Diaspora	4	47
Disintegration	15	26
Economic crisis	73	39
Elite	13	127
Ethnic	3	54
European Union	71	567
European countries	40	188
European crisis	17	0
European Union	319	1,320
Eurozone crisis	1	1
Faith	60	126
Family	148	426
Fence	0	219
Financial crisis	10	47
Foreigners	9	65
Fundamental Law	25	65
Gate	14	53
Gender	2	2

	2010–2014	2014–2018
George Soros	0	163
God	61	163
Hungarian citizen	7	50
Hungarian culture/trad.	3	69
Hungarian Diaspora Council	0	6
Hungarian economy	160	121
Hungarian family	39	60
Hungarian identity	0	3
Hungarian nation	50	122
Hungarian Stand- ing Conference	1	12
Hungarians	427	1,390
Hungarians abroad	4	55
Immigration	2	767
Islam	4	55
Islamic State	0	13
Language	73	79
Market	137	268
Migration	13	1,616
Migration/ refugee crisis	0	87
Mother	31	44
Multinationals	30	23
Muslim	0	86
National identity	5	42
National unity	3	16
NGO	3	71
Our	1,870	6,359
Our lives	38	94
People of Hungary	74	27
Pray	9	13
Protect	134	909
Protection of national interest	2	21
Refugee	3	266
Religion	34	100

	2010–2014	2014–2018
Security	48	462
Socialist	37	111
Soli Deo gloria	9	9
Soros	0	308
Sovereignty	15	149
Stand on its own	5	12
Terrorism	10	335
Threat	29	288
Trust	96	116
Unity	36	327
Woman/women	20	90
SPEECHES NUMBERED	1–142	143–565

VOX and the Emergence of the Populist Radical Right in Spain

ANDRÉS SANTANA

Introduction

The goal of this chapter is to study the emergence and consolidation of an almost newly-born populist radical right party (PRRP) in Spain called VOX.¹ Although VOX is one of the latest additions to the PRRP family, it is a highly successful one: It is currently the third largest political force in the country, and one of the largest PRRPs in Western Europe.² Moreover, it has entered all levels of representation, including the national upper and lower chambers, the Spanish delegation of European Parliament representatives, many of the regional parliaments (which wield considerable power in Spain) and hundreds of city councils, including most of the largest municipalities in the country.

Due to the novelty of its success, research on VOX is still in its infancy, and most of our knowledge of the party is hitherto based on works published in political blogs or the press. Moreover, many of the studies available so far are either based on aggregate data³ or circumscribed to the 2018 Andalusian regional elections.⁴ Hence, further academic research that is representative of national trends is badly needed.

A better understanding of VOX is also recommendable for wider research agendas on the reasons behind the emergence and success of populist radical right parties (PRRPs) in Europe. In effect, despite

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- 1 Given that VOX was founded only relatively recently, in late 2013, and that it has become a major player in Spanish politics only since the end of 2018, there is still some ongoing debate regarding its proper characterization. Nonetheless, the truth is that, even if some authors consider it to be radical but not populist (Ferreira, Carles. "Vox como representante de la derecha radical en España: un estudio sobre su ideología". *Revista Española de Ciencia Política* 0, no. 51 [2019]: 73–98), other scholars argue that populism is a core element of its political offering (Cas Mudde, *The Far Right Today* [Cambridge: Polity Press, 2019]; Stuart J. Turnbull-Dugarte, "Explaining the End of Spanish Exceptionalism and Electoral Support for Vox," *Research & Politics* 6, no. 2 [2019]), and the party falls well within the PRRP conceptualization (Matthijs Rooduijn, "What unites the voter bases of populist parties? Comparing the Electorates of 15 Populist Parties," *European Political Science Review* 10, no. 3 [2018]: 351–368; Mattia Zulianello, "Varieties of Populist Parties and Party Systems in Europe: From State-of-the-Art to the Application of a Novel Classification Scheme to 66 Parties in 33 Countries," *Government and Opposition* 55, no. 2 [2020]: 327–347). Moreover, most studies do treat it as both radical and populist (Davide Vampa. "Competing Forms of Populism and Territorial Politics: The Cases of Vox and Podemos in Spain," *Journal of Contemporary European Studies* 0 [2020]: 1–18; Mudde, *The Far Right*). It has been classified as such by the peer-reviewed *PopuList* (Matthijs Rooduijn, Stijn Van Kessel, Caterina Froio, Andrea Pirro, Sarah L. De Lange, Daphne Halikiopoulou, Paul Lewis, Cas Mudde and Paul Taggart, "The PopuList 2.0: An Overview of Populist, Far Right, Far Left and Eurosceptic Parties in Europe," *The PopuList* [3 March 2020], <https://popu-list.org/>), and the Global Party Survey dataset (Pippa Norris, "Measuring Populism Worldwide," *Party Politics* 26, no. 6 [2020]: 697–717) grades it with a score of 9.16 out of 10 in the populist dimension. For a numerical analysis of its ideological and populist placement, see the work of Turnbull-Dugarte, Rama and Santana (Turnbull-Dugarte, Stuart J., José Rama, and Andrés Santana, "The Baskerville's Dog Suddenly Started Barking: Voting for VOX in the 2019 Spanish General Elections," *Political Research Exchange* 2, no. 1 [2020]: 1781543).
 - 2 Turnbull-Dugarte et al., "The Baskerville's Dog".
 - 3 Ignacio Sánchez-Cuenca, "Noticia electoral sobre Vox para la izquierda," *ctxt.es* | *Contexto y Acción* 12 (November 2019), <http://ctxt.es/es/20191106/Politica/29494/Ignacio-Sanchez-Cuenca-analisis-elecciones-Vox-nacionalismo-xenofobia.htm>.
 - 4 Pablo Ortiz Barquero, "The Electoral Breakthrough of the Radical Right in Spain: Correlates of Electoral Support for VOX in Andalusia (2018)," *Genealogy* 3, no. 4 (2019): 72–85; Turnbull-Dugarte, "Explaining."

the growing success of these parties⁵ and the concomitant multiplication of studies on PRRPs,⁶ there is considerable variation in the determinants of the success of particular PRRPs.⁷ Thus, research on additional cases is necessary. By studying VOX, I aim to provide a small contribution to the incorporation of the Spanish case to the stream of research on European PRRPs.

The chapter is organized as follows. First, I provide a brief contextualization of the rise of VOX and several other mid-sized national parties in Spain as a consequence of the erosion of the overwhelming preponderance of Spain's two largest parties after the Great Recession and the ensuing Spanish financial crisis. Then, I recount the birth of VOX as a splinter off of Spain's main traditional conservative party and elaborate on VOX's modest electoral performance during its first four years of existence. I next proceed with a discussion on the reasons that delayed the ability of VOX to take early advantage of the weakening of the two largest political parties, as well as on what has changed in the last two years that finally enabled VOX to find its place in the Spanish party system and climb to the third position. This part of the chapter is tightly related with an exploration of the party's ideological and programmatic definition. Finally, after reporting the process whereby the party rapidly made its way to the different positions of power, I summarize the main arguments and conclude.

A Window of Opportunity Opens for Major New Parties in Spain

Before the surge of VOX in December 2018, Spain had been considered an exception in Europe due to the lack of electorally successful PRRPs.⁸ This exceptionality did not go unnoticed among scholars, who provided several explanations for the lack of success among PRRPs or other radical right-wing parties in the country.⁹

Although PRRPs have been around for more than a century, in Europe, the turn of the millennium came hand in hand with an overall increase in their electoral success, especially after the financial crisis.¹⁰ In Spain, as in many other European countries, the dominant position of the main traditional parties weakened, first, because of a decline in the vote share of the main party on the left-hand side of the political spectrum, which in Spain was and still is the Spanish Socialist Party (PSOE; Partido Socialista Obrero Español), and, second, by a descent of the main conservative party, the Popular

5 Hanspeter Kriesi and Takis S. Pappas, eds., *European Populism in the Shadow of the Great Recession* (Colchester: ECPR Press, 2015).

6 Matthijs Rooduijn, "State of the field: How to study populism and adjacent topics? A Plea for both more and less focus," *European Journal of Political Research* 58, no. 1 (2019): 362–372.

7 Rooduijn, "What Unites;" Daniel Stockemer, Tobias Lentz and Danielle Mayer, "Individual Predictors of the Radical Right-Wing Vote in Europe: A Meta-Analysis of Articles in Peer-Reviewed Journals (1995–2016)," *Government and Opposition* 53, no. 3 (2018): 569–593.

8 Marco Lisi, Iván Llamazares and Myrto Tsakatika. "Economic Crisis and the Variety of Populist Response: Evidence from Greece, Portugal and Spain," *West European Politics* 42, no. 6 (2019): 1284–1309.

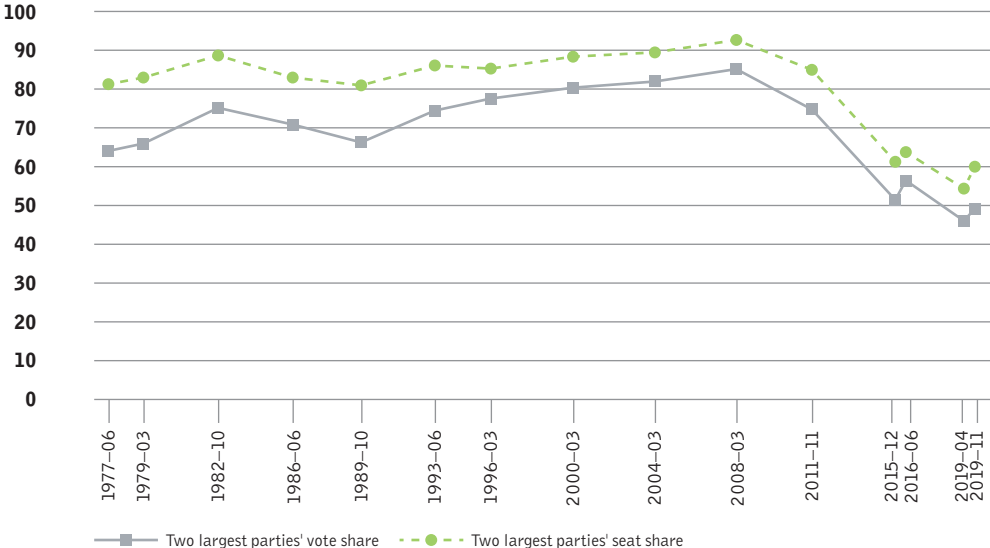
9 Diego Torres, "Spain: No Country for Old Fascists," *POLITICO*, December 26, 2016, <https://www.politico.eu/article/spain-politics-far-right-podemos-rajoy-pp-populism-vox/>; Sonia Alonso and Cristóbal Rovira Kaltwasser, "Spain: No Country for the Populist Radical Right?" *South European Society and Politics* 20, no. 1 (2015): 21–45; Iván Llamazares and Luis Ramiro, "Les espaces politiques restreints de la droite radicale espagnole. Une analyse des facteurs politiques de la faiblesse de la nouvelle droite en Espagne," *Pôle Sud* 25, no. 2 (2006): 137–152.

10 Leonardo Morlino and Francesco Raniolo, *The Impact of the Economic Crisis on South European Democracies* (New York: Palgrave Macmillan, 2017); Sara B. Hobolt and James Tilley, "Fleeing the Centre: The Rise of Challenger Parties in the Aftermath of the Euro Crisis," *West European Politics* 39, no. 5 (2016): 971–991.

Party (PP; Partido Popular).¹¹ Of note is that the earlier decline of PSOE was in line with the downslide of many socialist and social democratic parties across Europe.

Figure 1 illustrates the shrinkage in the combined share of electoral support for the two main Spanish parties after the Great Recession, which became especially noticeable after 2015. The grey solid line shows the combined vote share of the two largest Spanish parties in general elections starting with the restoration of the country’s democracy in 1977 and ending with the most recent general elections, held in November 2019. For most of the period, it has been consistently above 70%, reaching a peak of 84.6% in the March 2008 elections (which, in electoral terms, are traditionally considered pre-Great Recession). Since then, the combined vote share of the two main parties has fallen more than 35 percentage points, down to less than 50% in the last two elections, both of them celebrated in 2019. The green dashed line shows the evolution of the combined seat share of the two largest parties, which is consistently larger than their vote share due to the majoritarian bias of the electoral system (graphically, this means that it always lies above the grey solid line).¹²

Figure 1. Evolution of the combined electoral results of the two main Spanish parties, 1977–2019 (vote share and seat share in percentages)



Source: Authors on the basis of data from the Spanish Ministry of the Interior (<http://www.infoelectoral.mir.es/>).
 Note: For the 1977 and 1979 transitional elections, the figures represent the combined share of the now extinct Union of the Democratic Centre, then the main party on the right side of the political spectrum, and PSOE. In all the other elections, they represent the combined share of PSOE and PP.

11 In the first two general elections held in 1977 and 1979, the main party on the right side of the political space was Union of the Democratic Centre (UCD; Unión de Centro Democrático). Prior to 1986, the PP ran under its historic name, Popular Alliance (AP; Alianza Popular), which ran as the main party of several coalitions. José Ramón Montero and Andrés Santana, “Elections in Spain,” In *The Oxford Handbook of Spanish Politics*, ed. Diego Muro and Ignacio Lago (Oxford Handbooks. New York: Oxford University Press, 2020), 347–69.

12 Although Spain has a proportional electoral system and low electoral thresholds or barriers, it is one of the proportional systems that creates the largest distortions of voter preferences when translating votes into seats. Carlos Fernández-Esquer, “Desproporcionalidad y gobernabilidad,” *Agenda Pública*, March 29, 2016, <http://agendapublica.elpais.com/desproporcionalidad-y-gobernabilidad/>.

Since the 2015 elections, the Spanish party system has become more fragmented and can no longer be defined as an imperfect bipartisan or two-party-plus system but rather as one of extreme pluralism.¹³ However, while in many European countries similar developments were accompanied by a surge in new PRRPs or a rise among already existing PRRP vote shares, in Spain the losses of the two main parties were initially capitalized by other types of political forces:¹⁴ the centre-left to centre Union, Progress and Democracy (UPyD; Unión Progreso y Democracia), the populist, radical left Podemos (We can)¹⁵ and the centre to centre-right; Ciudadanos (Cs; Citizens). The new PRRP, VOX, emerged as a significant force in the Spanish political arena no sooner than December 2018. Thus, it can well be considered a laggard in the European landscape of populist radical right parties.

Humble origins

VOX was created as a splinter of the conservative PP¹⁶ in December 2013. Most of its founders came from the PP's ranks or had close ties with it. Its first president, Alejo Vidal-Quadras, and its current president, Santiago Abascal, both of whom were former PP leaders and both of whom come from regions where regionalist and even secessionist forces are strong (and where PP is electorally weak). Vidal-Quadras had served as president of the Catalan branch of PP, and Abascal had been president of the party's youth wing in the Basque Country and a member of PP's executive in that region.

During the first four years, the party was not very successful. Table 1 shows its electoral results during the 2014–17 period. One of the most noticeable aspects of table 1 is that VOX did not even attempt to run in 8 of the 24 electoral contests that took place during those years. Moreover, where it did indeed run, VOX was only capable of eliciting very limited levels of support, ranging from a low of 0.07% in the September 2016 Basque regional elections to a high of 1.57% in the May 2014 European elections. These modest results meant that VOX was not able to seize positions of institutional power at any level of government, with the symbolic exception of 22 seats it managed to obtain in the 2015 local elections (out of 67,515 seats contested at the municipal level in 2015; moreover, these 22 city council seats belonged to municipalities of small or medium size). Interestingly, the meagre results in the Basque elections were attained with current VOX President Abascal as the leading candidate and corresponded to the last gains of this period, whereas the comparatively better mark of the elections to the European Parliament (it only ran some fifty thousand votes short of winning a seat) were obtained with former VOX president Alejo Vidal-Quadras as the leading candidate and were the first elections in which VOX ever competed.

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- 13 José Rama, "Parties and economic crisis in Europe: a comparative analysis of new parties and changing party systems," (Madrid: Universidad Autónoma de Madrid, 2019), <https://repositorio.uam.es/handle/10486/690277>.
 - 14 Agustí Bosch and Iván M Durán. "How Does Economic Crisis Impel Emerging Parties on the Road to Elections? The Case of the Spanish Podemos and Ciudadanos," *Party Politics* 25, no. 2 (2019): 257–267; Guillem Vidal, "Challenging Business as Usual? The Rise of New Parties in Spain in Times of Crisis," *West European Politics* 41, no. 2 (2018): 261–286; Lluís Orrriols and Guillermo Cordero, "The Breakdown of the Spanish Two-Party System: The Upsurge of Podemos and Ciudadanos in the 2015 General Election," *South European Society and Politics* 21, no. 4 (2016): 469–492.
 - 15 Podemos has presented itself with changing alliances and under different names across space, time and electoral levels. In the general elections of 2015, it ran in most districts as Podemos; in 2016, it ran together with United Left (IU; Izquierda Unida) and with several minor partners as Unidos Podemos (UP; United we can). In April and November 2019, it ran again under the former coalition (with some changes regarding minor partners) and initials, but, in Spanish, the name was now feminine: Unidas Podemos. In all these elections, it ran with different brands in some of the districts; for instance, in the four Catalan districts, it ran in coalition with local partners as En Comú Podem (Together we can).
 - 16 Turnbull-Dugarte et al., "The Baskerville's Dog," Holger Döring and Philip Manow, "Parliaments and Governments Database (ParlGov): Information on Parties, Elections and Cabinets in Modern Democracies. Development Version," <http://www.parlgov.org/>.
 - 17 Sergio Sangiao. "Los orígenes de Vox: el aznarato y la lucha contra ETA," *ctxt.es* | *Contexto y Acción*, November 28, 2018, <http://ctxt.es/es/20181129/Politica/23127/vox-aznar-eta-esperanza-aguirre-sergio-sangiao.htm>.

Table 1. VOX's first electoral results, 2014–17

Date	Elections	Institution	Seats		Votes	
			Vox	Percent	Vox	Percent
25/05/2014	European	European Parliament	0	0	246,833	1.57
22/03/2015	Regional	Andalusia	0	0	18,017	0.45
24/05/2015	Local	Municipal	22	0.03	64,385	0.29
24/05/2015	Regional	Aragón	NR	NR	NR	NR
		Asturias	0	0	3,176	0.59
		Balearic Islands	NR	NR	NR	NR
		Canary Islands	0	0	1,853	0.2
		Cantabria	0	0	1,092	0.34
		Castile-La Mancha	0	0	5,277	0.48
		Castile-Leon	0	0	9,219	0.68
		Extremadura	0	0	1,773	0.28
		La Rioja	NR	NR	NR	NR
		Madrid (region)	0	0	37,043	1.17
		Murcia (region)	0	0	5,513	0.87
		Navarre	NR	NR	NR	NR
		Valencia (region)	0	0	10,184	0.41
		Ceuta (Autonomous City)	0	0	356	1.22
		Melilla (Autonomous City)	NR	NR	NR	NR
27/09/2015	Regional	Catalonia	NR	NR	NR	NR
20/12/2015	General	Congress	0	0.0	58,114	0.23
		Senate	0	0.0	196,457	0.30
26/06/2016	General	Congress	0	0.0	47,182	0.20
		Senate	0	0	165,740	0.26
25/09/2016	Regional	Basque country	0	0.0	774	0.07
		Galicia	NR	NR	NR	NR
21/12/2017	Regional	Catalonia	NR	NR	NR	NR

Source: Authors on the basis of data from the Spanish Ministry of the Interior (<http://www.infoelectoral.mir.es/>) for the European, local and general elections and data from the respective regional governments for the regional elections. Note: NR means VOX did not run in those elections. Votes for the Senate add the votes for all the candidates.¹⁸

18 Citizens in provincial districts elect up to three candidates, which need not be of the same party; two candidates in the autonomous cities of Ceuta and Melilla, as well as in the three largest islands, namely Mallorca, Gran Canaria and Tenerife, and only one in the smaller islands, Ibiza-Formentera, Menorca, Fuerteventura, Gomera, Hierro, Lanzarote, and La Palma. I am grateful to Pablo Cabrera for facilitating some of the data on the Senate to me.

The Uneven Window of Opportunity

The lack of success for VOX in its first years is owed to the fact that the situation was not ripe yet for a competitor to rise on the far-right of the ideological spectrum in Spain. To comprehend why this was the case, it is useful to disaggregate the data on the combined vote and seat share of the two largest parties (presented in figure 1 above). Figure 2 assists us in this task by representing two different lines: the vote share of the largest right-wing party (UCD in 1977 and 1979, and PP thereafter) and the largest left-wing one (always PSOE). The grey, solid line displays the evolution of the vote share of PP (or UCD in 1977 and 1979), whereas the green, dashed line does the same for PSOE. To simplify the interpretation, only the values for the vote share are shown.¹⁹

As figure 2 discloses, PSOE had already experienced a sharp decline in its vote share in 2011: It lost more than 15 percentage points, down from more than 44% to less than 30%, and ended up slightly below its up-until-then lowest mark, attained more than 30 years prior in the 1977 foundational elections. This result was almost ten points below the party's mean in the previous elections (28.8% in 2011 versus a mean of 39.2% between 1977 and 2008). In those elections, PP did not lose any votes. To the contrary, it achieved its best results ever, seizing close to 45% of the votes. Hence, the 2011 elections witnessed a serious deterioration of PSOE but no major fissures in the two-party-plus system yet.

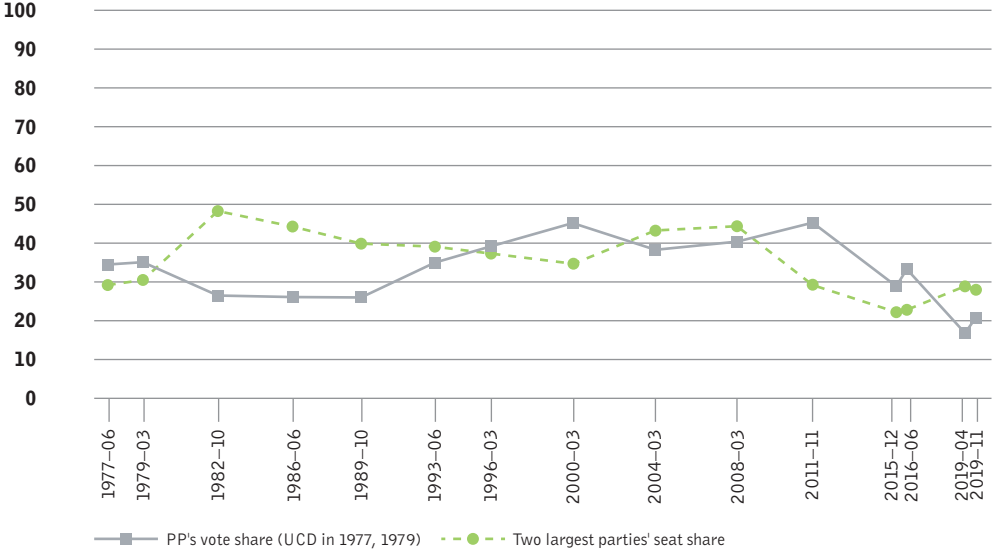
The crucial blow to the old party system had to wait four years more and materialized in the 2015 elections, which, adapting the expression employed by Santamaría²⁰ to describe the 1982 contest, produced a true electoral earthquake, the cause of which was the confluence of a deep economic crisis, a profound political one, and an ensuing impasse in democratic representation.²¹ PSOE fell to a new low of 22% of the vote share, well under any of its previous marks and only slightly above half its previous mean, leaving part of its natural electorate to be attracted by two vigorous new parties, Podemos and Cs, one at each flank of PSOE in ideological terms. Discontent with PSOE, which had been unable to react timely in response to the Great Recession, now extended to PP, which had executed tough austerity measures in its 2011–15 government. Following in the steps of PSOE but with a one-election delay, it was now its turn to lose more than 15 percentage points and end up slightly below the 30% threshold. Taking into account only elections in which it was the main conservative party, and thus excluding the first two (in which the leading party in the centre to centre-right camp was UCD), this result was considerably below the party's mean in previous elections (28.9% in 2015 versus a mean of 35.6% between 1982 and 2011).

19 As was the case for figure 1, the trend is remarkably similar in terms of seat share, with the only particularity that the share of seats for these parties is always higher than their share of votes.

20 Julián Santamaría, "Elecciones generales de 1982 y consolidación de la democracia: A modo de introducción," *Revista Española de Investigaciones Sociológicas* 28 (1984): 7–17.

21 Montero and Santana, "Elections in Spain."

Figure 2. Evolution of vote shares for each of the two main Spanish parties, 1977–2019



Source: Elaboration of the author on the basis of data from the Spanish Ministry of the Interior (<http://www.infoelectoral.mir.es/>).

Hence, even if, as I argued above, a window of opportunity for new national parties of medium size started to open after the Great Recession of 2008, a closer look at the evolution of the electoral results for the two parties reveals that, at the beginning, this window was restricted to the ideological space on the flanks of PSOE. So, it comes as no surprise that the parties that initially took advantage of the deterioration of the former two-party-plus system were left-wing populist parties like Podemos²² and parties placed close to the centre like UPyD or Cs.²³

VOX, the Ultimate Line of Defence for Spanish Nationalism

What changed between the June 2016 general elections, in which PP’s erosion was already noticeable but the window of opportunity for new national parties was still concentrated to the left and the centre, and April 2019, when the drop in support for PP was so large that competitors on both its flanks were viable? To put it differently, what happened between December 2017, the last elections in the humble, first period of VOX (i.e., the Catalan regional elections in which VOX did not even run) and the December 2018 Andalusian regional elections, which marked the beginning of a new period in which VOX has become a key political force?

22 Juan Rodríguez-Teruel, Astrid Barrio and Oscar Barberà. “Fast and Furious: Podemos’ Quest for Power in Multi-Level Spain,” *South European Society and Politics* 21, no. 4 (2016): 561–585; Andrés Santana and José Rama “Electoral Support for Left Wing Populist Parties in Europe: Addressing the Globalization Cleavage,” *European Politics and Society* 19, no. 5 (2018): 558–576.

23 Juan Rodríguez-Teruel and Astrid Barrio, “Going National: Ciudadanos from Catalonia to Spain,” *South European Society and Politics* 21, no. 4 (2016): 587–607.

To understand the transition from one phase to the other, two factors should be underlined. On the one hand, a severe scandal connected to PP's financing, which involved many of its leaders, became publicly known. As a result of this scandal, Pedro Sánchez, PSOE's leader, was able to lead a heterogeneous coalition with UP and many subnational parties, including Basque nationalist parties and even Catalan secessionist ones, to oust Mariano Rajoy's PP government and replace it with a PSOE executive. Both the scandal itself and the ensuing dethroning of Rajoy and his government caused a significant deterioration of PP's image and its already eroded support base.

On the other hand, and even more importantly, there was the aggravation of the territorial question, with the mounting challenges of former Catalan regionalist and then secessionist parties. Besieged by mounting social unrest following welfare cuts in the aftermath of the Great Recession as well as by severe irregularities regarding corruption and party financing, Catalan nationalist leaders found it in their interest to escalate the territorial issue.²⁴ Thus, after a series of other challenges, the now secessionist parties heading the Catalan government issued a failed unilateral independence declaration in late October 2017. As a consequence of this, the still Rajoy-led Spanish government applied Article 155 of the Spanish Constitution, suppressed the Catalan autonomous government for more than half a year and imprisoned several secessionist leaders.

All these developments generated feelings of grievance among a significant part of the population, worried by the fact that politicians in a part of the country had failed to honour Spanish and Catalan laws. Many of those who shared these feelings were concerned by the ability and determination of PP to handle the situation. Thus, the situation was ripe for other political forces to mobilize these feelings and, in this regard, no party was better placed than VOX, which, since its very conception, had defended a strong position on the territorial issue. The Catalan and Basque origins of VOX's first and current leaders, Vidal-Quadras and Abascal, is not a mere coincidence. One of the key reasons behind the creation of VOX was the perception that PP was not firm enough against the nationalist and secessionist challenges of the Basque and Catalan parties.²⁵ VOX was and is also the only party defending a recentralization of competences from the regions to the central government. In response to the secessionist challenge, VOX acted as a private prosecutor against the secessionist leaders and thereby elicited a lot of coverage by and attention from the media.

While VOX neither had the time nor the means to prepare a platform to run in the exceptional Catalan regional elections convoked by the Spanish government after the suppression of Catalan autonomy, it was able to do so one year later in the Andalusian elections. The available studies concur that those elections were marked by a second dimension of centre-periphery,²⁶ and that the territorial issue was one of the main drivers of the vote for VOX.²⁷ Further analyses show that the territorial issue was also one of the main reasons behind the citizen support for VOX in the April 2019 general elections,²⁸

24 Montero and Santana, "Elections in Spain."

25 As a matter of fact, the creation of two of the other abovementioned parties, UPyD and Cs, was also closely linked to the Basque and Catalan problem. The first and most well-known leader of UPyD, Rosa Díez (a former PSOE militant who held several important positions in the party), is of Basque origin, as is another of its founders, the well-known philosopher and writer Fernando Savater. The decision to create UPyD came mainly from Basque unionist (pro-Spanish) politicians, and the party advocated centralist measures and a tough stance on convicts of the former Basque terrorist group ETA. In turn, Ciudadanos was created with the main goal of fighting the impositions of Catalan nationalism and, under the leadership of Barcelona-born Albert Rivera, remained mainly a regional party primarily focused on Catalan politics until approximately 2014, when it managed to obtain two seats in the elections to the European Parliament.

26 Braulio Gómez, Laura Cabeza and Sonia Alonso, *En Busca Del Poder Territorial: Cuatro décadas de elecciones autonómicas en España* (Madrid: Centro de Investigaciones Sociológicas, 2019).

27 Turnbull-Dugarte, "Explaining."

28 Turnbull-Dugarte et al., "The Baskerville's Dog;" Stuart J. Turnbull-Dugarte, "Los Votantes de Vox: nacionalistas, pero no nativistas," *Politikon*, May 23, 2019.

and preliminary analyses of the November 2019 general elections (still unpublished) confirm the key importance of this issue again.

To summarize, aided by corruption scandals that had already aggravated the erosion of PP's image, VOX was able to capitalize on the territorial crisis and present itself as the ultimate and most credible line of defence for Spanish nationalism. Given the overwhelming salience of the territorial issue following the Catalan secessionist challenge and, most importantly, after the failed (and unlawful) declaration of independence, many of the citizens concerned with the issue decided to give VOX an opportunity. The December 2018 Andalusian regional elections were the first chance they had to do it.

First We Take Andalusia, Then We Take the Rest

After its breakthrough in the Andalusian regional elections, where VOX surprised the media and the experts with close to 11% of the votes and 12 out of 109 seats in the powerful parliament of Spain's most populated region, the party extended its presence in all other levels of government, as shown in table 2. Four months later, in concurrent elections to the region of Valencia and the Spanish national congress in April 2019, it obtained similar results to those obtained in Andalusia, dismissing those who suspected that the Andalusian result was exceptional and would not be repeated elsewhere. On the one hand, its 10.6% of the votes allowed it to enter a second regional government, with 10 out of 99 seats in the Valencian parliament. Even more importantly, it won slightly more than 10% of the vote in the general elections, which allowed it to jump to the national level and embark with 24 out of 350 seats in the national congress, partially reshaping again the Spanish party system. Only one month later, in May 2019, the Spanish citizenry was called once again to the ballot boxes for concurrent European, regional and local elections. The party obtained less impressive results: 6.2% of the votes in the European elections, a mean of 7.0% in the regionals, and only 3.6% of votes for city councils.

However, this allowed VOX to complete its entrance into all levels of government, with 4 of the 59 seats assigned to Spain in the European Parliament and 530 (of the 67,515) seats in city councils, on top of adding 35 more seats (of the 766 contested in May) in regional parliaments to the 22 it had already seized in the Andalusia and Valencia regions. Hence, within five months, the party had obtained an impressive amount of institutional power. However, the fact that its results in May were worse than those in April cast doubts on the ability of VOX to maintain and enlarge its electoral base. Again, the outcome of the November 2019 snap general elections proved wrong those who doubted the electoral prospects of VOX, which raised slightly more than 15% of the votes and 52 out of 350 seats in the Congress of Deputies, climbing to the third position both in terms of votes and seats. November also meant the entrance of VOX to the Spanish Senate. In addition, VOX competed in elections conducted in July 2020 for two other regions, Galicia and the Basque Country. Its results were modest – VOX only obtained one seat in the latter and none in Galicia. However, this was not very surprising given that previous results in those regions had been much lower than in most of the other regions.

Table 2. VOX's electoral results, 2018–20

Date	Elections	Institution	Seats		Votes	
			Vox	Percent	Vox	Percent
02/12/2018	Regional	Andalusia	12 (109)	11.01	397	10.96
28/04/2019	Regional	Valencia (region)	10 (99)	10.10	279	10.59
28/04/2019	General	Congress	24 (350)	6.86	2,688,092	10.26
		Senate	0 (75)	0.0	5,998,649	8.41
26/05/2019	European	European Parliament	4 (59)	5.56	1,393,684	6.21
26/05/2019	Regional	Total May regional elections	35 (766)	4.57	694,941	6.97
26/05/2019	Local	Total 8093 municipalities	530 (67,515)	0.79	812,804	3.57
10/11/2019	General	Congress	52 (350)	14.86	3,640,063	15.09
		Senate	2 (208)	0.96	3,229,631	5.11
12/07/2020	Regional	Galicia	0 (75)	0	26,485	2.03
12/07/2020	Regional	Basque country	1 (75)	1.3	17,517	1.96

Source: Elaboration of the author on the basis of data from the Spanish Ministry of the Interior (<http://www.infoelectoral.mir.es/>) for the European, local and general elections. The data of the respective regional governments is adapted from Santana and Rama for the regional elections.²⁹ See table 1 for details on the computations regarding the Senate; the figures regarding the number of senators consider only those directly elected by citizens (regional parliaments designated 57 senators in each of the 2019 legislatures).

Note: The total in the May 2019 regional elections takes into account 12 regions (out of 17) and 2 autonomous cities that conducted their electoral contest on 26 May. In the seats' column, the figures in parenthesis report the total number of seats contested in each election.

Crucially, the party was able to signal its political significance, surpassing the electoral threshold for representation in 7 of the 12 regions that held elections that day. Across the different regions, the party increased its number of regional seats from 0 (after the autonomous elections of 2015) to 59.

The summary results for the May 2019 regional elections mark important differences in support for VOX across different regions. Table 3 shows the results for each of them and reveals that the vote share of VOX ranged from 1.29% in Navarre to 9.46% in Murcia and 22.4% in the autonomous city of Ceuta if the results for the 2 Spanish autonomous cities in Northern Africa are considered. In sharp contrast to the former regional elections, in 2019 VOX ran in all regions and obtained representation in 7 out of the 12 plus in the 2 (out of 2) autonomous cities that celebrated their elections in May 2019.

²⁹ Andrés Santana and José Rama, "El perfil del votante de Vox," in *El auge la extrema derecha en Europa*, ed. Yanina Welp (Madrid: Comisiones Obreras – Agenda Pública, 2019), 17–24.

If we add up the results in the other 4 regions that held their elections in December 2018 (Andalusia), April 2019 (Valencia) and May 2020 (Galicia and the Basque Country), VOX has entered the parliaments of 10 regions and the 2 autonomous cities and has failed to do so in 6 (the 17th and last region, Catalonia, did not hold elections in these years). Moreover, although VOX was formally excluded from the right-leaning coalition governments, its support has played a crucial role in important regions like Andalusia, Murcia and the region of Madrid (home to the country's capital city), and its key position backing the governments in these three regions has conferred an advantage of visibility and an additional layer of power on the party, which has been able to influence some of the policies of the three regional executives.

Table 3. VOX's results in the May 2019 regional elections, detailed

Region	Seats		Votes	
	Vox	Percent	Vox	Percent
Aragón	3 (67)	4.48	40,671	6.08
Asturias	2 (45)	4.44	33,784	6.42
Balearic Islands	3 (59)	5.08	34,668	8.12
Canary Islands	0 (70)	0	22,021	2.47
Cantabria	2 (35)	5.71	16,392	5.05
Castile-La Mancha	0 (33)	0	75,636	7.02
Castile-Leon	1 (81)	1.23	75,331	5.49
Extremadura	0 (65)	0	28,849	4.00
La Rioja	0 (33)	0	6,277	3.86
Madrid (region)	12 (132)	9.09	285,099	8.86
Murcia (region)	4 (45)	8.89	61,591	9.46
Navarre	0 (51)	0	4,401	1.29
Ceuta (autonomous city)	6 (25)	24.00	7,566	22.37
Melilla (autonomous city)	2 (25)	8.00	2,655	7.76

Source and notes: See table 2. The Canary Islands have a peculiar system with a ballot for the district (the island) and a ballot for the region as a whole. The data reported in the table refers to the former, although the results of VOX for the latter were almost the same: 21,948 (2.46%).

A comparison of the VOX results in the 2015 local elections (22 seats, as shown in table 1) and those of 2019 (530 seats, as shown in table 2) shows a significant extension of the local power of the party from one election to the next, but, as table 2 also reveals, in percentage terms, VOX obtained a very limited share (0.8%) of the total seats contested in the 2019 local elections. However, the significance of the results also depends on whether the seats were gained in small or medium municipalities, as in 2015, or in larger ones. Table 4 shows the results of VOX in Spain's 15 most populated cities: Again, the results vary significantly among them, from a low of 1.1% in Bilbao to a high of 13.1% in Palma de Mallorca. This variability notwithstanding, it is remarkable that VOX was able to obtain representation on the city councils of 10 out of the 15 most populated cities of the country. Coupled with the fact that, as happened on the regional level, VOX's seats are crucial for some local governments to pass laws or even to stay in office, it becomes evident that the party has also become a major actor in the local political arena.

Table 4. VOX's results in the May 2019 local elections, detail of the largest cities

City	Seats		Votes	
	Vox	Percent	Vox	Percent
Madrid (city) [1]	4	7.02	124,252	7.63
Barcelona [2]	0	0	8,751	1.16
Valencia (city) [3]	2	6.06	28,126	7.25
Sevilla [4]	2	6.45	25,122	7.95
Zaragoza [5]	2	6.45	20,392	6.15
Málaga [6]	0	0	10,400	4.36
Las Palmas de Gran Canaria [7]	0	0	4,831	3.16
Murcia (city) [8]	3	10.34	21,078	10.17
Bilbao [9]	0	0	1,910	1.14
Palma de Mallorca [10]	4	13.79	19,111	13.11
Valladolid [11]	1	3.70	10,665	6.33
Córdoba [12]	2	6.90	11,788	8.04
Vigo [13]	0	0	1,936	1.30
Alicante [14]	2	6.90	8,578	6.38
Gijón [15]	2	7.41	9,517	7.01

Source and notes: See table 2. The values between brackets displayed to the right of each city indicate its place in the population ranking according to data from the Spanish Statistical Office as of 1 January 2020: <https://www.ine.es/dynt3/inebase/es/index.htm?padre=517&capsel=522>.

Conclusions

As in many other European countries, the Great Recession eroded support in Spain for the two traditional main parties: the socialist PSOE and the conservative PP. Although this erosion opened a window of opportunity for new national parties, initially this window was concentrated on the flanks of PSOE, so it mainly profited populist radical left parties like Podemos (later rebranded Unidos Podemos) or parties close to the centre of the ideological spectrum (first Union, Progress and Democracy and, later, Ciudadanos).

Thus, VOX, which was founded out of a scission in PP in late 2013, could not take advantage of this situation – at least in the first four years of its existence, which were marked by very modest electoral results and the inability to seize positions of institutional power. The situation changed dramatically due to the heightening importance of the territorial issue following the challenges of Catalan secessionist leaders and their failed unilateral declaration of independence. VOX, which since its creation had taken a tough stance on subnational nationalisms, managed to present itself as the most reliable line of defence for Spanish unity and Spanish nationalism, a message that a significant part of the population, already dissatisfied with PP, found appealing enough. As a consequence of this, although certainly a laggard in the landscape of European populist radical right parties, VOX has managed to climb to the third position in terms of popular support and to accumulate a significant amount of power at all levels, including city councils, regional parliaments, the national Congress and Senate and the European Parliament.

Democratic Efficacy and Populist Attitudes: A Conceptual and Empirical Exploration

MÁRTON BENE AND ZSOLT BODA¹

Introduction

Starting in the early 1950s with the first systematic studies of voting behaviour, interest in political efficacy developed mostly because it was found to be one of the most important predictors of political participation.¹ Since political participation was always considered an important feature of democratic governments, high political efficacy among citizens was consequently deemed an important characteristic of good democratic governance. However, at the beginning of this century, many studies of political behaviour found decreasing levels of political participation in the Western – not to mention Eastern European – democracies during the twentieth century,² which was sometimes seen as an indicator of a declining quality of democracy. More recently, this decline in political participation seems to have stabilized and, in some countries, even increasing levels of political participation have been detected. However, increasing numbers of people participating in politics started supporting populist and extremist political actors.³ As a result, it has become clear that this crude level of political participation on its own is an insufficient (or even misleading) indicator as to the quality of democratic governance, and the democratic quality of political participation should be taken into consideration as well.

The same seems to apply to the concept of political efficacy. Political efficacy is an important motivational background for political participation, but it can say nothing about its democratic quality. Therefore, to make the concept fit the contemporary challenges of political science and political realities, it seems reasonable to supplement it with a democratic component. The “DEMOS” project developed the concept of democratic efficacy for this purpose. The concept of democratic efficacy is an analytical framework to understand the challenges of populism and to provide guidance for actions and interventions. The term is designed to capture the way subjective sentiments towards politics – in other words, external and internal political efficacy – are connected to “objective” individual capacities that are assumed to promote democratic behaviour. The concept of democratic efficacy thus embodies both subjective (attitudinal) and “objective” (measurable individual skills) dimensions. Also, as we interpret populism as a sign of mismatch between the operation of the polity and the needs of citizens’, facing the challenges of populism necessitates considering the role of both sides: the system and the individual. Democratic efficacy should be interpreted in its context; therefore, it is important to uncover how contextual factors shape it and how its working and effects on political behaviour are conditioned by those factors. Although we will not deal with the problem of context here, it is important to keep it in mind.

In line with this idea, we argue that the concept of democratic efficacy consists of two dimensions: *political efficacy* and *democratic capacities*. Below, we present these aspects and connect them to each other. In this paper we also use data from an online survey made by the DEMOS project in 15 European countries in order to provide descriptive data on democratic efficacy. The first step in testing the association of democratic efficacy indicators with populism was also made, showing that most of the

1 See Angus Campbell, Gerald Gurin, and Warren E. Miller, *The Voter Decides* (Evanston: Row Peterson, 1954).

2 André Blais, “Political Participation,” in *Comparing Democracies 3*, ed. Lawrence LeDuc, Richard G. Niemi, Pippa Norris (London: Sage, 2010), 165–183.

3 For increasing populist voting on both the left and right of the political spectrum, see <https://populismindex.com>.

items composing democratic efficacy have a negative association with populist attitudes. This opens promising avenues for the use of the concept in further analyses concerning populism.

Starting Point: Political Efficacy

The concept of political efficacy (PE) is rather well-researched, and interest in it dates back to the classical political behaviour study of Campbell, Gurin and Miller.⁴ The authors proposed that the “sense of political efficacy may be defined as the feeling that individual political action does have, or can have, an impact upon the political process, i.e. that it is worthwhile to perform one’s civic duties. It is the feeling that political and social change is possible, and that the individual citizen can play a part in bringing about this change.”⁵ As such, political efficacy was demonstrated to strongly determine whether people would participate in the political processes, and this emphasis in empirical studies continues to this day.⁶

Soon after, Lane distinguished two dimensions of political efficacy: a person’s image of the self and that of the government.⁷ Consequently, internal and external dimensions of political efficacy have been conceptualized and used in political studies.⁸ Broadly speaking, *internal political efficacy* (IPE) refers to citizens’ beliefs that they have the competence to understand and effectively participate in politics (subjective competence), and *external political efficacy* (EPE) is related to public perceptions of governmental institutional responsiveness (perceived system responsiveness). Importantly, low political efficacy means that citizens distrust governmental institutions and do not believe that their actions will influence governance. Therefore, low political efficacy is related to political alienation, which is detrimental to the health of a democratic political system.

People can be divided into four general groups based on their level of political efficacy. Some people have a high level of PE in both dimensions: They believe in both the responsiveness of the political system and their political competence to influence it. Its reverse form is when one has a low level of PE in both dimensions; those who perceive politics to be difficult for ordinary people to shape. A mixed type is when one thinks that the political system cares about people’s will (higher EPE) but do not regard themselves as capable of meaningful participation (lower IPE). As these people believe in the political system more than in themselves, they can be labelled as “paternalists”. Others feel that it is hard to change the political system (lower EPE), but they are confident in their own political capabilities (higher IPE). As the strong inner motives are at odds with the perceived external opportunities, this group can be labelled as “sceptics” (see table 1).

4 Campbell et al., *The Voter*.

5 *Ibid.*, 187.

6 See Nicholas A. Valentino, Krysha Gregorowicz, and Eric W. Groenendyk, “Efficacy, Emotions and the Habit of Participation,” *Political Behavior* 31, no. 3 (2009): 307–330; Paul Marx, Christoph Nguyen, “Are the Unemployed Less Politically Involved? A Comparative Study of Internal Political Efficacy,” *European Sociological Review* 32, no. 5 (2016): 634–648; Homero Gil de Zúñiga, Trevor Diehl, Alberto Ardévol-Abreu, “Internal, External, and Government Political Efficacy: Effects on News Use, Discussion, and Political Participation,” *Journal of Broadcasting & Electronic Media* 61, no. 3 (2017): 574–596.

7 Robert E. Lane, *Political Life: Why People Get Involved in Politics* (Glencoe: The Free Press. 1959).

8 George I. Balch, “Multiple Indicators in Survey Research: The Concept ‘Sense of Political Efficacy,’” *Political Methodology* 1, no. 2 (1974): 1–43; Stephen C. Craig, Michael A. Maggiotto, “Measuring Political Efficacy,” *Political Methodology* 8, no. 3 (1982): 85–109; Alan Acock, Harold D. Clarke, and Marianne C. Stewart, “A New Model for Old Measures: A Covariance Structure Analysis of Political Efficacy,” *Journal of Politics*, 47, no. 4 (1985): 1062–1084; Stephen C. Craig, Richard G. Niemi, and Glenn E. Silver, “Political Efficacy and Trust: A Report on the NES Pilot Study Items,” *Political Behavior* 12, no. 3 (1990): 289–314; Richard G. Niemi, Stephen C. Craig, Franco Mattei, “Measuring Internal Political Efficacy in the 1988 National Election Study,” *American Political Science Review* 85, no. 4 (1991): 1407–1413.

Table 1. The concept of political efficacy

	Political efficacy			
	High	Low	Paternalists	Sceptics
External PE	+	-	+	-
Internal PE	+	-	-	+

The eighth round of the European Social Survey (ESS8) included only two internal and two external political efficacy items⁹, and the illustration below draws upon those questions. Respondents had to indicate their level of agreement with each statement on a 5-point scale, where 1 represents the lowest level of political efficacy. A high level of internal and external political efficacy is established when a given respondent marked 3 or above for both questions.

Table 2. The share of respondents of the ESS8 based on their level of political efficacy (only for countries involved in the DEMOS project)¹⁰

Political efficacy (N = 33,159)			
High	Low	Paternalists	Sceptics
10.4 %	61.1 %	14.1 %	14.4 %

These findings indicate that a large majority of respondents have a low level of political efficacy in both dimensions. Only 10% of people in the sample are politically efficacious. The results suggest that it is appropriate to distinguish the two mixed types of political efficacy since significant shares of our respondents can be classified by these categories. Almost equal shares of the sample belong to these two mixed forms (paternalists and sceptics).

However, in recent studies, the notion of measurement and analysis of political efficacy as an important motivational background for political participation brought an important disconcerting insight to light. Namely, an increase in general political participation appeared to be related to populist voting and increasing support for populist attitudes and activism. Therefore, the standard causal logic relating higher levels of political efficacy with growing political participation and, consequently, with increased quality of democratic governance appeared to be tenuous. Thus, to make the concept of political efficacy fit the contemporary challenges of democratic governance, it seems reasonable to supplement it with a democratic component. We propose that democratic participation is enabled by a higher level of political efficacy that is paired with certain democratic capacities.

9 The external dimension included “How much would you say the political system in [your country] allows people like you to have a say in what the government does?” and “How much would you say that the political system in [your country] allows people like you to have an influence on politics?” The internal dimension included “How able do you think you are to take an active role in a group involved with political issues?” and “How confident are you in your own ability to participate in politics?”

10 Belgium, Czechia, Germany, France, Hungary, Italy, Lithuania, Netherlands, Poland, Spain and the United Kingdom.

Democratic Capacities

The normative theories of democracies impose certain requirements not only on the level of political system or the elite but also on that of the citizens. According to these, ideal democracy can only work if citizens have certain democratic capacities. For instance, some degree of information is needed and desired to substantively participate in politics.¹¹ In democratic settings, citizens must make decisions on the most important political questions. Besides, decision-making based on relevant information is more likely to reflect voters' true preferences. Consequently, citizens need to have some general political knowledge but also keep up with the day-to-day political processes.

However, having political knowledge and being up to date are not enough to make informed political decisions. Citizens must be reflective about their decisions and base their choices and political preferences on them.¹² However, strong emotional attachments may undermine this reflexivity and introduce serious biases in reasoning and evaluation of political information.¹³

Furthermore, the idea of democracy is based on some core values that citizens are required to embrace in order to make it work properly. First, the political and legal equality of the citizenry is a prerequisite of democracy.¹⁴ Second, the normative justification of democracy rests upon the premise that citizens are capable of making free and autonomous decisions.¹⁵ Third, democracy is a social activity where individuals must consider that others also have legitimate interests, opinions and values. Citizens must tolerate and listen to opinions different from their own because democracy is based on the idea of exchanging and confronting competing views and interests.¹⁶ These values correspond to the three core values of democracy. Namely, equality of interests, political autonomy and reciprocity, as conceptualized by Brettschneider.¹⁷

Also, certain political or civic skills have long been considered to represent crucial democratic capacities.¹⁸ We assume that coping with populism requires specific skills, for example, the quality of being able to deal with plurality and conflicts in politics and policy, practicing empathy towards others' legitimate needs and goals, scrutinizing leaders and their decisions, consuming media content in a reflective manner (media literacy) and being able to express one's own legitimate needs, aspirations and preferences.

We propose five groups of democratic capacities and values that must be paired with political efficacy in order to derive a measure of democratic efficacy¹⁹:

■ *Factual political knowledge.* Citizens need to have some general political knowledge but also keep up with day-to-day political processes.

11 Michael Delli Carpini and Scott Keeter, *What Americans know about politics and why it matters* (New Haven: Yale University Press, 1996).

12 John Dewey, *The Public and Its Problems* (Athens: Swallow Press, 1954).

13 Robert Y. Shapiro, Yaeli Bloch-Elkon, "Do the Facts Speak for Themselves? Partisan Disagreement as a Challenge to Democratic Competence," *Critical Review* 20, no. 1–2 (2008): 115–139; Michael Bang Petersen, Martin Skov, Søren Serritzlew, and Thomas Ramsøy, "Motivated Reasoning and Political Parties: Evidence for Increased Processing in the Face of Party Cues," *Political Behavior* 35, no. 4 (2013): 831–854.

14 Robert A. Dahl, *A Preface to Democratic Theory* (Chicago: University of Chicago Press, 1956).

15 Sanford Lakoff, "Autonomy and Liberal Democracy," *The Review of Politics* 52, no. 3 (1990): 378–396.

16 Hannah Arendt and Jerome Kohn, *Between Past and Future: Eight Exercises in Political Thought* (New York: Viking Press, 1968); Diana C. Mutz, *Hearing the Other Side: Deliberative versus Participatory Democracy* (Cambridge: Cambridge University Press, 2006).

17 Corey Brettschneider, "The Value Theory of Democracy," *Politics, Philosophy & Economics* 5, no. 3 (2006): 259–278.

18 Sidney Verba, Kay Lehman Scholzman, and Henry E. Brady, *Voice and Equality: Civic Voluntarism in American Politics* (Cambridge: Harvard University Press, 1995).

19 For more details see: Márton Bene and Zsolt Boda, "Conceptualising Democratic Efficacy." DEMOS Working Papers, April 2020, https://openarchive.tk.mta.hu/419/1/Democratic%20Efficacy_31-03-2020.pdf.

- *Political news consumption.* Citizens need to develop habits of using the media for political information in a reflective manner.
- *Political reflexivity.* Citizens must reflect on political information; however, strong emotional attachments (political identities) may undermine this reflexivity and introduce serious biases in reasoning and evaluation of political information.
- *Core values of democracy.* As prerequisites of democracy for it to work properly, citizens are required to embrace certain values: respect for political and legal equality (equality of interests), capability of making free and autonomous decisions (political autonomy) and tolerance of and attention paid to opinions different from their own (reciprocity).
- *Political or civic skills.* Citizens must be at ease with practicing certain behaviours and attitudes: coping with plurality and conflicts in politics and policy, scrutinizing leaders and their decisions and being able to express one's own legitimate needs, aspirations and preferences.

Based on this conceptualization, people with complete democratic capacities are those citizens who have (1) a certain level of factual political knowledge; (2) are regular and reflective news consumers; (3) are non-intensive partisans (as a proxy of reflexivity); (4) strongly identify with the core values of democracy, that is, political and legal equality, tolerance towards dissenting opinion and individual autonomy; and (5) have some involvement in political activities.

In order to measure the levels of democratic efficacy, we turned to survey data available in the major international academically driven surveys. They employed data from the European Social Survey, well-known for its rigorous cross-cultural design. The ESS8 conducted in 2016–17 contained items for the measurement of both political efficacy and democratic capacities except for political knowledge. In the ESS questionnaire political news consumption was measured by the question of how many minutes respondents spend consuming political news in a regular day. They consider regular news consumers those respondents who read, watch or listen to news at least 30 minutes in a regular day. Regarding partisanship, closeness to a political party was measured on a 4-point scale, and only the extreme value indicating “very close” was regarded as a highly partisan answer. Participants were also asked to what extent they identify with certain character types and values on a 6-point scale. Three items of the ESS survey are closely related to the three core values of democracy discussed above. In detail, values of 1 and 2 indicate identification with these statements as they were labelled as “very much like me” and “like me” respectively. Our political activity measure was based on the ESS8 questionnaire items measuring involvement in different types of political activity. Table 2 shows the share of respondents who meet these criteria for each component of our democratic capacities concept.

Table 3. The share of respondents of the ESS8 based on available measures of democratic capacities (only for the countries involved in the DEMOS project)

	News consumption	Partisanship	Equality	Tolerance	Autonomy	Political activity
Criteria	At least 30 min. per day	1–3 (4-point scale)	1–2 (6-point scale)			At least 1
Percentage	79.4 (N = 34,256)	95.2 (N = 33,747)	71.5 (N = 34,215)	65.2 (N = 34,114)	68.5 (N = 34,207)	52.0 (N = 34,695)

The findings above suggest that all these capacities are widely shared in the democratic countries under investigation. The large majority of respondents share the following democratic capacities: They consume news regularly, are non-intensive partisans and they believe in the values of equality, tolerance and individual autonomy. More than half of them were involved in at least one political activity in the preceding 12 months.

However, table 4 indicates that their combined presence is not as universal: Only a fifth of the respondents have all these democratic capacities, while most respondents have incomplete capacities. These findings suggest that these capacities are suitable to let us categorize respondents; the validity of them is supported by their wide presence in democratic countries, but their combined occurrence can differentiate people with more or less democratic capacities.

Table 4. The share of respondents to the ESS8 based on the mixture of their democratic capacities (N = 34,695)

People with complete democratic capacities	People with incomplete democratic capacities
19.5 %	80.5 %

Constructing Democratic Efficacy

After conceptualizing democratic capacities, the concept of political efficacy can be supplemented with a democratic component in order to introduce a quality aspect into the original term. While political efficacy is about subjective attitudes towards politics, which is crucial as a motivational background of political behaviour, democratic behaviour requires some objective capacities as well. The concept of democratic capacities supplements this subjective construct (political efficacy) with these objective requirements. As a result, the concept of democratic efficacy as a more nuanced approach to political efficacy may provide an appropriate framework for understanding democratic political behaviour, which is also one of the most important themes of the DEMOS project.

We conceptualize democratic efficacy not as a linear but as a two-dimensional concept. It would not make sense to simply add the measures of democratic capacities to those of political efficacy; we believe it is conceptually sounder and more interesting to capture the different combinations of the two sets of measures.

Theoretically, pairing the two concepts makes sense only if they are not highly correlated with each other. As long as people with a high level of political efficacy are exactly those who have complete democratic capacities, the democratic component would not make any substantial contribution to the original concept. Connecting the term of political efficacy to democratic capacities is meaningful if the latter makes relevant distinctions within categories of political efficacy and helps to differentiate between people with the same level of PE.

Using ESS data, a chi-squared independence test was performed to check whether the two categorical-level variables (PE and democratic capacities) are related in any way. The two components are not entirely independent of each other. A significant ($p < .001$) but modest (Cramer’s $V = .213$) relationship exists between the two-level democratic capacities component and the four-level political efficacy component. However, table 5 indicates that the democratic component yields a more nuanced picture of political efficacy. More precisely, the cells of table 5 provide different forms of democratic efficacy.

Table 5. The share of respondents of the ESS8 based on democratic efficacy (N=33,158)

Democratic capacities	Political efficacy				Total (as in table 4)
	High	Low	Paternalists	Sceptics	
Complete capacities	3.7 %	8.3 %	2.9 %	4.5 %	19.5 %
Incomplete capacities	6.6 %	52.9 %	11.1 %	9.9 %	80.5 %
Total	10.4 %	61.1 %	14.1 %	14.4 %	100%

Let us interpret the most interesting categories with a focus on populism: Almost two-thirds of the respondents with a high level of political efficacy have incomplete democratic capacities. In principle, those people are active in politics, although their democratic skills fall short of the democratic ideal. We assume that this group might be more open to populism than people with both high political efficacy and complete democratic capacities. Of course, here we took a very strict approach, placing together all the respondents who underperform in at least one capacity measure under the label “incomplete capacities”. It is very probable that the low value of a single capacity measure does not signal the same level of “incompleteness” as does a general lack of democratic capacities. Therefore, empirically speaking, it seems useful to create different categories of people with incomplete capacities according to the number of capacity measures they underperform in.

The category of people with incomplete capacities and low political efficacy is theoretically not so challenging: Those are the ones who are not interested in politics and probably have a low political activity level as well. However, they are very important from a policy perspective. The question is what could be done in order to increase their democratic skills and feelings of political efficacy? A related question is whether they are open to populist arguments or does their low interest in politics make them largely immune to populist arguments as well?

At the same time, a significant minority of people with a low level of political efficacy have complete democratic capacities. Those people are interested in politics, consume media, have high democratic values and are active in politics; however, they do not feel they can achieve change in politics. They seem to have a generally negative attitude towards politics and their role within it. It is also remarkable that a larger share of sceptics have complete democratic capacities than paternalist citizens. This is in line with the theoretical construct: We expect people with complete democratic capacities to believe in themselves and share a more sceptical attitude towards the political system. Again, a possible hypothesis is that those sceptical people with high democratic capacities might be open to populist arguments as they seem not to trust the political system.

Overall, the results make clear that the democratic component is suitable to introduce additional analytical distinction to the concept of political efficacy, which may help to capture behavioural outcomes more precisely.

Democratic Efficacy and Populism

In 2019, an original online survey was undertaken in 15 European countries (Germany, the UK, Czechia, Hungary, Italy, the Netherlands, Poland, France, Slovakia, Lithuania, Denmark, Turkey, Spain, Greece and Bosnia and Herzegovina) within the framework of the DEMOS project. Our desired representative sample size amounted to approximately five hundred respondents per country while quotas based on current census data were set up for gender, age and geographical region. The fundamental *eligibility criterion* for respondents was having lived in their current country of residence for at least ten years, which we consider a sufficient timeframe to feel at home in the country. The survey questionnaire was developed by the researchers of the DEMOS project and was administered by the University of Amsterdam.²⁰

20 We are grateful to David Abadi for his work preparing the dataset ready for analysis.

The survey included the usual measures of political efficacy and proxies for democratic capacities: follow news at least some days, are not extremely partisan (mean above 5), identify with democratic values (equality, tolerance, autonomy). The survey used a scale measuring populist attitudes, based on existing items by Castanho and Silva et al.,²¹ consisting of *people-centrism* (e.g., “Politicians should always listen closely to the problems of the people”), *anti-elitism* (e.g., “The political elites have failed to protect our cultural identity”) and *Manichaeian outlook* (e.g., “You can tell if a person is good or bad if you know their political views”). Finally, we added three items to measure *nativism* (such as “The political elites have failed to protect our cultural identity”). The ten items formed a reliable scale (alpha = .66).

Based on the data of this survey, we made a first attempt to use the concept of democratic efficacy as well as to test the association between democratic efficacy and populist attitudes. In our analysis we addressed the following:

Descriptive research questions

- RQ1. How are our respondents distributed among the categories of the political efficacy typology (i.e., high, low, paternalist, sceptics) by country?
- RQ2. What share of our respondents have complete democratic capacities, that is, follow news at least some days, are not extremely partisan (mean above 5), identify (or at least somewhat agree) with democratic values (equality, tolerance, autonomy) by country?
- RQ3. How are our respondents distributed among the categories of the democratic efficacy typology (i.e., political efficacy plus democratic capacities)?

Inferential research questions

- RQ4. What is the connection between external political efficacy and populist attitudes?
- RQ5. What is the connection between internal political efficacy and populist attitudes?
- RQ6. What is the connection between democratic capacities (complete vs incomplete) and populist attitudes?
- RQ7. What is the connection between the typology of democratic efficacy and populist attitudes?

Findings

RQ1. How are our respondents distributed among the categories of the political efficacy typology (i.e., high, low, paternalist, sceptics) by country?

Both EPE and IPE are constructed from two items respectively by taking their average. All four items are measured on a 7-point Likert scale where the larger values indicate a higher level of efficacy. Mean values above 4 are considered a “high” level and under 4 are a “low” level of efficacy. As our goal is to test hypotheses related to the different types of democratic efficacy; respondents who were placed at the middle value (4) in each of the constructed EPE or IPE variables were not considered in the typology (45.5% of respondents), but their share is also reported by country.

21 Bruno Castanho Silva, Sebastian Jungkunz, Marc Helbling, and Levente Littvay, “An Empirical Comparison of Seven Populist Attitudes Scales,” *Political Research Quarterly* 73, no. 2 (2020): 409–424.

As indicated in table 6, 41.8% of respondents have a low level of political efficacy, while 24.7% of them are efficacious. As for the mixed types, more than a fourth of the citizenry has a high level of internal and a low level of external political efficacy, thereby they can be labelled as sceptics, whereas only an 8% of them are paternalist, that is, have a low level of internal and a high level of external political efficacy. However, there are remarkable variations between countries. In the CEE (except Lithuania) and some Mediterranean countries (Italy, Greece, France), the share of people with a high level of PE is smaller, while they have a larger share of people with low PE than in Western European countries. The proportion of paternalists is higher in Lithuania, Czechia, Turkey and Greece, while the most sceptical respondents were found in Bosnia, Slovakia, Denmark and the United Kingdom.

Table 6. Share of respondents based on the level of their political efficacy by country and mean values of external and internal efficacy (incl. cases with middle values) by country (last two columns)

Country	Political efficacy (%)				Resp. on middle value on each variable	EPE	IPE	N
	High	Low	Paternalists	Sceptics		Mean		
Germany	35%	40%	5%	20%	37%	3.61	4.22	476
UK	32.4%	32.8%	4.3%	30.5%	40.1%	3.64	4.37	937
Czechia	11.6%	56.4%	12.2%	19.8%	38%	3.29	3.53	529
Hungary	8.7%	64.6%	6.3%	20.5%	29.4%	2.82	3.39	540
Italy	23.4%	43.7%	8.3%	24.6%	37.1%	3.45	3.95	517
Netherlands	39.1%	30.6%	5.8%	24.5%	41.8%	3.74	4.36	505
Poland	21.8%	48.7%	8.2%	21.2%	38.5%	3.33	3.78	514
France	23.1%	53.4%	7.2%	16.3%	39.3%	3.44	3.77	506
Slovakia	14.5%	44.9%	9.5%	31.1%	37.9%	3.36	4.01	523
Lithuania	35.4%	30.1%	13%	21.4%	38%	3.90	4.17	519
Denmark	44.3%	18%	7%	30.6%	34.1%	3.95	4.56	496
Turkey	26.1%	33.6%	12.1%	28.3%	35.1%	3.60	4.28	473
Spain	32.5%	34.4%	9.8%	23.3%	36.5%	3.69	4.10	499
Greece	15.1%	45.1%	10.4%	29.4%	31.2%	3.29	3.90	519
Bosnia and Herzegovina	8.6%	51.7%	2%	37.7%	30.8%	2.79	3.92	506
TOTAL	24.7%	41.8%	7.9%	25.6%	36.5%	3.46	4.03	8,059

RQ2. What share of our respondents have complete democratic capacities, that is, follow news at least some days, are not extremely partisan (mean above 5), identify (or at least somewhat agree) with democratic values (equality, tolerance, autonomy) by country?

There are slightly more people in our sample who have incomplete democratic capacities, but more than 46.4% of our respondents have complete democratic capacities (DC; see table 7). It is difficult to find clear geographical patterns behind the country-level variations, but it is noticeable that in Mediterranean countries (Greece, Bosnia, Spain, Italy) more people have complete democratic capacities than in other countries. It is also interesting that in some Western European countries, the proportion of people with complete DC is rather low (Denmark, Netherlands, France).

Table 7. Share of respondents based on the level of democratic capacities by country

Country	Democratic capacities		N
	Incomplete	Complete	
Germany	49.4%	50.6%	476
UK	50.5%	49.5%	937
Czechia	70.1%	29.9%	529
Hungary	57%	43%	540
Italy	52.8%	47.2%	517
Netherlands	63.4%	36.3%	505
Poland	59.1%	40.9%	514
France	58.1%	41.9%	506
Slovakia	59.3%	40.7%	523
Lithuania	38.7%	61.3%	519
Denmark	63.9%	36.1%	496
Turkey	56.2%	43.8%	473
Spain	47.5%	52.5%	499
Greece	37.6%	62.4%	519
Bosnia-Herzegovina	43.1%	56.9%	506
TOTAL	53.6%	46.4%	8,059

Looking at the bivariate correlation between different components of democratic capacities, it seems that partisanship is an outlier component (see table 8). While there is a significant positive relationship between news consumption and the values of equality, tolerance and autonomy, non-partisanship is significantly and negatively correlated with each of them. Those who consume news at least some days are more likely to agree with the values of equality, tolerance and autonomy. At the same time, less partisan people consume news infrequently, and they are more likely to be neutral or negative with these values. The strongest correlation is found between the three democratic values.

Table 8. Bivariate correlations between the components of democratic capacities (N = 8,059)

	News cons.	Non-partisanship	Equality	Tolerance	Autonomy
News consumption		-.132**	.075**	.111**	.096**
Non-partisanship			-.064**	-.075**	-.058**
Equality				.430**	.427**
Tolerance					.481**

Note: * p < .05, ** p < .01, *** p < .001

RQ3. How are our respondents distributed among the categories of the democratic efficacy typology (i.e., political efficacy plus democratic capacities)?

Just one in ten people have both complete democratic capacities and a high level of political efficacy (see table 9). On the other end of the typology, 21% of respondents have both incomplete democratic

capacities and a low level of political efficacy. Interestingly enough, a large share of respondents with low political efficacy have complete democratic capacities, while 13% of respondents have both a high level of political efficacy and incomplete capacities. Half of the sceptics have complete and the other half have incomplete democratic capacities.

Table 9. The share of respondents at the intersections of democratic capacities and political efficacy (N = 5,117)

Democratic capacities	Political efficacy				Total
	High	Low	Paternalists	Sceptics	
Complete democratic capacities	11.2%	20.6%	4.2%	12.8%	49.1%
Incomplete capacities	13.2%	21.2%	3.7%	12.8%	50.9%
Total	24.7%	41.8%	7.9%	25.6%	100%

RQ4. What is the connection between external political efficacy and populist attitudes?

The scale of populist attitudes is constructed by averaging the measures of populism. External political efficacy and populist attitudes are significantly and negatively correlated, and the effect size is fairly remarkable. People with a low level of external political efficacy have more populist attitudes ($p < 0.001$; Pearson's $r = -0.375$).

RQ5. What is the connection between internal political efficacy and populist attitudes?

Internal political efficacy is also significantly and negatively related to populist attitudes, but here the effect size is much smaller; only a weak relationship exists between the variables. However, people with a low level of internal political efficacy have slightly more populist attitudes ($p < 0.001$; Pearson's $r = -0.046$).

RQ6. What is the connection between democratic capacities (complete vs incomplete) and populist attitudes?

A weak but significant negative association exists between democratic capacities and populist attitudes as well. People with incomplete democratic capacities are more likely to have populist attitudes ($p < 0.01$; Pearson's $r = -0.032$). At the same time, when looking at the bivariate correlations between the components of democratic capacities and populist attitudes, it is apparent that not all the capacity measures perform the same way in terms of their relationship to populism (table 10).

Table 10. Bivariate correlations between the components of democratic capacities and populism

Democratic capacities	Populism
News consumption	.009
Non-partisanship	-.165**
Equality	.136**
Tolerance	.121**
Autonomy	.222**

Interestingly, democratic values are significantly and positively correlated with populist attitudes. It seems that democratic values and populist attitudes are not mutually exclusive. The only democratic capacity that significantly decreases populist attitudes is non-partisanship; the component is signifi-

cantly negatively associated with the other democratic components. Citizens who are not extremely partisan are less likely to identify with populist attitudes. News consumption is not significantly associated with populism, but when its interval variety is considered, there is a small ($r = 0.051$) but significant ($p < 0.001$) relationship between the two variables showing that more frequent news consumption is correlated with less populist attitudes.

RQ7. What is the connection between the typology of democratic efficacy and populist attitudes?

Table 11 shows the mean values of populist attitudes for each category of democratic efficacy. It seems that the most populist subcategories are sceptic people with incomplete democratic capacities, followed by those with “incomplete capacities with low PE” and “complete capacities with low PE”. The less populist respondents are those who have complete democratic capacities and a high level of political efficacy. Interestingly enough, paternalists are also less populist; moreover, paternalists with incomplete democratic capacities are even slightly less populist than those with complete capacities.

Table 11. Mean values of populist attitudes by category of democratic efficacy. (Standard deviations are in parentheses; N=5,117)

Democratic efficacy	Populist attitudes
Incomplete capacities with low PE	5.05 (.66)
Complete capacities with low PE	5.02 (.65)
Incomplete capacities with paternalist PE	4.48 (.74)
Complete capacities with paternalist PE	4.56 (.64)
Incomplete capacities with sceptic PE	5.11 (.67)
Complete capacities with sceptic PE	4.82 (.78)
Incomplete capacities with high PE	4.69 (.76)
Complete capacities with high PE	4.38 (.74)
TOTAL	4.88 (.73)

Conclusions

In our chapter we presented the concept of democratic efficacy as a construct based on the quantification of political efficacy and democratic capacities. The concept of democratic efficacy is two dimensional and, therefore, should not be conceived of as a simple addition of political efficacy and the measurement of democratic capacities.

Our assumption is that democratic efficacy might be a useful conceptual innovation in order to analyse and better understand the political profile of people holding populist attitudes. We believe that our first results illustrate that this is indeed the case. Using the concept of democratic efficacy, we can draw a nuanced picture of populist attitudes.

First, it seems that people with higher political efficacy are less prone to populist sentiments. This is in line with our expectations, just as the fact that the negative correlation is stronger in case of external political efficacy. This is hardly surprising if we assume that populism is a sign of discontent with politics given that external political efficacy is about trust in the political system.

Second, overall, democratic capacities also show a weak but significant negative association with populist attitudes. People with incomplete democratic capacities are more likely to have populist attitudes.

Third, the negative relationship does not hold for all democratic capacity measures. For instance, people with populist attitudes do share basic democratic values. However, non-partisanship is negatively associated with populism.

Fourth, combining political efficacy and democratic capacity, we find that people with the strongest populist attitudes are “sceptic people with incomplete democratic capacities”, followed by those in the “incomplete capacities with low PE” and “complete capacities with low PE” categories. The less populist respondents are those who have complete democratic capacities and a high level of political efficacy. This latter finding, together with the finding that sceptic people with incomplete democratic capacities show the strongest populist attitudes, is in line with our expectations and shows that populism is generally associated with discontent with politics and diminished democratic capacities. However, the combinations of political efficacy and democratic capacities as well as their relationship with populism show a considerable variation, suggesting that populism is a complex phenomenon. If we want to understand it better, we should refrain from easy simplifications.²²

22 This paper has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 822590. Any dissemination of results here presented reflects only the author’s (or the authors’) view. The Agency is not responsible for any use that may be made of the information it contains.

The COVID-19 Related Communication of Italian Politicians and Its Success on Facebook

ARTURO BERTERO¹

Populism, Social Media and the COVID-19 Pandemic

This chapter aims to analyse the communicative performances of Italian political leaders on Facebook during the COVID-19 pandemic. Therefore, a definition of populism is required, and social network sites must be understood as part of a hybrid media system. Following these definitions, COVID-19's impact on Italy will be discussed.

Populism is a contested concept that divides academics and causes massive debates.² There are three main approaches to studying the phenomenon: as an ideology,³ as a political strategy⁴ or as a political communication style. This article will adopt the latter definition of populism, describing it as a "master frame" that politicians can use to discuss every political issue.⁵ Populists exhibit closeness to the people and adopt political discourses that feature three main elements: an appeal to the people, an attack against the elites and the ostracization of a social or political minority. The first element is necessary but not sufficient to describe an actor as populist. The other elements can be combined, generating different varieties of populism: excluding populism (only discriminating a social minority), anti-elitist populism (criticizing the elites), empty populism and complete populism (respectively characterized by only referring to the people or by adopting all the elements). The main advantage of this definition is that it guarantees the strong operationalization of the concept.

Even if the definition of populism is itself conflictual, the individuation of its causes is generally less controversial. Most academics claim that populism emerges only in the presence of several structural conditions that allow political leaders to intervene with their agency. Another general claim is that the media plays a role in populism's growth, but only as an intervenient variable which cannot be substituted by structural ones.⁶ Among these structural factors, crises are the most studied. Many authors argue that neoliberal ideology is undergoing a crisis, leading to a diffusion of populism.⁷ Others focus

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- 1 This paper has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 822590. Any dissemination of results here presented reflects only the author's (or the authors') view. The Agency is not responsible for any use that may be made of the information it contains.
 - 2 Cas Mudde and Cristóbal Rovira Kaltwasser, *Populism: A very short introduction* (Oxford: Oxford University Press: 2017).
 - 3 Cas Mudde, "The Populist Zeitgeist," *Government and Opposition* 39, no. 4 (2004): 541–563; Ben Stanley, "The thin ideology of populism," *Journal of political ideologies* 13, no. 1 (2008): 95–110.
 - 4 Kurt Weyland, "Clarifying a contested concept: Populism in the study of Latin American politics," *Comparative Politics* 34, no. 1 (2001): 1–22.
 - 5 Jan Jagers and Stefaan Walgrave, "Populism as political communication style," *European Journal of Political Research* 46, no. 3 (2007): 319–345.
 - 6 Gianpetro Mazzoleni, "Populism and the media," in *Twenty-first century Populism. The Spectre of Western European Democracy*, ed. Daniele Albertazzi and Duncan McDonnell (London: Palgrave Macmillan, 2008), 49–64.
 - 7 Ernesto Laclau, *On Populist Reason* (London: Verso, 2005); Paolo Gerbaudo, "Social media and populism: an elective affinity?" *Media, Culture & Society* 40, no. 5 (2018): 745–753.

more on political representation crises⁸ or economic depression as triggers of populist movements.⁹ However, these scholars use different definitions of “crises”; therefore, the link between populism and crisis must be examined more closely.¹⁰ Moreover, as discussed later, COVID-19 represents a peculiar crisis in many respects.

A growing number of studies focus on the relationship between populism and social media since their interactivity allows populists to strengthen the link between them and their audiences.¹¹ A pioneering study has shown that, on social media, populists tend to fragment populist discourse, rarely resorting to “complete populism”, preferring to rely on one of the three elements.¹² In the Italian context, populist elements guarantee better performances on Facebook,¹³ and populist discourse has gone mainstream, being adopted even by mainstream leaders,¹⁴ according to populist zeitgeist theory.¹⁵ Theoretically, there is an elective affinity between populism and social network sites: Social media is a powerful tool for populist leaders, using it to unite and persuade a multitude of atomized individuals who are disappointed and disillusioned by the hegemony of neoliberal ideology.¹⁶

Social network sites (SNS) must be understood as a fraction of the hybrid media system now characterizing Western democracies.¹⁷ This system is the result of a process through which traditional media logic¹⁸ – characteristic of the second phase of political communication – becomes just one of the different logics at play in the political communication arena. First, as the mediatization of politics advance, traditional media logic, driven by commercial values and entertainment purposes, must confront itself with political logic.¹⁹ Second, mass self-communication technologies have emerged,²⁰

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- 8 Giuliano Bobba and Duncan McDonnell, “Italy: a strong and enduring market for populism,” in *European Populism in the Shadow of the Great Recession*, ed. Hanspeter Kriesi and Takis S. Pappas (Colchester: ECPR Press, 2015), 163–179; Peter Mair, *Ruling the Void: The hollowing of Western democracy* (London: Verso Trade, 2013), 17–20.
 - 9 Hanspeter Kriesi and Takis S. Pappas (eds.), *European populism in the shadow of the great recession* (Colchester: ECPR Press, 2015).
 - 10 Cas Mudde, *Populist Radical Right Parties in Europe* (Cambridge: Cambridge University Press, 2007); Bobba and Hubé forthcoming.
 - 11 Jamie Bartlett, “Populism, social media and democratic strain,” in *European populism and winning the immigration debate*, ed. Clara Sandelind (Stockholm: FORES, 2014), 99–114.
 - 12 Sven Engesser, Nicole Ernst, Frank Esser and Florin Büchel, “Populism and social media: How politicians spread a fragmented ideology,” *Information, communication & society* 20, no. 8 (2017): 1109–1126.
 - 13 Giuliano Bobba and Franca Roncarolo, “The likeability of populism on social media in the 2018 Italian general election,” *Italian Political Science* 13, no 1 (2018): 51–62; Giuliano Bobba, “Social media populism: Features and ‘likeability’ of Lega Nord communication on Facebook,” *European Political Science* 18, no. 1 (2019): 11–23.
 - 14 Gianpetro Mazzoleni and Roberta Bracciale, “Socially mediated populism: the communicative strategies of political leaders on Facebook,” *Palgrave Communications* 4, no. 1 (2018): 1–10.
 - 15 Mudde, “The Populist Zeitgeist.”
 - 16 Paolo Gerbaudo, “Social media and populism: an elective affinity?” *Media, Culture & Society* 40, no. 5 (2018): 745–753.
 - 17 Andrew Chadwick, *The Hybrid Media System: Politics and Power* (Oxford: Oxford University Press, 2017).
 - 18 David L. Altheide, “Media logic,” *The International Encyclopedia of Political Communication*, ed. Gianpetro Mazzoleni, Kevin G. Barnhurst, Ken’ichi Ikeda, Rousiley C. M. Maia, and Hartmut Wessler (Chichester, Malden: John Wiley & Sons, 2015), 1–6.
 - 19 Gianpetro Mazzoleni and Winfried Schulz, “‘Mediatization’ of politics: A challenge for democracy?” *Political Communication* 16, no. 3 (1999): 247–261; Jesper Strömbäck, “Four phases of mediatization: An analysis of the mediatization of politics,” *The International Journal of Press/Politics* 13, no. 3 (2008): 228–246.
 - 20 Manuel Castells, *Communication Power* (Oxford: Oxford University Press, 2009).

ushering in a third era of political communication.²¹ SNS are characterized by a rationality that is effectively labelled as network logic.²² The differences between media and network logic could be better illustrated in terms of three analytical dimensions. Traditional media production, based on professional journalistic structures, is driven by news values and economic interests. Theoretically, network logic allows users to become *prosumers*,²³ committed to *produsage* activities.²⁴ Consequently, content production is less directed by news values and depends more on personal interests, even if platform structures still represents content constraints²⁵.

Media distribution was mainly based on media companies acting as gatekeepers, deciding which fact to transform into news; distribution on a social network is instead based on technological infrastructures that allow spreadable content²⁶ to flow through homophilic networks,²⁷ where each user is an intermediary rather than a gatekeeper. Media use was characterized by a mass audience, mass consumers and limited selective exposure. On social media, users are less influenced by spatial distances. Network logic makes it easier to distribute the same information to homophilic groups consisting of geographically distant individuals, strengthening the role of confirmation bias²⁸ and often leading to echo chambers.²⁹ Inside network logic, social and technological forces are intertwined and impossible to disentangle. Network, political and media logics – in its social and technological dimension – must be intended as ideal types, convenient when it comes to simplifying the complex flux of relationships occurring between politicians, media and citizens. It is precisely the interactions between these logics that constitute the hybrid media system.

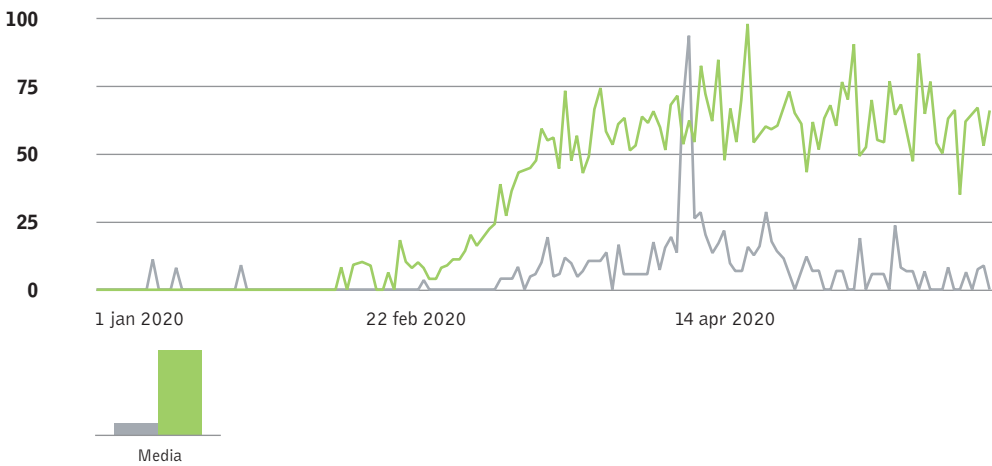
This chapter studies Italian politicians' Facebook performances during a period heavily influenced by the COVID-19 pandemic. The first case in Italy was recorded on 30 January 2020. The pandemic was considered a public security challenge only after a huge outbreak in Lombardy on 17 February. In the days that followed, several other outbreaks occurred, prompting a political reaction that led to a countrywide lockdown on 11 March. COVID-19's impact on Italy at the time was drastic: It caused more than 33,000 deaths and more than 250,000 cases were recorded, creating a gigantic burden on the Italian health care system. For Italian politicians, COVID-19 was an issue too big and too salient to be ignored; therefore, Italian politicians adapted their communication strategy to the pandemic so as to exploit it, reaching consensus.

In light of the literature previously examined, this crisis should have been an opportunity mainly for populists. However, during the outbreak, the COVID-19 pandemic was a peculiar crisis since it was primarily related to medical science and thus was managed by doctors and experts. To exploit the

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- 21 Jay. G. Blumler and Dennis Kavanagh, "The third age of political communication: Influences and features," *Political Communication* 16, no. 3 (1999): 209–230.
- 22 Ulrike Klinger and Jakob Svensson, "The emergence of network media logic in political communication: A theoretical approach," *New Media & Society* 17, no. 8 (2015): 1241–1257.
- 23 Alvin Toffler, *The Third Wave* (New York: Bantam Books, 1980).
- 24 Axel Bruns, *Blogs, Wikipedia, Second Life, and Beyond: From production to Produsage* (Vol. 45 of *Digital Formations*, New York: Peter Lang, 2008).
- 25 As an emblematic example, one can think of the difference between a tweet and a Tik Tok video.
- 26 Henry Jenkins, Sam Ford, and Joshua Green, *Spreadable Media: Creating Value and Meaning in a Networked Culture* (New York: NYU Press, 2018).
- 27 Miller McPherson, Lynn Smith-Lovin and James M. Cook, "Birds of a feather: Homophily in social networks," *Annual review of sociology* 27, no. 1 (2001): 415–444.
- 28 Raymond S. Nickerson, "Confirmation bias: A ubiquitous phenomenon in many guises," *Review of General Psychology* 2, no. 2 (1998): 175–220.
- 29 Walter Quattrociocchi, Antonio Scala, and Cass R. Sunstein, "Echo chambers on Facebook," *SSRN Electronic Journal*, 2016, available at https://papers.ssrn.com/sol3/papers.cfm?abstract_id=2795110.

COVID-19 pandemic, populists had to politicize it, transforming a social crisis into a political issue³⁰. Therefore, this chapter postulates that, when facing the pandemic, Italian politicians adopted different strategies. Populists tried to politicize the crisis, whereas mainstream leaders tried to keep the pandemic issue depoliticized. This politicization of COVID-19 required time but was almost unavoidable after the adoption of the national lockdown when the pandemic’s frame inevitably shifted from a health dimension to an economic one. At the national level, Italian politicians fought to determine the entity and the economic beneficiaries. At the European level, every nation participated in the discussion regarding financial aid and the European Stability Mechanism (ESM). For their part in the debate, Italian populists criticized the ESM, while mainstream leaders supported it. As figure 1 shows, the dispute had arisen in March, when the lockdown was already adopted. The apex of this process was reached on 10 April 2020 when news items on the ESM outnumbered even the COVID-19 related reporting.

Figure 1. Google Trends data for ESM³¹ mentions (in grey) and COVID-19 mentions (green) in Italian news



In light of these elements, the pandemic can be divided into two main phases. The first phase (21 January to 11 March) began with the first huge outbreak in Lombardy and ended with the nationwide lockdown. The second phase (11 March to 10 April) began with the lockdown and ended when discussions of the ESM reached their apex. In terms of this temporal division, two hypotheses are proposed:

Hypothesis 1. In the first phase, the pandemic is not politicized as it presented itself as a health crisis; mainstream politicians will overperform in terms of likes, comments and shares.

Hypothesis 2. In the second phase, the crisis is politicized since the public debate focuses on its economic dimension; at this stage, populists will overperform in terms of likes, comments and shares.

30 Following Carl Schmitt’s *The concept of the Political: Expanded Edition* (Chicago: University of Chicago Press, 2008), an issue becomes politicized when it enters into the political sphere, that is, the battlefield of an intractable fight between two opposite factions which are impossible to unify.

31 The research was effectuated with the Italian acronym “MES”.

Data and Methods

The analyses in this chapter were conducted on a dataset containing all Facebook posts published by major Italian political leaders between the 18 January 2020 and 20 April 2020. The dataset is composed of 3,350 posts automatically downloaded through Crowdtangle. This data allows us to study Facebook performances before and after the pandemic's main phases as defined in the preceding paragraph.

Six leaders are examined: Three are populists, and three are mainstream; three are in government, and three are in opposition. Considering populism as a political communication style, Italy has three main populist parties: the Northern League (LN; Lega Nord), led by Matteo Salvini; the Five Star Movement (M5S; Movimento 5 Stelle), previously led by Di Maio and, since 22 January 2020, led by Vito Crimi; and the Brothers of Italy (Fdl; Fratelli d'Italia), led by Giorgia Meloni. The Northern League has been studied as a populist party starting with its establishment in the 1990s,³² through its transition phase when – led by Salvini – it became a national rather than regionalist party,³³ until the 2018 national election, when it formed a coalition government with M5S, with Giuseppe Conte as prime minister. However, due to a political crisis provoked by Salvini, this government ended in August 2019 when Conte was confirmed as prime minister of a second coalition government consisting of M5S, the Democratic Party (PD; Partito Democratico) and Italia Viva (IV; Italy alive). The second populist party M5S is one of the typical anti-establishment movements that flourished in Europe after 2000.³⁴ M5S declares itself as post-ideological and developed Rousseau, a website conceived as an online direct democracy tool.³⁵ During the COVID-19 pandemic, M5S was the only populist party in government. Fdl is a far-right party having recently recorded huge growth in terms of shares, and Meloni has recently been studied as an example of a female populist leader.³⁶ Chapel Hill Expert Survey data shows political and ideological similarities between Fdl and the Northern League since strong anti-elitist traits characterize both parties.³⁷ Moreover, Meloni skilfully exploited social media and memes to open a dialogue with the broader public using an unconventional media format. For example, in 2019, Meloni's political speech was remixed, becoming a trending video in Italy with more than ten million views on YouTube.

Italy's mainstream parties include Forza Italia (FI; Go Italy), PD and IV. Berlusconi is FI's founder, and he has been studied as a clear example of populism.³⁸ However, the same survey quoted above reveals that his communication can no longer be considered populist in respect to the anti-elitism and anti-establishment traits adopted. Moreover, in the 2018 elections, Berlusconi overtly depicted himself as the only alternative to populists.³⁹ PD, led by Zingaretti, is the biggest left-wing party even after

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- 32 Lorella Cedroni, "Lega Nord" in *I Partiti Italiani. Iscritti, Dirigenti, Eletti*, ed. Luciano Bardi, Pietro Ignazi and Oreste Massari (Milano: Università Bocconi Editore, 2007), 247–268.
 - 33 Danielle Albertazzi, Arianna Giovannini and Antonella Seddone, "No regionalism please, we are Leghisti! The transformation of the Italian Lega Nord under the leadership of Matteo Salvini," *Regional & Federal Studies* 28, no. 5 (2018): 645–671.
 - 34 Lorenzo Mosca and Filippo Tronconi, "Beyond left and right: the eclectic populism of the Five Star Movement," *West European Politics* 42, no. 6 (2019): 1258–1283.
 - 35 Roberto D'Alimonte, "How the populists won in Italy," *Journal of Democracy* 30, no. 1 (2019): 114–127.
 - 36 Donatella Campus, "Female Populist Leaders and Communication: Does Gender Make a Difference?" *Perspectives on Populism and the Media: Avenues for Research* 7 (2020): 235–252.
 - 37 Ryan Bakker, Liesbet Hooghe, Seth Jolly, Gary Marks, Jonathan Polk, Jan Rovny, Marco Steenbergen, and Milada Anna Vachudova, "2019 Chapel Hill Expert Survey," Chapel Hill, NC: University of North Carolina, 2019, available at <https://www.chesdata.eu/2019-chapel-hill-expert-survey>.
 - 38 Andrej Zaslove, "Here to stay? Populism as a new party type," *European Review* 16, no. 3 (2008): 319–336.
 - 39 Franca Roncarolo and Cristina Cremonesi, "Journalistic Narratives and Political Communication Strategies Against the Background of a Critical Mood: The 2018 Election Campaign in the Traditional Media and Beyond," in *The Italian General Election of 2018*, ed. Luigi Ceccarini and James L. Newell (Cham: Palgrave Macmillan, 2019), 191–215.

a split the saw Matteo Renzi – the former prime minister – found IV, a centrist and personal party. Together with M5S, PD and IV have been in government throughout the COVID-19 crisis (as of this writing). This government is led by Giuseppe Conte, whose Facebook account will be analysed at the end of the next paragraph.

Regarding the dataset, some specifications are necessary. First, even if Di Maio is no longer M5S’s leader, we preferred to analyse his account rather than Crimi’s. This choice is primarily motivated by the institutional and media relevance which Di Maio, unlike Crimi, has in the Italian political landscape. Moreover, the management of Crimi’s account is less professionalized, and, above all, it publishes a small number of posts, making statistical analysis fragile. Additionally, this dataset has two main disadvantages. Firstly, Facebook users are not a representative sample of the Italian population, and this prevents generalizing the results of this article. Secondly, in the first paragraph, SNS were discussed and defined in the context of a hybrid media system; using only Facebook data, the theoretical standpoint of the analysis is betrayed. We used other data sources to compensate for this shortcoming: In the preceding paragraph, Google Trends was used to establish the apex of ESM-related news; and in the conclusion, private survey data will be used for some considerations. The statistical analysis uses the number of likes (and reactions), comments and shares obtained by each leader on their Facebook posts as dependent variables. Table 1 shows some descriptive statistics about the performances of these pages.

Table 1. Descriptive statistics of leaders’ performances (in terms of likes and reactions)

Descriptive statistics				
Variable	Obs	Media	Min	Max
Di Maio	382	14,623	2,489	145,790
Salvini	1,505	16,045	1,591	131,283
Meloni	630	14,172	1,050	198,077
Renzi	231	5,361	0	48,418
Zingaretti	388	1,024	0	38,284
Berlusconi	241	1,733	433	53,837
N	3,350			

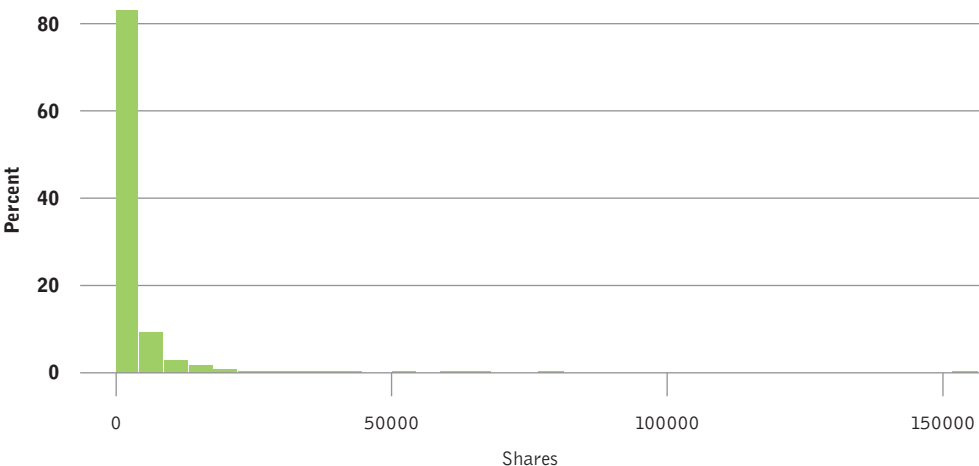
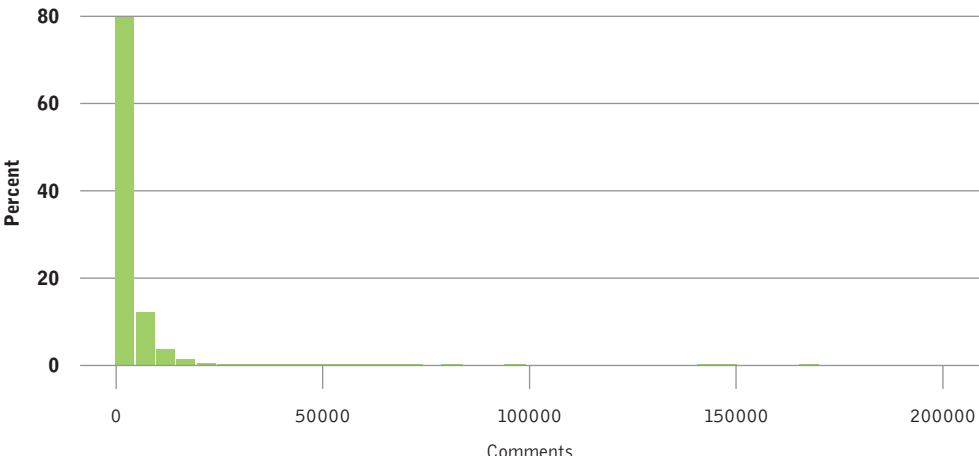
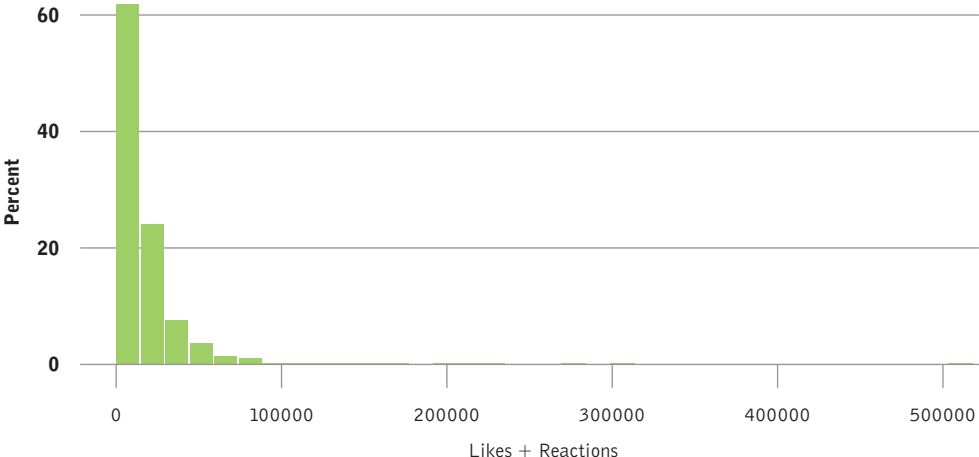
The leaders’ accounts are very different in terms of fanbases and number of posts published during the designed period. Thus, their average post garners different success as regards likes, comments and shares. To ensure the comparability of every item in the dataset, it is therefore necessary to standardize the three dependent variables, as shown in figure 2, for the variable generated from the sum of likes and reactions.

Figure 2. Standardization formula applied to the first dependent variables

$$\frac{\text{Likes + Reactions} - \text{mean (Likes + Reactions)}}{\text{sd(Likes + Reactions)}}$$

Moreover, as figure 3 shows, the frequency distribution of these three variables is not linear since a great number of posts obtained few likes, comments and reactions, whereas just a small number obtained great success.

Figure 3. Dependent variables' frequency distributions

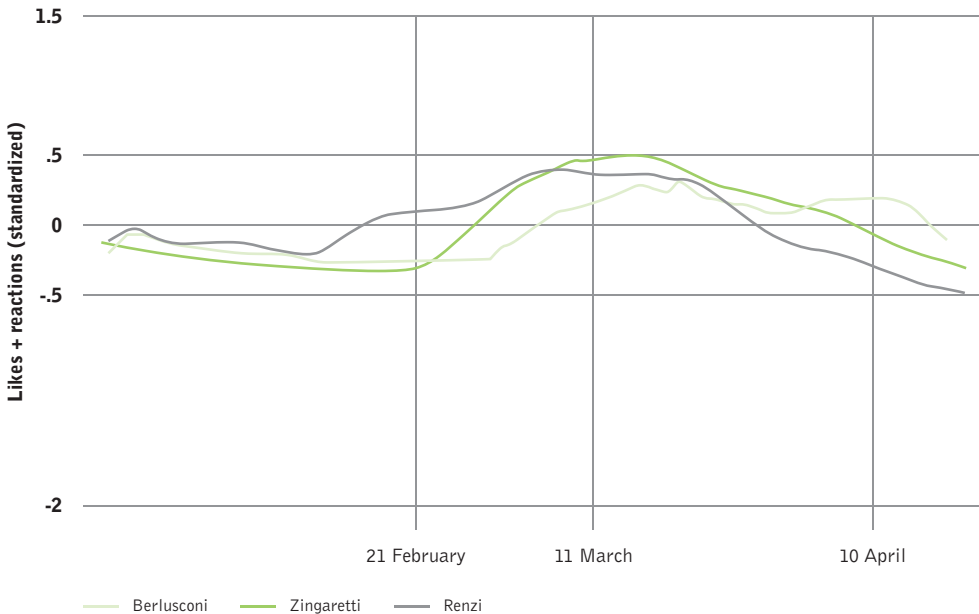


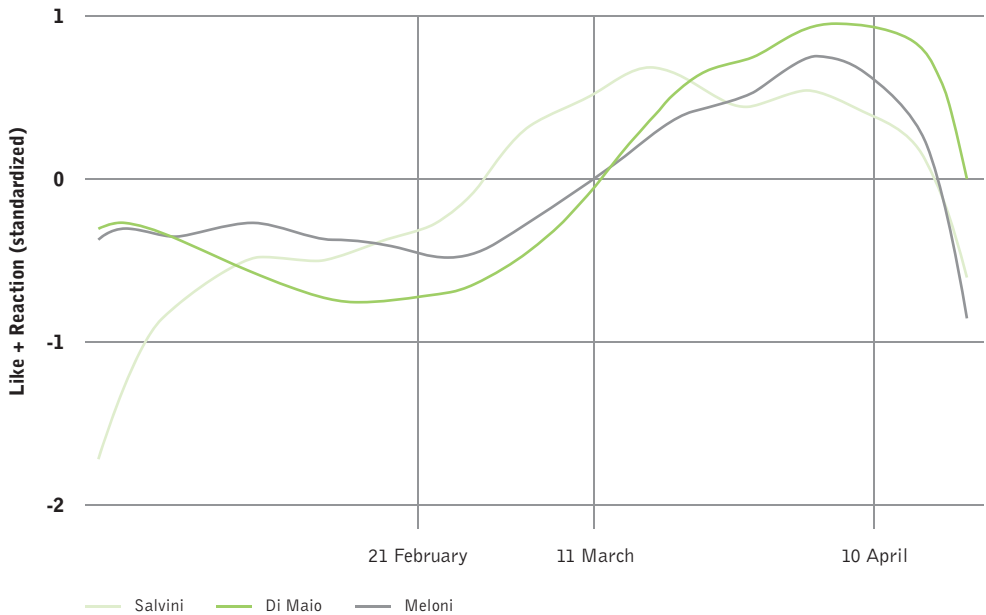
These frequency distributions and the hypothesis declared in the first paragraph determined the choice of statistical model used in this article. We decided to use LOWESS curves, an acronym that stands for locally weighted scatterplot smoothing. This technique produces a linear regression for each value recorded by each dependent variable. It then uses the regression lines identified in that way to produce the curve that best fits the trend of their values. The advantage of this tool is that the regression result is less influenced by outliers. The main disadvantage is that the extremes of the curves are not totally reliable; each point of the LOWESS curve is affected by the position of the adjacent points, and this implies that its initial and final segments are drawn upon weaker analysis. This technique will be used to perform three statistical models – one for each dependent variable – that will describe the chronological evolution of Facebook performances. Finally, another regression analysis will be presented to evaluate the statistical significance of the difference in performances obtained by each leader before and after the outbreak of the pandemic. This last model will be based on a linear regression because the analysis will be applied to the already standardized variables. All these procedures will be first applied to the parties’ leaders, comparing populists and mainstream performances. Lastly, they will be applied to Conte’s account.

Findings

Figures 4, 5 and 6 show the results of the LOWESS curves produced for each dependent variable. The axes represent the publication date of every Facebook post and its standardized score measured by the three variables. Since they were standardized, all the leaders’ curves are comparable.

Figure 4. Mainstream and populist performances (likes and reactions)

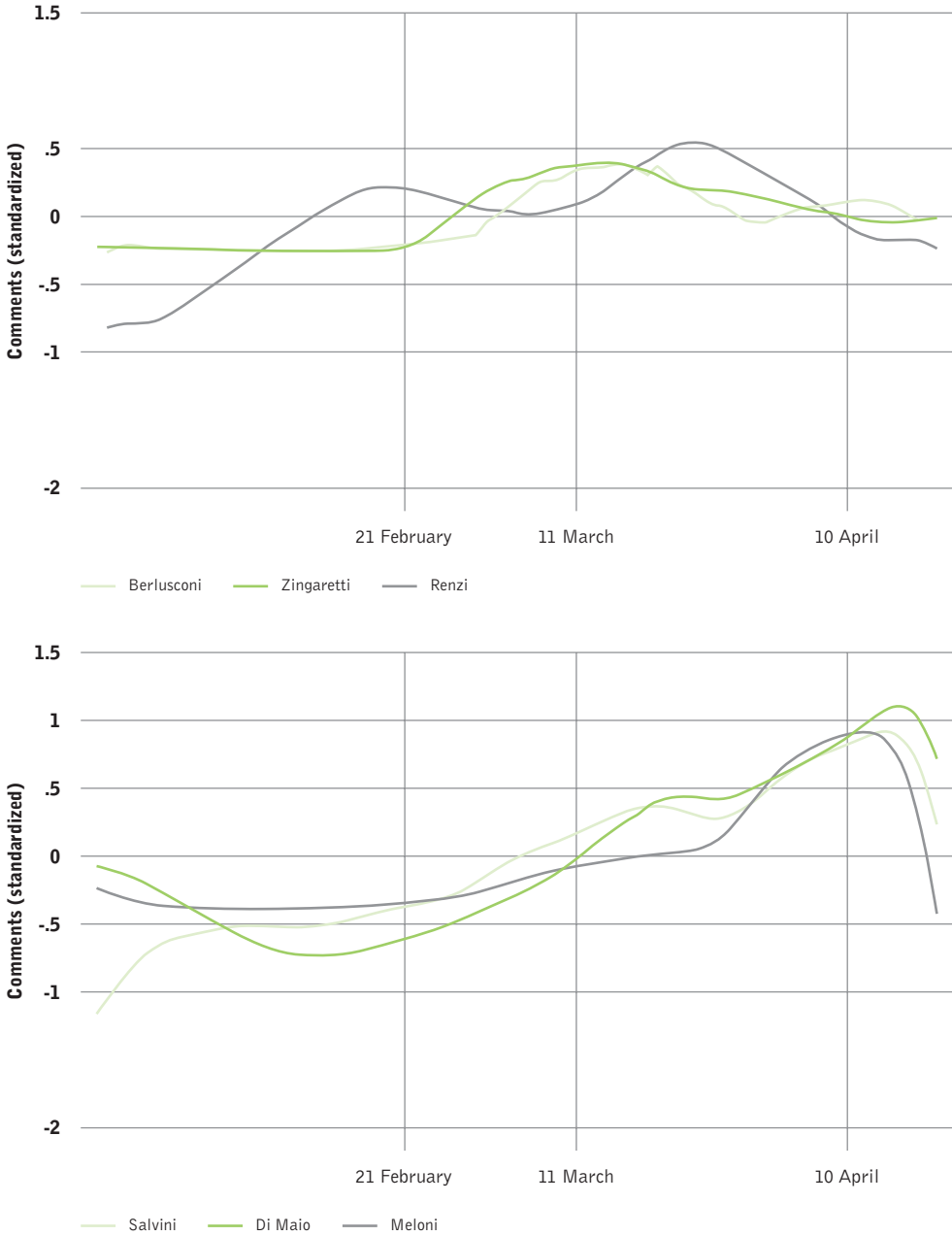




The first dependent variable measures the sum of likes and reactions obtained by each post in the dataset. From the LOWESS curves, a trend compatible with the research hypotheses emerges. Before 21 February, that is, before the outbreak of the pandemic, all Italian politicians' performances were below their average values. However, this is not a particularly pronounced trend, especially for mainstream leaders, who are very close to their "normal" performances. A partial exception is that recorded by Salvini, who consistently underperforms. However, his lowest scores occur in the initial days. As explained in the previous paragraph, this can be due to the statistical tool used. In the first phase, all the politicians improve their performances. However, the populist leaders' performances only weakly increase, and, among them, Salvini is the only one to overperform, obtaining more likes and reactions than the average. The increase is more substantial for mainstream leaders, who all overperform. Therefore, in the first phase, mainstream leaders overperform, while populists obtained weaker results, underperforming.

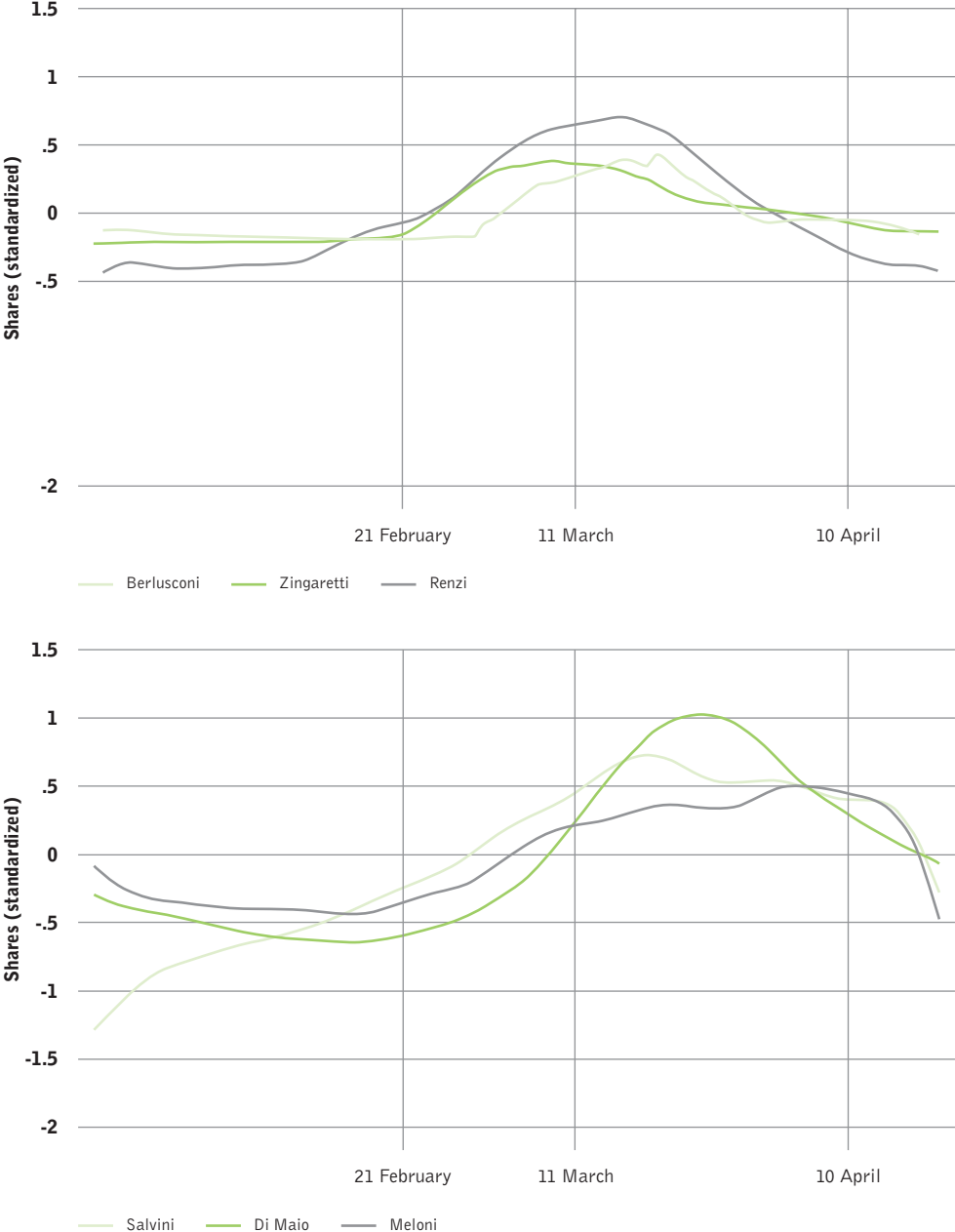
During the second phase, mainstream leaders' performances instead deteriorate and return closer to their average values. Conversely, populists considerably overperform, reaching an average number of likes and reactions almost in excess of one standard deviation of their average values. The peak of these performances tends to coincide with the apex of the ESM discussion that occurred on 10 April. After this date, the performances of Italian politicians seem to undergo a generalized decline.

Figure 5. Mainstream and populist performances (comments)



The LOWESS curves describing the comments obtained by each Facebook post (figure 5) show a similar, although less pronounced trend. In the first phase, Matteo Salvini is the only populist who overperforms. During this phase, all mainstream leaders overperform, albeit not in an accentuated way in terms of standard deviations. In the second phase, instead, their performances drop, while those of the populists reach similar levels, achieving one standard deviation higher than their average.

Figure 6. Mainstream and populist performances (shares)



The final LOWESS curves show a similar trend in shares. In the first phase, mainstream leaders slightly overperform, whereas the populist leaders' performances are below their average score. During the second phase, Berlusconi, Renzi and Zingaretti's performances do not substantially differ from their average scores; Salvini, Meloni and Di Maio are instead beneficiaries of steady growth in their performances.

The LOWESS curves can only describe the chronological evolutions of leader performances and, therefore, fail to assess whether the differences between the average post published by each leader before and after the pandemic is statistically significant. To ensure a more robust analysis, we carried out a linear regression for each dependent variable. The results are shown in figure 6, where the confidence interval is set at 95%. As described in the preceding section, the populists' performances improve after 11 March; the chart shows that all those differences are statistically significant, except for the difference in Meloni's performances measured by the comment variable. On the other side, mainstream leaders registered a lower increase in their performances, and those differences are never statistically significant. This result is particularly important because it partially prevents the analysis from adopting spurious relations: The variable that seems to be the most important to explain the variation in the dependent variables is the dichotomous populist/mainstream variable and not the variable in power / in opposition.

Figure 7. Statistical significance tests (likes and reactions)

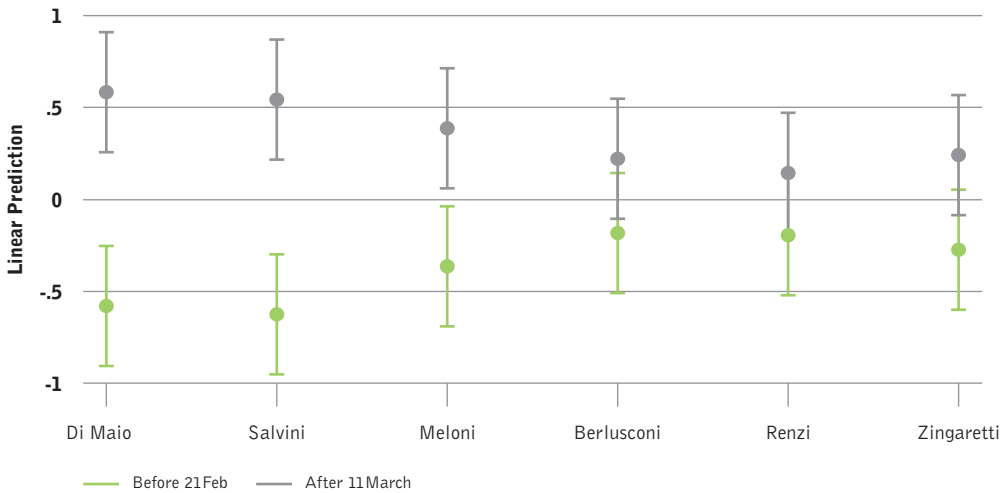


Figure 8. Statistical significance tests (comments)

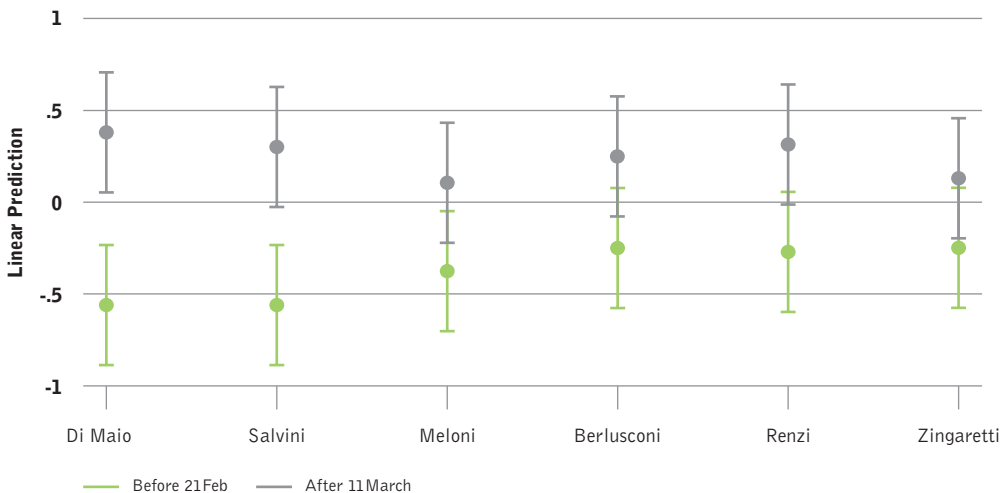
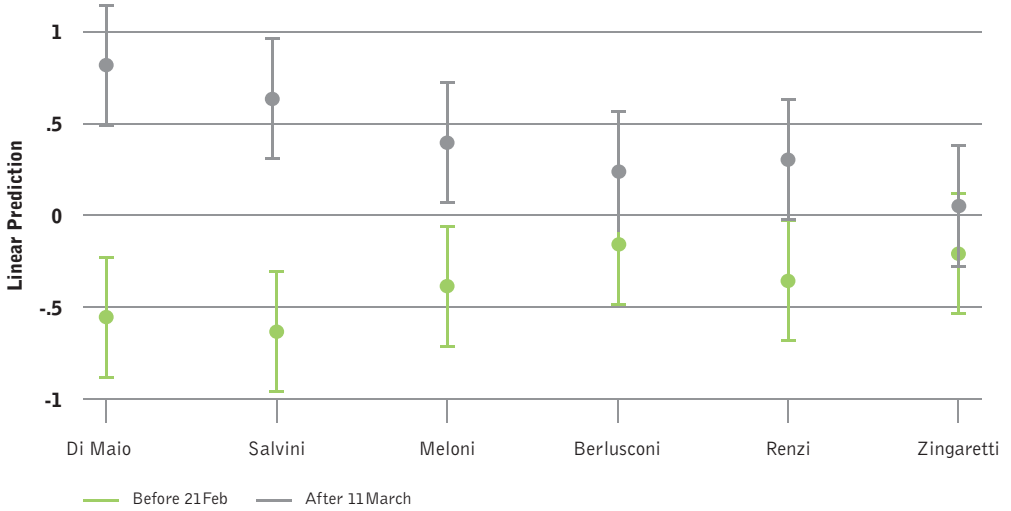


Figure 9. Statistical significance tests (shares)



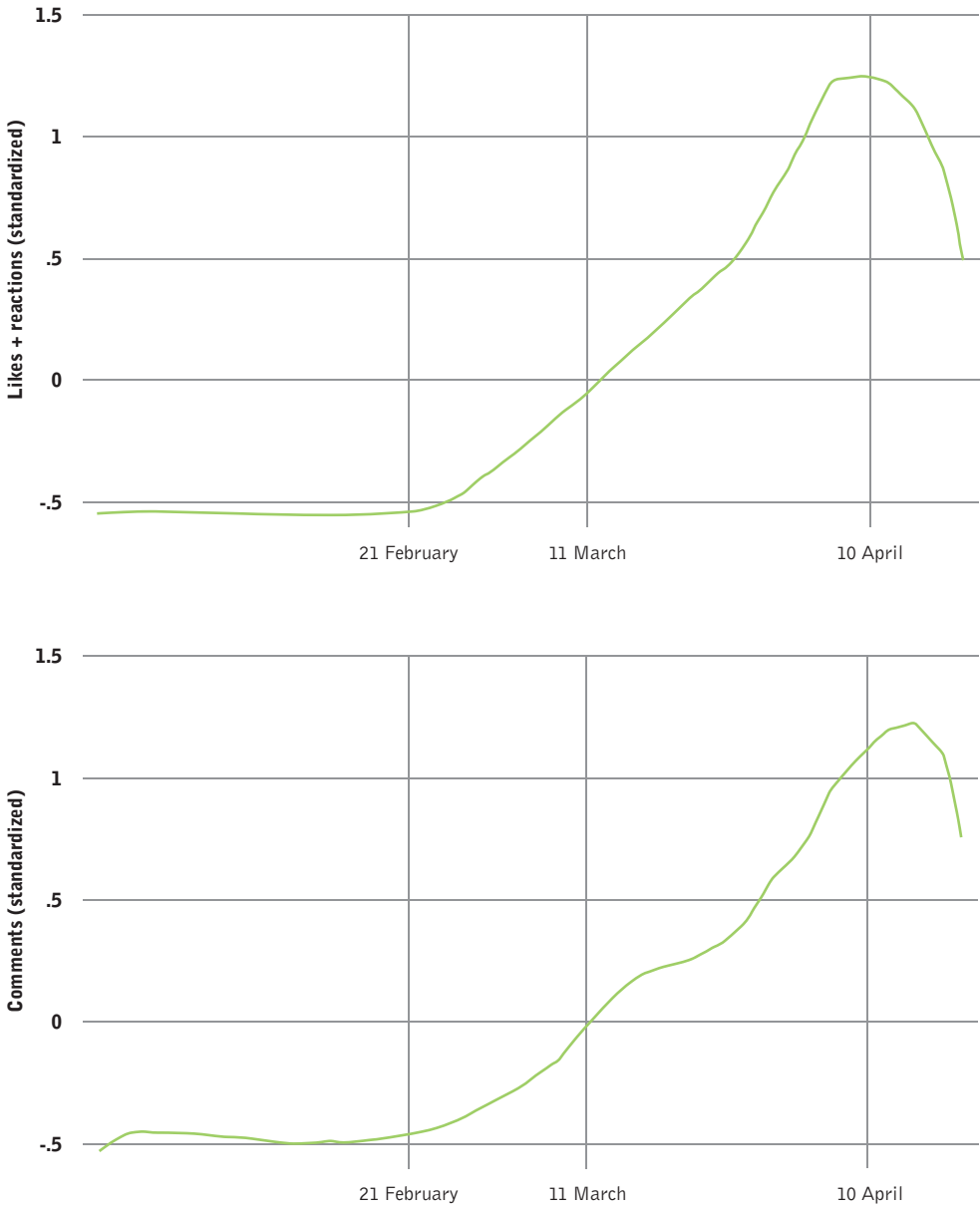
Prime Minister Giuseppe Conte does not follow the trends described in the previous sections. This is mainly due to the institutional role, which guarantees him considerable visibility and media coverage. Also, during the pandemic, he repeatedly announced “in advance” the content of government measures on his Facebook profile, which immediately became one of the most followed in the nation.

Table 2. Account growth during the COVID-19 pandemic

Account	18/01	18/01–23/02	Phase 1: 23/02–11/03	Phase 2: 11/03–20/04	Δ	Δ %
Conte	1,062,114	3,363	111,892	1,710,912	1,826,167	172%
Meloni	1,319,908	21,662	22,582	134,353	178,597	14%
Salvini	4,020,473	36,791	13,033	114,624	164,448	4%
Di Maio	2,206,005	-2,606	1,734	115,930	115,058	5%
Zingaretti	300,858	1,927	10,995	6,997	19,919	7%
Berlusconi	1,058,705	522	-1,061	11,380	10,841	1%
Renzi	1,152,179	3,467	2,502	4,646	10,615	1%

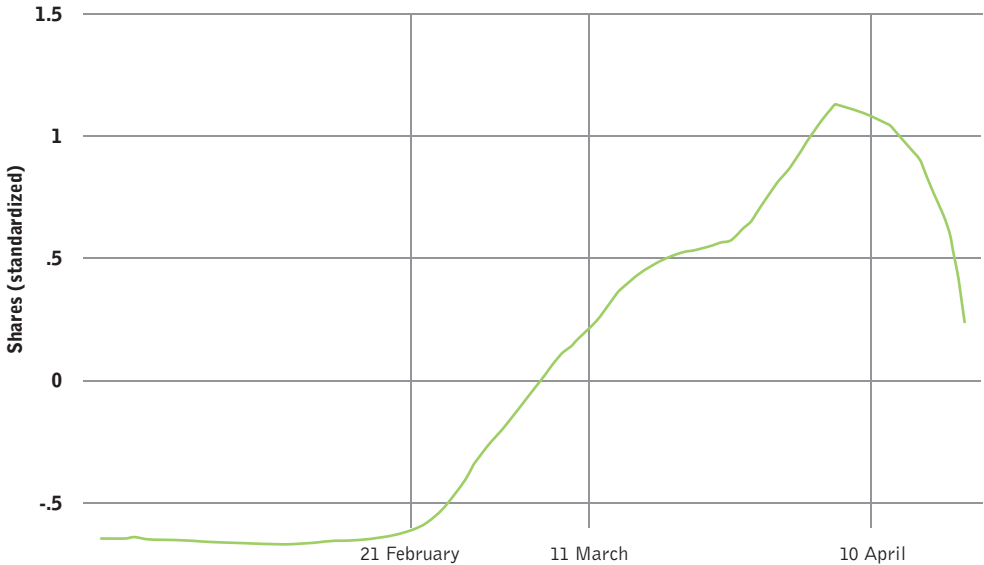
As table 2 shows, Conte’s fanbase increased by 172% during the pandemic. This means that it gained almost two million followers in four months. This incredible growth is unmatched among other Italian politicians and makes it difficult to compare the accounts. Despite the standardization of dependent variables, Conte’s page is anomalous, since during all pandemic phases, it improves its performance considerably, as shown in figure 8.

Figure 10. Conte's performance (likes and reactions, comments and shares)⁴⁰



⁴⁰ The scale of these graphs is different from previous ones.

Figure 11. Conte's performance (shares)



Conclusions

The purpose of this chapter was to shed light on the relationship between populism and social media in a peculiar period, characterized by COVID-19's drastic impact on Italian society. At first, populism was defined as a communicative style appealing to the people, attacking the elite and ostracizing others. Next, Facebook was studied as part of a complex hybrid media system built upon intricate interactions occurring between media, political, social and technological forces. The relationship between these two phenomena was then deepened and examined, with Italy as the chosen case study and the months-long COVID-19 outbreak as the temporal setting. The pandemic was analytically divided into two phases. During the first phase, stretching from the detection of the first outbreak to the beginning of the lockdown, the pandemic issue progressively gained social and political attention, although it was framed primarily as a social crisis and, therefore, remained depoliticized. Here, mainstream political leaders overperformed in terms of likes, comments and shares obtained on their Facebook posts, while, conversely, populists slightly underperformed. These trends confirmed the first research hypothesis and were mainly linked to the social rather than political nature of the crisis. Another element that may contribute to explaining these results could be a "rally around the flag" effect.⁴¹ Indeed, survey data shows that in this period, citizens tended to be supportive of their government, positively evaluating its

41 John E. Mueller, "Presidential Popularity from Truman to Johnson," *The American Political Science Review* 64, no. 1 (1970): 18–34. Accessed August 28, 2020.

policies and criticizing politicians who overly created obstacles for Conte and his interventions during this critical period.⁴²

The second phase started with the lockdown and ended when the ESM discussion reached its quantitative apex on 10 April. Here mainstream leaders underperformed while populists largely overperformed in terms of likes, comments and shares. During this phase, the pandemic's frame changed; it was labelled a political rather than social crisis. Here, every possible way of rallying around the flag vanished. Moreover, the differences measured by the three dependent variables before and after the pandemic are statistically significant only for populists. These results match the second research hypothesis.

Conte's Facebook account is anomalous since it gained almost two million fans during the pandemic. This gigantic growth fosters his performances, which constantly improve in the period examined. The main reason why Conte's fanbase increased to such a degree is that he regularly used his Facebook account to broadcast in advance of the most important policies. Rather than a reflection on the relationship between populism and crisis, Conte's account is a fruitful field to reflect on the relationship between institutional visibility and private ownership of the channels with which it unfolds. During the pandemic, Conte gathered a large audience, thus accumulating a large amount of social capital and power through the growth of his private profile on Facebook. These resources will remain Conte's property even after the termination of his institutional assignment.

42 "Ipsos Srl survey," published on September 3, 2020, available at: <http://www.sondaggipoliticoelettorali.it/ListaSondaggi.aspx>. 86% of the subjects interviewed approved the first policies adopted by the government to deal with the pandemic; 61% of the subjects interviewed criticize Salvini and Renzi, who are the politicians responsible for criticizing Conte the most in this period. Another survey ("Ipsos Srl Survey", published on December 3, 2020; available at: <http://www.sondaggipoliticoelettorali.it/ListaSondaggi.aspx>) reveals that at the beginning of the lockdown, Italians seemed to be totally supportive of their government as long as it followed scientific experts, who were trusted by 64% of interviewees.

The Cause and Retort of Populism: A Formal Political Reasoning (Politics) Without Distinct Ideology as a Response to a Political-Moral Crisis – Turning Laclau’s Theory into a Research Tool

ANDREJ ŠKOLKAY¹

Introduction

With rare exception, academic definitions or descriptions of populism are seldom clearly false or totally inaccurate. At the same time, there is scarcely a definition useful enough to theoretically explain the universal cause(s) of populism. Moreover, many studies on populism do not present a clear definition of the term. And furthermore, and relatedly, explanations as to the roots of populism, if they are present, markedly differ and often seem rather country-specific, speculative or missing entirely in many of these studies.

In this contribution we go beyond the current lack of academic consensus about the roots of populism and, in a sense, go back to the older theoretical explanation of populism’s universal origins. This, in turn, allows us to understand and suggest a proper method of how to research the causes of populism, as well as to suggest a proper definition of it. Finally, this allows us to come not only to a general, proper theoretical and empirical research approach on how to study populism but, in effect, also to a blueprint of how to tackle the emergence of populism.

Thus, this chapter argues that research on populism is often marked by failed attempts to find some tangible criteria or common features that, ultimately, should somehow unify the roots of all types of populism. At best, this effort results in frustration among researchers in their attempts to identify such universal causes either on a theoretical or a practical level. Of course, some common external features of populism have been identified, such as demonstrating the central position of the people, being critical of the elite, perceiving the people as a homogeneous entity, and proclaiming a serious crisis.² In the view of Cas Mudde, the key distinction of populism is morality.³ This is, however, usually misunderstood normatively when populism is seen negatively. Instead, in our view, the morality of populism

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- 1 “This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 822590 (DEMOS). Any dissemination of the results presented hereby reflects only the consortium’s (or, if applicable, the author’s) view. The agency is not responsible for any use that may be made of the information it contains.” The author is thankful to Martin Mejstřík for his editorial intervention.
 - 2 Matthijs Rooduijn, “The Nucleus of Populism: In Search of the Lowest Common Denominator,” *Government and Opposition* 49, no. 4 (2014): 572–598.
 - 3 Hille Hanso, “Mudde: Populism Is Based on Morals,” *International Centre for Defence and Security*, May 23, 2018, <https://icds.ee/en/mudde-populism-is-based-on-morals/>.

should be used as a research tool. Andor⁴ seems to be right in pointing out that the key reason for the failure to understand populism might be that the generalizations of populism theory offer a binary analysis, while the sociopolitical reality is multidimensional. Moreover, it is often unacknowledged that there must be something missing in this or any other definition of populism – namely, a specific, clearly identifiable ideology. Otherwise, it would not be populism but something else (e.g., fascism or communism). However, those features of populism as identified by Rooduijn and others are more of descriptive nature and, as such, are further studied either at the rhetorical-discursive level, the ideational level and/or the political-strategic level. In fact, Rooduijn⁵ incorrectly separated the proclamation of a crisis from the core of populism and identified it as a consequence. Thus, even empirical comparative studies may bring inconsistent results. Yet the morality noted by Mudde and the proclamation of a crisis⁶, also defined by Rooduijn, actually fit together very well empirically as well as for the study of populism.

Be that as it may, there are in fact two overlapping groups of mainstream approaches to the research of populism: (a) a broad or thick ideology, a thin or narrowly understood ideology and a discourse or style and (b) the ideational approach, a political-strategic approach and a sociocultural approach. However, neither of these two broad groups of approaches offer a universally valid definition(s) for the roots of populism. Therefore, they are even less likely to be seen as trustworthy theoretical explanations of the proper method of analysis, and, ultimately, of its “cure”.

Yet, it is significant for our study that Rooduijn⁷, who has identified three key common features of populism, came to only two suitable definitions of it. The first is attributed to Mudde, although it originally reflects Laclau’s concept of “an ideology that considers society to be ultimately separated into two homogeneous and antagonistic groups”. The second definition is “a Manichean discourse”. In fact, even this definition can be seen as a reflection of Laclau’s original idea and not significantly different from the former. Importantly, Rooduijn (wrongly) noted that neither of these two definitions include all the elements of the lowest common denominator of populism. It is argued here that this is a fundamentally incorrect conclusion. That’s why we have presented only selections of both definitions that contain their definitional core and, at the same time, show inspiration from Laclau. It is acknowledged here that Laclau’s concept of populism is, paradoxically, the least often used concept of populism, although it can also be seen as a bridge to understanding populism as ideology.⁸ In contrast, the promotion of populism to being seen as ideology, the ideational approach, is currently the most popular thread of populism studies.

With the aim of contributing to defining the roots of populism, this study accepts Ernesto Laclau’s late and slightly refined definition of both the roots and external features of populism as a formal political logic without predetermined ideological content. This definition is, although not acknowledged as such, in Rooduijn’s conclusions of his cited comparative study. Thus, Laclau’s original definition will be revised and updated and then compared with the criteria used to assess the quality and applicability of concepts in the social sciences. It is argued here that this definition fulfils the key criteria used to assess that quality and applicability. Contrarywise, the current mainstream definitions of populism mostly do not comply with the key criteria for this assessment. Thus, they cannot be seen as a universal explanation(s) of the roots of populism.

4 László Andor, “Against a General Theory of Populism: The Case of East-Central Europe,” *Intereconomics* 5, no.1. (2020): 21–26.

5 Rooduijn, “The Nucleus,” 593.

6 See Yannis Stavrakakis, Giorgos Katsambekis, Alexandros Kioupiolis et al., “Populism, anti-populism and crisis,” *Contemporary Political Theory* 17 (2018): 4–27.

7 Rooduijn, “The Nucleus,” 592.

8 Michal Kubát, “Úvod do studia populismu,” in *Populismus v časech krize*, ed. Michal Kubát, Martin Mejstřík, and Jiří Kocián (Prague: Karolinum, 2016), 14.

However, the herein offered and, in fact, well-known definition of the roots of populism provides such a general theoretical explanation and implicitly suggests a traditional scientific method for its analysis. The major criticism of this type of definition has been its difficulty and impossible utilization for further empirical analysis of populism;⁹ yet, overcoming this methodological challenge is a surprisingly simple task. However, let us first focus on the fundamental problems with the concept of populism.

Defining the Concept of Populism

According to Freidenberg¹⁰, there are certain problems in defining the concept of populism. First, is *conceptual ambiguity*: The utilized term "populism" often does not define the exact meaning and the primary domain of the concept (politics, economics, psychology, etc.) and usually is not clearly limited in scope. In other words, Freidenberg argues that we do not know whether the psychological nature (uncertainty or fear), the economy (crisis, inflation, unemployment, relative or absolute decline in the standard of living), a political issue (primary mistrust of either political regime and/or political elites) or other problems are the mainstays or main manifestations of populism in different definitions or studies.

It is, however, evident that the uncertainty may depend on personal socioeconomic situations or perceptions of them as well as the blame attributed – whether legitimately or not – to primarily local, but sometimes foreign politicians for this economic situation. For example, Hofrichter¹¹ argues that the key to understanding the growth of populism lies in the global growth of income inequality since the 1980s. More specifically, research by Anduiza and Rico¹² suggests that the main explanation for populist attitudes is not the vulnerability or economic hardship suffered by the people, but rather the perceptions that citizens have about the economic situation.¹³

Thus, what if the conceptual ambiguity of populism is the strength and a typical fundamental feature of populism? In other words, populism may be caused by many factors, often mutually interacting, and sometimes actually contradicting each other. Moreover, it can have many manifestations. Still, there is something in common, as we have already suggested when citing Laclau's definition.

According to the second critical point raised by Freidenberg, there is an *insufficient empirical definition of the concept*, namely its vagueness, with indefinite boundaries and reference points. In other words, populism means almost everything, and, as a result, the expression has no specific meaning. According to Freidenberg, populism is used within contexts of downstream definitions that are too slim and too specific. The definitions used are too general and difficult to use in empirical research. Each researcher has an initial intuitive idea with which he approaches this linguistic term, concludes Freidenberg.

For example, most contributions to conceptual approaches to populism, as employed in 158 articles on populism published in 14 selected political science journals between 1990–2015, actually do not fall among the four categories suggested by *The Oxford Handbook of Populism*: cultural, economic,

9 See José Luis Berlanga and Jorge Ledo, "The Liberal Roots of Populism: A Critique of Laclau," *CR: The New Centennial Review* 10, no. 2 (2010): 51–182 or Kubát, "Úvod."

10 In Radek Buben, Vladimíra Dvořáková, and Jan Němec, *Que el pueblo mande!: Levicové vlády, populismus a změny režimu v Latinské Americe* (Prague: Slon, 2012), 122.

11 Stefan Hofrichter, "The Economics of Populism," October 2017, <https://www.allianzgi.com/-/media/allianzgi/global-agi/documents/allianzgi-stefanhofrichter-the-economics-of-populism.pdf>.

12 Eva Anduiza and Guillem Rico, "Economic correlates of populist attitudes: An analysis of nine European countries," 2016, https://www.researchgate.net/publication/308962315_Economic_Correlates_of_Populist_Attitudes_An_Analysis_of_Nine_European_Countries_in_the_Wake_of_the_Great_Recession.

13 Iveta Pauhofová, Beáta Stehlíková, Peter Staněk, and Michal Páleník, *Súvislosti prírjmovej polarizácie na Slovensku III* (Bratislava: The Institute of Economy of Slovak Academy of Sciences, 2018).

ideological and strategic. Many authors simply did not present a definition of populism, or they developed a conceptualization that was very unclear argue Kaltwasser, Taggart, Espejo and Ostiguy.¹⁴ Moreover, instead of many definitions or definitions based on formal “external” features, one needs a definition that would be in line with concepts used in social sciences. We are going to discuss this issue in further detail later.

Thirdly, according to Freidenberg¹⁵, there are *biases* in researching populism. In general, Yakovlev¹⁶ demonstrated that the essence of the concepts of populism (following the “essentially contested concepts” theory introduced by W. B. Gallie in 1956) can be contested on the basis of the ideological stances taken by the contesting parties, as well as because of the choice of terms and methodologies embodied in the discussion over the correct uses of such concepts. For example, Aslanidis¹⁷ identified regional bias¹⁸, policy bias¹⁹ and normative bias²⁰ in the study of populism. Sometimes regional and normative biases converge. Carpenter²¹ offered a culture-based explanation for the emergence of populism. Specifically, in his view, two types of political culture and institutions emerged, or rather survived in post-communist countries – the “traditional” and the “civic”. Thus, legacies of political subjugation and backward socioeconomic conditions allegedly led to populism, whereas more welcomed civic political cultures and institutions arose as a result of greater political autonomy. Similarly, Kovács²² distinguished between pre-modern and post-modern populism. In his view, while the former is characterized by a reliance on past values and was present in post-communist countries, the latter was found in Western Europe to be more oriented towards the present, and its quintessential representative was Jörg Haider in Austria. However, there is a consensus and empirical evidence that populism can be present in highly economically and culturally developed countries such as the United Kingdom or the United States.

Normative biases can also be found as a major tool used for analysis of political party manifestos, although researchers rarely acknowledge these biases.²³ Andor²⁴ explains these biases as a result of the fact that liberals tend to dominate populism studies in both Europe and the US”.

14 Pierre Ostiguy, “Populism. A Socio-Cultural Approach,” in *The Oxford Handbook of Populism*, ed. Critstóbal Rovira Kaltwasser, Paul Taggart, Paulina, Ochoa Espejo, and Pierre Ostiguy (Oxford: Oxford University Press, 2017), 99–128.

15 In Buben et al., *Que el pueblo*, 122.

16 Maksym Yakovlevyev, “Essentially contested concepts as a tool in political studies: definition and criteria,” *Grani* 23, no. 3 (2020): 17–26.

17 Paris Aslanidis, “Avoiding Bias in the Study of Populism,” *Chinese Political Science Review* 2 (2017): 266–287.

18 When certain perspectives that only benefit region-specific manifestations of populism are erroneously promoted to defining properties of supposedly general applicability.

19 Where populism is reduced to an economic recipe that purportedly wreaks havoc on national economies.

20 This relates to partisan assessments of populism’s impact on democracy, with the aim to denigrate ideological adversaries or celebrate favourites.

21 Michael Carpenter, “Slovakia and the triumph of nationalist populism,” *Communist and Post-Communist Studies* 30, no. 2 (1997): 205–219.

22 János M. Kovács, “Uncertain Ghosts: Populists and Urbans in Postcommunist Hungary,” in *The Limits of Social Cohesion. Conflict and Mediation in Pluralist Societies*, ed. P. L. Berger (Boulder: Westview Press, 1998), 113–145.

23 Kostas Gemenis, “What to Do (and Not to Do) with the Comparative Manifestos Project Data,” *Political Studies* 61, no. 1 (2013): 3–23; Mattia Zulianello, “Analyzing party competition through the comparative manifesto data: some theoretical and methodological considerations,” *Quality & Quantity* 48 (2013): 1723–1737; Wojciech Woźniak, “Programy polskich partii politycznych jako materiał empiryczny w badaniach dyskursu politycznego,” *Środkowoeuropejskie Studia Polityczne* 2 (2017): 41–58; Pippa Norris, “Measuring Populism Worldwide,” Faculty Research Working Paper Series, HKS Working Paper No. RWP20-002 (2020), https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3541314.

24 Andor, “Against.”

Therefore, we must confront the already discussed key concepts of populism with scientific theories and methodologies used in conceptualizations. Before doing so, the best way to proceed further seems to be a discussion of the basic methodological approaches to comparative analysis. Comparative analysis in general is central to theory-building and theory-testing in policy studies,²⁵ and especially if it is based on analysis of socioeconomic phenomena in relation to their institutional and sociocultural settings.²⁶

Basic Methodological Approaches to Comparative Analysis

There are two basic methodological approaches to a comparative analysis of certain sociopolitical phenomena, including populism. The first is radial, while the other is classical – sometimes called the Sartori model. Weyland²⁷ expanded these two categories with a third category known as the cumulative approach. This latter approach or strategy is based on calculating together individual populist attributes. However, in that sense, it is redundant and is covered by the two aforementioned basic methodological approaches.

The classical approach assumes that the phenomena can be conceptualized based on defining features that must be fully present in each individual case. Weyland²⁸ explains this approach as *redefinition*. Przeworski and Teune²⁹ speak of a systematic-specific approach; in other words, it may be different elements in a different context that can be used as defining features of the same category. This approach is validated further by Wittgenstein based on the concept of family resemblance.³⁰ This phenomenon can also be observed in the social sciences. Collier and Mahon³¹ point out that in applying this approach, it is necessary to examine the analytical relationship between the attributes that make up the “family” binder to support its use in the given category. Collier and Mahon³² consider it always counterproductive to exclude parameters that cannot be applied to new cases. In essence, they are basically returning to Weber’s idea of an “ideal type”.

The radial approach assumes that all the definitive traits must be present in each individual case of the phenomenon. Weyland³³ calls this approach as based on *additions*. Collier and Mahon³⁴ indicate that it is possible that two members of the same category will not share what can be considered the definitive elements in the final measure. Unlike in the family resemblance pattern applied in the classical approach, in the case of radial categories the overall importance of

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- 25 B. Guy Peters, Guillaume Fontaine and Jose-Luis Mendez, “Substance and Methods in the Comparative Study of Policy Change,” *Journal of Comparative Policy Analysis: Research and Practice* 20, no. 2 (2018): 133–141.
- 26 Linda Hantrais, “Contextualization in cross-national comparative research,” *International Journal of Social Research Methodology* 2, no. 2 (1999): 93–108.
- 27 In Kubát, “Úvod,” 14.
- 28 Ibid.
- 29 Adam Przeworski and Henry Teune, *The Logic of Comparative Social Inquiry* (New York: Wiley, 1970).
- 30 This is a possible category of membership in some group, within which the members of this category do not share any common element, but we can still recognize members of the human genetic family by observing the elements which they share to a certain extent – unlike the non-members of this family who share only a small amount of these elements. The similarities are clear although there may not be one mere element that is visibly shared by all members of the family.
- 31 David Collier and James E. Mahon, “Conceptual ‘Stretching’ Revisited: Adapting Categories in Comparative Analysis,” *The American Political Science Review* 87, no. 4 (1993): 845–855.
- 32 Ibid.
- 33 In Kubát, “Úvod,” 14.
- 34 Collier and Mahon, “Conceptual.”

the category is anchored in the “central subcategory”, that is, in the best possible type or prototype of that category.

The applied or selected analytic-categorization approach is consequently relevant for the expansion of the given categories. In the application of the radial approach, expanding the secondary characteristics of a category may, paradoxically, outweigh the significance of the primary characteristic. As Collier and Mahon³⁵ note, it is an inverse relationship. Populism, as a primary category, should then be defined using a reverse mechanism in such a way as to include all the necessary and sufficient features so that it could not be disputed that it is always primarily about populism. This issue can be illustrated using the erroneous inclusion of radical right-wing parties that are using populist rhetoric among populist parties. Within this context, Rydgren³⁶ argues that the radial approach is typical for defining populism as a broad or thick ideology.

If we consider the concept of democracy or popular sovereignty to be closely related to the concept of populism, then it is the right direction of research, since Collier and Mahon³⁷ also consider democracy to be a radial category.

This approach would justify our understanding of dichotomous populist rhetoric based on a loose individualized or country, period-specific ideology (as broadly defined and conceptually narrow at the same time) of the nucleus performative *expression* of populism that has this key element in common. In addition, the classical approach will allow us to earmark dichotomous populist rhetoric based on a more specific ideology as rhetoric involving the manifestations of populism among primarily non-populist subjects, such as nationalists, communists or fascists, or radical right parties.

In other words, while the full-fledged expression of the populist subject is defined by the former sentence, the primarily non-populist subject is defined by the second sentence.

In practice, however, we see rather intuitive or mechanical attempts to categorize populist expressions – either the radial or the classical approach – most often in terms of searching for common features of populism on a performative level. As a result, many analysts remain puzzled regarding the many manifestations of populism, or they have a strict definition and categorization –methodological approaches that, on the other hand, exclude a large part of populist expressions.

Typical and Atypical Categories of and Approaches to Populism

We can illustrate the issue of confusing and misleading approaches to defining the core elements of populism through many examples that by and large reflect the performative³⁸ and binary normative aspects of populism. There are some bizarre definitions. Müller³⁹ divided the types of populism into “the good, the bad, and the ugly” according to the intensity of its expressions. “Good” populism translates complicated issues into a simplified form for a wider audience. “Bad” populism leads to negative political outcomes as a result of ignoring related or auxiliary costs. “Ugly” populism is characterized by all the negative features mentioned above and, moreover, seems to be defined by the search for enemies. Finally, in Müller’s view, milder forms of populism may get worse over time.

35 Collier and Mahon, “Conceptual,” 850.

36 Jens Rydgren, “Radical right-wing parties in Europe: What’s populism got to do with it?” *Journal of Language and Politics* 16, no. 4 (June 2017): 1–12.

37 Collier and Mahon, “Conceptual,” 849.

38 Defined as “being or relating to an expression that serves to effect a transaction or that constitutes the performance of the specified act by virtue of its utterance,” <https://www.merriam-webster.com/dictionary/performative>.

39 Henrik Müller, “Populism, de-globalization, and media competition: The spiral of noise,” *Central European Journal of Communication* 10, no. 1 (2017): 64–78.

It is clear that even though Müller introduced the definition of populism – composed of the three elements cited by Mudde in 2004 and of two communication elements – such a confusing and perhaps too artistic categorization does not help us to understand the phenomenon of populism.

Rydgren⁴⁰ surmised that social scientists in the recent past have applied three different approaches to determining the basic categories of populism. Indeed, these are currently the three mainstream analytical approaches: the inclusion of populism within what is known as *broad or thick* ideology, the perception of populism as a *thin or narrowly understood* ideology, and the perception of populism as a *discourse or style*. Significantly, Rydgren noted that these three different approaches are not mutually exclusive. Mudde⁴¹, as mentioned, merged both thick and thin ideology within the ideational approach, which is about ideas in general and ideas about “the people” and “the elite” in particular. Moreover, Mudde argues that the ideational approach to populism is the most broadly used in the field of populism today.

The third category (discourse or style) can be, perhaps surprisingly, found in *The Oxford Handbook of Populism* as split into two further subcategories.⁴² The first subcategory is a political-strategic approach aptly summarized by Weyland⁴³ and defined as “the methods and instruments of winning and exercising power”. Then there is a sociocultural approach summarized by Ostiguy⁴⁴, who introduced a key dimension of differentiation in populist political appeals that he calls the “high” and the “low”.

We are not going to discuss the pros and cons of these alternative approaches or categories as it will be shown that they are less important for our further analysis.

Rydgren’s categorization – perhaps inaccurately or differently interpreted – is also found in Havlík and Pinková⁴⁵, who presented three basic groups of populism definitions. First, there are definitions of populism as a full-fledged ideology, but, according to Havlík and Pinková, these refer to populism’s manifestations in the nineteenth century. However, it begs for specification that the understanding of populism as an ideology is also found in recent works. In a significant shift compared to his previous work, Učeň⁴⁶ defined populism as a specific perspective on the nature of politics – as a special ideology. Perhaps more accurately, the definition goes beyond the second category in which Pavlík and Pinková indicate populism as a not fully-fledged or not completely fulfilled ideology in terms of content (*thin-centred*). According to these authors, this explanation is characterized by focusing on certain specific aspects of social life, particularly on the structure of political power and the form of the political process.

In the third analytical approach, according to Havlík and Pinková, populism is seen as a political practice or a form of political communication. Researchers who belong to the last group, for instance, Buben, Němec and Dvořáková⁴⁷, defined populism as a characteristic feature of democracy, and the difference among various populism types then lies only in the intensity, the use of populism and the

40 Rydgren, “Radical.”

41 Cas Mudde, “Populism. An Ideational Approach,” in *The Oxford Handbook of Populism*, ed. Cristóbal Rovira Kaltwasser, Paul Taggart, Paulina, Ochoa Espejo, and Pierre Ostiguy (Oxford: Oxford University Press, 2017), 44–67.

42 Cristóbal Rovira Kaltwasser Paul Taggart, Paulina, Ochoa Espejo, and Pierre Ostiguy, eds., *The Oxford Handbook of Populism* (Oxford: Oxford University Press, 2017).

43 Kurt Weyland, “Populism. A Political-Strategic Approach,” in *The Oxford Handbook of Populism*, ed. Cristóbal Rovira Kaltwasser, Paul Taggart, Paulina, Ochoa Espejo, and Pierre Ostiguy (Oxford: Oxford University Press, 2017), 48–72.

44 Ostiguy, “Populism.”

45 Vlastimil Havlík, Aneta Pinková et al., *Populist Political Parties in East-Central Europe* (Brno: Muni Press, 2012), 19–20.

46 Peter Učeň, “Populist Appeals in Slovak Politics before 2006 elections,” in *Democracy and Populism in Central Europe: The Visegrad Elections and Their Aftermath*, ed. Martin Bútora, Olga Gyárfášová, Grigorij Mesežnikov, and Thomas W. Skladony (Bratislava: IVO, 2007), 171–187.

47 Buben et al., *Que el pueblo*, 122.

goals of populist expressions. The aim of Buben, Němec and Dvořáková's research is then to explore populism as a basic political and power strategy combined with an authentic reliance on the concept of the people.

Buben, Němec and Dvořáková⁴⁸ also specify that they return to the long-dominating structure of definitions and thus see possibilities for populism's analysis in three traditional analytical categories: as a concept (essentially "good" people against "evil" elites), a political style (linguistic shortcuts and simplicity) or political strategy (the method and instrument of gaining and exercising power used during elections).

The problem with the above division is that, as the authors⁴⁹ themselves acknowledge, "the political strategy includes both style and idea"⁵⁰. But, if that is the case, then there are only two fundamental manifestations of populism: the idea and political style expressed in the concept of populism, which should be used without normative-performative ballast (without terms such as "good" or "bad"). This normatively uncontaminated concept of populism is what Laclau calls the constrained logic of expressing populist demands. Baiocchi⁵¹ calls these demands "unvoiced needs". It can also be called the political substance of populism.

The Political Substance of Populism

Clearly, the political substance of populism is better understood when we first discuss not the performative-normative but, primarily, the political-moral aspects of populism. In this effort, a two-tier categorization of the core of populism, as proposed by Petkovski and Nikolovski⁵², is helpful. According to them, there are two contradictory approaches to populism studies: a dominant theory that sees populism as *democratic illiberalism*, and Laclau's *theory of hegemony*, which sees populism as a formal political logic without predetermined ideological content.

There are two important and related issues that we must discuss now. First, is populism always anti-liberal? And second, is there populism without a liberal normative-political framework?

On the first question, Blondel⁵³, Davies⁵⁴ and Orwin⁵⁵ argue that liberalism and populism have far more in common than is commonly assumed. Practically, populism is usually anti-liberal, but not always and not necessarily in a narrow political-ideological meaning. The ideology of liberal democracy became so self-evident and omnipresent that it lost, in many cases, its distinctive meaning; in other words, populism can occasionally be based on liberal ideology, but usually it goes against some liberal-democratic rights, or perhaps more fundamentally, constitutional human rights.

48 Buben et al., *Que el pueblo*, 124 et seq.

49 Buben et al., *Que el pueblo*, 128.

50 Kubát argues in the same way (Kubát, "Úvod," 15) – a political strategy inevitably includes a political style.

51 Gianpaolo Baiocchi, *We, the Sovereign* (Cambridge: Polity Press, 2018).

52 Ljupcho Petkovski and Dimitar Nikolovski, "Populism and Progressive Social Movements in Macedonia: From Rhetorical Trap to Discursive Asset," *Politologický časopis – Czech Journal of Political Science* XXIII, no. 2 (2016): 164–181.

53 Michael J. Blondel, "Populism, liberalism, and democracy," *Philosophy & Social Criticism*, 44, no. 4 (2018): 353–359.

54 Will Davies, "The Neoliberal Spirit of Populism," Wissenschaftszentrum Berlin für Sozialforschung, February 8, 2018, <https://www.wzb.eu/en/node/>.

55 Clifford Orwin, "Why can't liberalism be populist, too?" *The Globe and Mail*, September 21, 2018, <https://www.theglobeandmail.com/opinion/article-why-cant-liberalism-be-populist-too/>.

Yet there are rare cases when populism is based on liberal ideology, at least in the form of instrumentalization⁵⁶. The analytical overview is complicated or confusing since there are sometimes populists who apply neoliberal economic policies, or at least there is a *neoliberal-populist* discourse.⁵⁷ There was over a decade of these policies in South America from the early 1990s until late 2000s.⁵⁸ All in all though, populism usually is anti-liberal by default as one of its features – since it usually emerges in a liberal democracy.

This issue is related to the second question – whether there occurs populism outside of a liberal framework. For example, some argue fascists and Nazi regimes are populist in their very fundamentals. This argument is supported by detailed analyses of the Nazi ideology, which was, at its deepest roots, best described as “nihilist”. In other words, it was actually ideologically empty or negative at best.⁵⁹ Eatwell⁶⁰ suggests that although populism and fascism differ significantly in ideology, the latter has borrowed certain aspects of populist discourse and style. On the other hand, populism can degenerate into leader-oriented authoritarian and exclusionary (but also inclusionary) politics. Yet there are differences between these two that will be presented later on in a table.

The most illustrative case here is that of *narodniki* or *narodnichestvo* from nineteenth-century Russia. Interestingly, its earlier interpretation was that of a theory advocating for hegemony of the masses over educated elites and represented a grassroot, pragmatic theory of democratic action.⁶¹ Arbuét⁶² claims, in a rather simplified way, that “populism started as a program and a Russian problem”. Based on this example, one can argue that it is possible to have populism in an illiberal and even undemocratic society. Yet it should be emphasized that some argue that the Russian *narodniki* was not an example of populism in the sense of the definitions mentioned here because it did not gain the support of the masses, and it tried to educate them on the basis of rational arguments.

Nonetheless, it seems more correct to claim that populism is a formal political logic without pre-determined ideological content expressing some common political grievances and wishes. There is a crisis and a moral issue. In essence, there is a moral crisis of the political regime that is manifested as demanding “true” democracy but not necessarily arguing against liberalism.

Within this context, a theory of hegemony should be understood on an abstract political and not an ideological level (e.g., not as a leftist movement) that goes against any hegemony in a society. We will come back to this argument later.

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- 56 See Ben Margulies, “What Geert Wilders and the Antilles can tell us about tensions between populism and liberalism,” August 4, 2017, <https://blogs.lse.ac.uk/europpblog/2017/08/04/what-geert-wilders-and-the-antilles-can-tell-us-about-tensions-between-populism-and-liberalism/>; Davies, “The Neoliberal Spirit.”
- 57 Matt Guardino, “Neoliberal populism as hegemony: a historical-ideological analysis of US economic policy discourse,” *Critical Discourse Studies* 15, no. 5 (2018): 444–462.
- 58 Weyland, “Populism.”
- 59 Dan Stone, “The Energy of Nihilism: Understanding the Appeal of Nazism,” in *Responses to Nazism in Britain, 1933–1939* (London: Palgrave Macmillan, 2003), 17–44.
- 60 Roger Eatwell, “Populism and Fascism,” in *The Oxford Handbook of Populism*, ed. Critstóbal Rovira Kaltwasser, Paul Taggart, Paulina Ochoa Espejo, and Pierre Ostiguy (Oxford: Oxford University Press, 2017), 436–459.
- 61 Richard Pipes, “Narodnichestvo: A Semantic Inquiry,” *Slavic Review* 23, no. 3 (1964): 458.
- 62 Camila Arbuét, “El populismo, una invención Rusa,” *Prácticas de Oficio* 2, no. 8 (2017): 1–10.

The Core Substance of Populism

Mudde and Kaltwasser⁶³ wondered whether rhetorical mobilization is a basic characteristic of populism or an empirical consequence of populism. As we have already suggested, the answer to this question is unambiguous: It is the basic characteristic of populism but, analytically speaking, it is not its substance. As put by Morgan⁶⁴, "Populism is best understood as an intensification of routine political dynamics." In other words, rhetorical mobilization can be associated with a number of emerging ideologies or a demagogue. This is a similar issue as that discussed earlier by Rooduijn⁶⁵ regarding the proclamation of crisis. Both rhetorical mobilization and a proclamation of crisis can be present, but they do not represent the substance of populism if seen separately. Both indicators can be found in any revolutionary period in history, be that the French Revolution or the Russian Revolution. However, we usually do not see either the French Revolution or the Russian Revolution as purely populist movements.

In any case, we are trying to digest the core of populism at a very abstract, deep political-ideational (not ideological, since ideology is more clearly defined) level. The main theorist within this so-called discursive group has been Ernesto Laclau. Laclau saw populism as a specific type of political logic – it may be better to use the word "politics" instead of "political logic" – characterized by confrontation with the existing ideological hegemony and which is able to divide social phenomena into two imagined camps, the power bloc (elite) and the people, via the construction of discourse. The discursive context in this way sees populism as emerging gradually.

In the first stage, various unsolicited requirements are combined into one central nucleus (later represented by the populist(s)), but it is possible that the nucleus may be – at least initially – a specific type of media, such as the Breitbart News Network in the United States or specific discussion groups on Facebook, generating a central nucleus one way or another. For example, for Italy and Beppe Grillo, it was his blog⁶⁶ that, for some time, served as this central nucleus. According to Laclau, the common identity of the whole group is created by defining a common enemy. We would change the concept of the enemy into the concept of a (political) "representative" or "negatively seen political adversary". Finally, the emotional connection emerges through a leader representing the people.

The problem with Laclau's original definition, according to Mudde and Kaltwasser, is that either populism is considered to be something ubiquitous, or anything that is not populist cannot be political. In our opinion, which explicitly or implicitly also appears in the work of most specialists on this subject, populism indeed is politically ubiquitous in liberal democracies although it is not always politically dominant or significant in political discourse or directly present in the exercise of political power. As put by Drozdova⁶⁷:

Two attributive characteristics of democracy (the idea of freedom and the idea of equality) generate populism, and the fundamental impossibility of democracy (as an ideal form) ensures its success. Therefore, along with the emergence of democratic thinking there is necessarily a populist

63 Cas Mudde and Cristóbal Rovira Kaltwasser. *Populism in Europe and the Americas: Threat or Corrective for Democracy?* (Cambridge: Cambridge University Press, 2012), 9.

64 Marcus Morgan, "Cultural Sociology of Populism," *International Journal of Politics, Culture and Society* (2020).

65 Rooduijn, "The Nucleus."

66 See e.g. Lorenzo Mosca, "The Five Star Movement: Exception or Vanguard in Europe," *The International Spectator* 49, no. 1 (2014); Filippo Tronconi, *Beppe Grillo's Five Star Movement: Organisation, Communication and Ideology* (Farnham, Ashgate: Routledge, 2015); Martin Mejstřík, *The Five Star Movement: Grassroot Movement or an Institutionalized Party?* (Paper presented at the ECPR General Conference in Oslo September, 2017), <https://ecpr.eu/Filestore/PaperProposal/1122a087-0c19-4867-a260-df42f9628456.pdf>.

67 Tetiana Drozdova, "Популізм і демократія," *Traektoriâ Nauki = Path of Science* 5, no. 7 (2019): 1.

thinking, and the multitude of forms of embodiment of a democratic setting prompts proteism of populism.

To simplify, politics and policies can be populist, non-populist and mixed, that is, with an occasional greater or lesser admixture of populism. Again, we should remind ourselves that we are essentially talking here about conflict and moral issues. Thus, when or why do politics become (more) populist? Sušová-Salminen⁶⁸ pointed to the problem of the fact that European generally cosmopolitan-liberal politics is understood to be a conflict-free sphere rather ignoring certain problems. This may result, for example, in populist nationalism:

Unfortunately, at the cost of also believing that consensus means breaking of the political conflict per se. Its central eradication from politics leads to the “returning” of conflict from the edges to its centre in a radical form, because it leaves the interests and demands of those outside of it to be ignored, leaving the space for today’s increasingly prominent political entrepreneurs with fear, nervousness and uncertainty.

In other words, when broadly understood political-moral issues and controversial issues/policies become ignored or seem to be ignored or are not sufficiently/efficiently tackled, then there is a problem of populist backlash. As put by Popov⁶⁹:

In crisis and transformational periods the actualisation of authoritarian liberalism corresponds to the fundamental tension between market capitalism and representative democracy. . . . Authoritarian liberalism restricts traditional forms of representative democracy, contributing to the reanimation of populism and political radicalism. The authoritarian restriction of representative democracy can lead not only to the strengthening of market capitalism, but also to the revival of reactionary forms of ‘new nationalism’ and illiberalism.

In fact, these ideas with respect to democracy were summarized much earlier by Sartori⁷⁰ who argued that protest behaviour comes from disillusionment with the real conditions and functioning of democratic institutions.

We will later show that the adjusted definition of Laclau best describes the nature of the emergence and transformation of populist logic/politics and cannot therefore be rejected. Given that the “minimal definition” (including the smallest number of definition features) is particularly useful in cases of very controversial and diversely understood concepts, it is clear that Laclau’s strategy is particularly suitable for defining and analysing populism. Within this strategy, the minimum elements necessary and sufficient to identify the case as the corresponding concept must be defined⁷¹.

Further discussion will show that other definitions and concepts explaining populism are less adequate or less useful. Before that, however, a discussion about conceptual issues in social sciences seems to be of paramount importance.

68 Veronika Sušová-Salminen, “Evropa a sebeurčení. První lekce z katalánského referenda,” *!Argument*, October 2, 2017, <http://casopisargument.cz/2017/10/02/evropa-a-sebeurceni-prvni-lekce-z-katalanskeho-referenda/>.

69 Maxim Popov, “Authoritarian Liberalism in Contemporary Europe: methodological approaches and conceptual models,” *Politics in Central Europe* 15, no. 1 (2019): 443.

70 Giovanni Sartori, *Teoria demokracie* (Bratislava: Archa, 1993).

71 Buben et al., *Que el pueblo*, 170.

Criteria to Assess the Quality and Applicability of Concepts in Social Science

Here it is useful to quote Gerring⁷², who summarized several criteria used to assess the quality and applicability of concepts in the social sciences: knowledge, resonance, economy, coherence, differentiation, depth, theoretical usability and validity, and usability in the field research. The problem with these criteria is that they may theoretically mutually exclude each other. For example, a definition of “economy” is usually opposed to “depth”, while “knowledge” may be inconsistent with “validity” (i.e., the ability of the research tool to find out what was intended to be detected). It is clear however that Laclau’s concept of populism, or more precisely his theory of populism, unlike other definitions and explanations, fulfils most of these conditions. It is noteworthy that Laclau’s theory remains either ignored, only vaguely criticized or only mentioned in passing by contemporary analysts of populism.⁷³

Laclau’s definition and theory of populism is relatively familiar, economical, resonant, coherent, allows differentiation and, at the same time, is sufficiently deep. It is also theoretically usable, valid and, ultimately, useful in empirical research. Indeed, it is a mystery why it is so often ignored in the research of populism. Perhaps behind this rejection, there is the original Marxist orientation of Laclau, or, more likely, its combination of simplicity and universality. In the next section, we shall explore why there seems to be a problem with Laclau’s theory in empirical research. It is useful to summarize these objections as a problem with utilization of Laclau’s general and, apparently, overly broad theory in practical social science research. However, we will show that this issue may not be a problem after all. In general, if the long-standing problem of social science is ambiguity, confusion and contradiction in terms of categories and definitions,⁷⁴ studying populism is the best proof of this set of drawbacks. This methodical problem was first discussed in detail by Giovanni Sartori in 1970 when he began to discern and brood about the use of concepts in new cases or even on those known in a different context (*conceptual travelling*) and the problem which arises when an old concept does not address a new case (what is known as *conceptual stretching*). Laclau’s approach solved this dilemma, as will be discussed later.

From Research to Theory

Let us first check in further detail the historical overview of how approaches to studying populism have developed in academic literature before the current prevailing consensus. Then we shall see that we still need to move beyond the current methodological consensus in populism research.

De la Torre⁷⁵ and Laclau⁷⁶ were among the first to summarize several meanings concerning the use of the term populism as a basis for generalizing *approaches to studying populism*. De la Torre⁷⁷ focused

72 In Buben et al., *Que el pueblo*, 167.

73 Mudde, “Populism.”

74 Collier and Mahon, “Conceptual.”

75 Carlos De la Torre, “The Ambiguous Meanings of Latin American Populisms,” *Social Research* 59, no. 2 (1992): 385–414 and Carlos De la Torre, “Populist Redemption and the Unfinished Democratization of Latin America,” *Constellations* 5, no. 1 (1998): 85–95.

76 Ernesto Laclau, *Politics and Ideology in Marxist Theory. Capitalism – Fascism – Populism* (London, New York: Verso, 1979).

77 De la Torre, “The Ambiguous.”

primarily on the analysis of South American examples of populism. According to De la Torre⁷⁸, the term populism is used here to define the forms of sociopolitical mobilization in which the “retarded masses” are manipulated by demagogic and charismatic leaders (a *political strategy*). The second use of the term populism refers to the designation of multiple social movements with leadership from the middle and upper classes and with the base formed by the people, that is, workers and farmers (a *movement*). The third use of the term populism refers to the historical period in the region’s dependent development or the degree in the transition to modernity. The fourth term refers to redistributive, nationalist and inclusive state policies (a *specific economic policy*).

The fifth use of the term populism meant a type of political party with leaders from middle- and upper-level social backgrounds, a strong folk base, nationalist rhetoric, charismatic leadership and without clear ideology (a *movement*). The sixth type of use refers to a political discourse that divides the society into two antagonistic groups: rural versus oligarchy (a *rhetoric*). The seventh type of use of the term populism refers to the attempt by the elites of the South American countries to manage the modernization process led by foreigners by putting the state in the role of a central defender of national identity and promoting national integration through economic development (a *specific economic policy*).

In 1998, De la Torre narrowed down the abovementioned methodological-explanatory approaches and identified only *three main approaches* to the analysis of Latin American populism and stated the methodological approach he preferred. First, these methodological-explanatory approaches included Germani’s concept of populism as a transitional phase during the modernization of Latin America, when populist adherents were understood to be easily manipulated masses (*the transition deviation*).

The second concept understood adherents of populism as a result of the inter-class alliance of the popular sectors – the middle classes and the new elites – against oligarchic regimes. The resulting regimes were authoritarian because they did not respect liberal-democratic standards and their social policies were popular-democratic (a *movement*).

The third concept was theoretically based on Laclau’s analysis of populism and empirically on discourse analysis discussed later in the text (*rhetoric*).

De la Torre’s new concept is actually the adaptation of Roberts’s explanation which understands populism as a failure of representative institutions to function as a mediator between the state and the citizen (*an outcome of a certain type of situation*).⁷⁹ It may be clear that the first and the last explanations are, at their core, identical, and they refer to *internal causes of populism*, while the second and third concepts are referring to *external forms of this phenomenon*. We will come back to this observation later.

Stewart⁸⁰ saw the possibilities of analysing populism in three ways: either as a system of ideas, a few specific historical phenomena or as a product of a particular type or types of social situation(s). Stewart’s approach has a weak point in the fact that these explanations do not exclude one another, but, on the contrary, they overlap. The first explanation does not distinguish populism from a standard ideology. While it is true that even ideologies are not ultimately consistent, they still represent a coherent and stable set of views, which is not the case for the majority of populist leaders.

From more recent work, Kubát⁸¹ considers Weyland’s approach to be correct, that is, the understanding of populism in the sense of politics; it is seen as the acquisition and execution of political power. However, it is not clear in what context should his populist action be seen as a specific or extraordinary

78 De la Torre, “The Ambiguous,” 386.

79 In De la Torre, “Populist.”

80 Andrew Stewart, “The Social Roots,” in *Populism: Its Meanings and National Characteristics*, ed. Ghita Ionescu and Ernest Gellner (London: Macmillan 1969).

81 Kubát, “Úvod.”

phenomenon. For example, elections are a contest for the acquisition and execution of political power regardless of whether populism is present or absent.

We see that neither previous nor some relatively recent approaches are useful in furthering the theoretical development of research and understanding of populism.

Now we come back to Laclau⁸² who summarized his earlier approaches to the study of populism through four basic categories, three of which, according to Laclau, describe populism as both a movement and an ideology, while the fourth approach reduces populism exclusively to an ideological phenomenon.

Laclau's first analytical category regards populism as a typical feature of a specific social class that can vary in different countries and time periods (e.g., the Russian *narodniki* or the agrarian populism of the late nineteenth and early twentieth centuries). Laclau criticizes this approach based on the fact that these types of populism do not really have anything in common except that they are considered populist, which does not actually explain the causes of their origin (*a class approach*).

The second analytical approach Laclau called a type of *theoretical nihilism*. Analysts in this group consider populism to be an empty concept (as theoretical nihilism), which should therefore not be used at all. Instead, they suggest that research should focus on the direct analysis of movements that are considered populist, namely the analysis of their class structure.

According to Laclau, the class approach to populism (as well as the second, nihilist approach) to analysis does not offer adequate analytical solutions because the class of populist movements is very diverse and combines something that is difficult to define or even something that can only be "pure illusion or a mere delusion", and, despite that, this factor must be explicable.

The third approach does not regard populism as a movement but as an "empty" ideology characterized by hostility to the status quo, mistrust of traditional politicians, appeals to the people rather than to social classes or groups, anti-intellectuals and the like (*ideology*).

This approach is found, for example, in Učeň⁸³. According to Laclau, such an approach faces two problematic issues: The typical features of populism are presented in purely descriptive form and do not explain the role of the populist element in the emergence of a populist phenomenon.

The fourth approach presents populism as a deviation in the process of transition from a traditional society to an industrial society (*functionalist concept*). We have often encountered such an explanation of the causes of populism in the countries of South America and post-communist countries. However, according to Laclau, this concept is analytically the most consistent, yet it is rebutted by the historical experience of populism in industrialized European countries at the beginning of the twentieth century. We can also add that it is also to be found at the beginning of the twenty-first century, for example in the United States or the United Kingdom, see, for example, Kurtbağ.⁸⁴

Moreover, Laclau claims that "the experience with fascism is regarded as a *sui generis* form of populism".⁸⁵ Laclau further states that, despite the formal signs of modernization, a particular society as a whole may be more traditional than other societies in view of some of its features. Laclau asserts that the term "modern" society in this context loses analytical meaning. Laclau then characterizes populism as *a specific non-trivial contradiction expressed in a discourse that refers to the people, with the concept of people having no specific definition*.⁸⁶ Laclau introduces the relative continuity of

82 Laclau, *Politics*, 144 et seq.

83 Učeň, "Populist Appeals," 19.

84 Ömer Kurtbağ, "ABD'de Yükselen Popülist Dalga ve Trumpizm: Neoliberal Küreselleşme, Ekonomik Kriz, Siyasetin İşlevsizleşmesi ve Elitizme Karşı Bir Geri Tepki mi?" *Gazi Akademik Bakış* 13, no. 26 (2020): 135–164. However, Andor, "Against," claims that in the cases of the UK and the USA, there is essentially nationalism present, not populism.

85 Laclau, *Politics*, 153.

86 Laclau, *Politics*, 164–166.

folk traditions as an important explanatory element of populism, which, however, does not create the essence of populism. What transforms ideological discourse into populist discourse is its peculiar form of articulation of human-democratic interpellation.

Thus, Laclau's earlier definition of populism was as follows: "Populism is a presentation of human-democratic interpellations as a synthetically-antagonistic complex with regard to the dominant ideology". Simply put, "populism begins where the human-democratic elements are presented as an antagonistic option against the ideology of the dominant bloc". The word "antagonistic" holds high importance as it distinguishes populist discourse from discourse based on "differences".⁸⁷ Laclau ends his earlier analysis by claiming that "the emergence of populism is linked to the crisis of dominant political discourse, which is, at the same time, an element of the general social crisis".⁸⁸ It should be pointed out that Edelman⁸⁹ defines the crisis as the creation of the language used to describe it: "The emergence of the crisis is a political act, not a discovery of a fact or of a rare situation." In other words, *crisis may be real, fabricated or exaggerated*. This is an important suggestion which may help us further in explaining the flourishing of populist phenomena under relatively normal circumstances. Because of the importance of crisis in politics, especially in the news media, "crisis discourse" is an indispensable part of a policy and a particularly populist policy that itself arises from a deeper societal crisis or at least from a society that creates presumptions for populist discourse.

There is a reason for Laclau to be considered one of the most important sociologists of the twentieth century. Laclau could also draw knowledge directly from his life experience or from the experience of his native Argentina, which had been through one of the most traumatic periods of populism in history with consequences continuing to this day. Laclau later explained the logic of populist rhetoric and logic.⁹⁰ Laclau begins to draw his construction of populist logic using the term "demand".

Laclau distinguishes *the difference between demand and request*. If a request is not met, it adjusts to a demand. If there are many such demands, the legitimacy of state authority and the antagonistic relations between the elites and the excluded (or unsatisfied "applicants" – citizens) become more complicated. In the given situation, *a form of negative solidarity* can arise between different unfulfilled requirements, as all the requests are shared by the fact that they are rejected by the state authorities. Laclau considers this an equity chain that creates the preconditions for the emergence of populism. The equity chain has an essentially anti-institutional position. In addition to the primary institutions, the enemy may also be something else (e.g., the media), but, in any case, there will always be some enemy needed. Laclau then asks, who will represent all these unfulfilled demands? They should be transformed into a single request, which itself then ceases to be, but eventually becomes the embodiment of all other demands. This is known as the empty signifier. Populism then represents a political logic or action, a politics that consists of expanding the chain of equivalences and their representation by one element at a time. The representation can be almost anything, and as the number of partial problems/themes gradually grows, the representation of them all very often ends up being a charismatic leader.

According to Laclau, *populism is not everything that appears as populism* (i.e., not all the messages that have been said or promised during an election campaign), *but only what appears to be a constrained logic of expressing these contents*. In addition to this, political practice may not express the nature of social factors, but it can create them. The content of populism cannot therefore be found in any particular political or ideological content/context. It follows from this theoretical analysis that populism is not an ideology as we traditionally understand it – as a more or less logically coherent set of ideas and concepts about the proper functioning of society. It is neither a "thin" nor a "thick" ideology.

87 Laclau, *Politics*, 172–174.

88 Laclau, *Politics*, 175.

89 Murray Edelman, *Constructing the Political Spectacle* (Chicago: University of Chicago Press, 1988), 31.

90 Ernesto Laclau, *The Rhetorical Foundations of Society* (London: Verso, 2014), 180–191.

Nevertheless, it is possible to describe the core of populist argumentation in the Laclauian sense. This is described eloquently within the liberal-democratic context by Blokker⁹¹:

A particular set of populist arguments involves the absolute prioritization of the people, their (arbitrarily defined) political participation and their sovereign will, resistance to elitism and establishment, the demand for radical freedom and “direct democracy”, “defection” of the alienated people (where estrangement is considered the result of artificial constructions by legal-rational institutions) through the unification of the people with political power, coupled with dishonourable formal institutions and pluralistic representative democracy, as well as an organic and undivided vision of the “people”.

The discursive aspect of populist mobilization is also highlighted by Hermet⁹² – in a way that interprets social reality. Hermet also mentioned three other discourses: demagogic, fascist and communist. The table below, which is taken from Buben, Němec and Dvořáková’s book⁹³, clearly illustrates these discursive differences.

Table 1. Comparison of populist discourse with similar types of discourse

Criterion	Populist Discourse	Demagogic Discourse	Fascist Discourse	Communist Discourse
Relation to the People	Impersonation of the real people in populist discourse	The representative is a people’s benefactor	The leader controls the still imperfect people, who need to be changed	Turns to working people (working class)
Content of Discourse	Expresses closeness	Benefits are important, not the discourse	Hierarchizing, based on fascination	Indoctrination
Diagnosis	Reality described in condemning manner	The description of reality – real allegations are missing	Reality described in condemning manner but with reference to the people of the future	“Scientific” and abstract explanation of reality
The Nature of the Solution Offered	Simple, anti-political solution	Immediate benefits without argument	Demand for sacrifice and courage	A bright future – no immediate results
Relation to (Liberal) Democracy	The necessity of a fundamental reform	Unexpressed	Enemy	“A big fig leaf”

91 Paul Blokker, “Post-Communist Modernization, Transition Studies, and Diversity in Europe,” *European Journal of Social Theory* 8, no. 4 (2005): 503–525.

92 In Buben et al., *Que el pueblo*, 143.

93 Buben et al., *Que el pueblo*.

As put by Andor⁹⁴, a politician who seeks support by appealing to the desires and prejudices of ordinary people rather than by using rational arguments is a demagogue, although in journalistic or popular discourse, this is often confused with the word populist.

Let us now turn to Laclau's general concept of populism which is closely related to the abovementioned rhetoric. Buben, Němec and Dvořáková⁹⁵ and many others criticize Laclau for his final conception of populism. These authors argue that it is too broad a concept. As such, it seemingly does not offer any operational criteria for the further analysis of populism. Specifically, Kubát⁹⁶ denotes Laclau's concept of populism as being of little use and, additionally, labelled it as the least often used. However, as mentioned, Kubát also claims that it can serve as some sort of a "reflection bridge" for understanding populism as an ideology. Buben, Němec and Dvořáková⁹⁷ agree with the importance of Laclau's concept in defining the measure of populism, but they also take issue with the absence of criteria that would differentiate the scale of populism (minimum–maximum).

We can presume that if Laclau defines the causes of populism's emergence correctly and simultaneously correctly identifies the essence of its discourse, it does not have to imply that he is also obliged to offer practical criteria for the analysis of populism (that is to say its empirical analysis). This is another task which is, to a large extent, normative⁹⁸. In other words, the acceptable scale of populism depends on its *negative impact on society*,⁹⁹ the definition of a context (who are the people and who are the elites), the *historical and local context* (who and what influences the level and transformation of populism) and on the *subjective opinion of observers or voters* (in what state is the people's rule/democracy, how do the people assess fairness in a society).

Turning Laclau's Theory into a Research Tool

Coming back to the previous issue, a more attentive reader can find the possibility for the practical empirical analysis of populist phenomena in Laclau's theory of populism supported by Rooduijn's empirical comparative research.¹⁰⁰ We have two key points here: First, *it is a general crisis*.¹⁰¹ More specifically, within representative liberal democracy, populism is the answer to the crisis of representative liberal democracy.¹⁰² Researchers should focus on revealing *the nature and causes of an existing general crisis in society*¹⁰³, crisis which appears to have been dealt with inadequately or not efficiently enough or remains unresolved, crisis which does not appear to have been articulated in public discourse and in public policies in the right way and with sufficient attention paid to it. Through this theoretical

94 Andor, "Against."

95 Buben et al., *Que el pueblo*, 149.

96 Kubát, "Úvod," 14.

97 Buben et al., *Que el pueblo*.

98 See e.g. Morgan, "Cultural Sociology."

99 For example, populists in opposition do not have to cause much damage and can even help serve as a corrector in a democracy if there is a captured state. Or, as Klaus von Beyme put it in "Populism Typologies in the Age of Globalisation and Post-Democratisation," in *Right-wing Populism. Springer Briefs on Pioneers in Science and Practice* 40 (Cham: Springer, 2019): "Right-wing populism can act as a barrier to right-wing extremism."

100 Rooduijn, "The Nucleus."

101 See also Margaret Canovan, "Trust the People! Populism and the Two Faces of Democracy," *Political Studies* 47, no. 1 (1999): 2–16, Hanspeter Kriesi, "Revisiting the Populist Challenge," *Politologický časopis – Czech Journal of Political Science*, XXV, no. 1 (2018): 5–27.

102 Artem S. Abramyan, "About signs of populism," in: *Bulletin of Moscow Region State University* (e-journal, 2020): 3, www.evstnik-mgou.ru, Drozdova, "Populism," Baiocchi, *We, the Sovereign*.

103 See e.g. Blondel, "Populism."

analysis it becomes evident that studying charismatic leaders and populist elements is secondary to the analysis of populism. Nevertheless, *an in-depth analysis of populist discourse, including party or electoral manifestos*, is important. The importance of such an analysis is related to the previous point – it may help to reveal the nature and causes of the crisis in society.

As Cohen¹⁰⁴ puts it, “Anxieties about status honour and material precariousness in contexts of profound political, socioeconomic, and cultural transformation are key to understanding successful populist mobilization and electoral authoritarianism.”

Considering the abovementioned synthetic nature of populist discourse, a proper analysis must go *beyond* what appears to be the single most dominant discursive element. In other words, the roots of crises may be hidden in the most dominant current of the discourse. For example, as summarized by El Ghoneimi¹⁰⁵, who held talks on European issues with French citizens living in small French towns and villages: “Immigration and identity are real topics, but they mask other economic and social grievances that concrete policies can and must address.” It is far more important, in terms of understanding populist discourse to know and to understand exactly which themes a unifying populist discourse is trying to express. These topics may be ignored and/or suppressed in official public or media discourses. It is of lesser importance who is expressing them.

Thus, what is ultimately needed is a situational analysis, also known as situational logic. If Laclau speaks about political logic, situational analysis is how Karl Popper believes social sciences can generate falsifiable and, therefore, scientific hypotheses.¹⁰⁶ Situational analysis provides the means to specify and map all the important human and non-human elements of a situation, emphasizing relationships, social worlds and discursive positions. In situational analysis, the social world and collective commitments and actions of participants within that world are the units of such analysis. It is an approach to research that uses a grounded theorizing methodology to identify and describe social worlds and arenas of action and does so by representing complexity through mapmaking.¹⁰⁷

Proper situational analysis and mapmaking can help us see populism from a less normatively negative perspective. According to Schmitter,¹⁰⁸ the key question to ask is whether populism will eventually turn into an authoritarian movement or whether it will remain a democratic or, more precisely, a democratizing phenomenon, which, for example, may put forward previously ignored and/or even rather untouched topics. In other words, it is important whether populism can respond to sociopolitical challenges that traditional political parties do not appear to have considered as urgent problems. This was the case, for example, in Austria and even more so in Italy until the beginning of the early 1990s, both of which featured widespread popular disaffection and disenchantment with the established political parties, politicians and the political process in general.

Conclusion

It is argued here that populism is not democratic illiberalism but rather a formal political logic (politics), associated rhetoric and ensuing political action without a predetermined ideological content. Naturally, populism can take the form of democratic illiberalism (or illiberal democracy) if it emerges

104 Jean L. Cohen, “Populism and the Politics of Resentment,” *Jus Cogens* 1 (2019, n.p.): 5–39.

105 Schams El Ghoneimi, “The EU is under attack from the far right. Here’s how I learned to defend it,” *The Guardian*, February 6, 2019, <https://www.theguardian.com/commentisfree/2019/feb/06/eu-far-right-steve-bannon-citizen-debates>.

106 Kevin D. Hoover, “Situational Analysis,” The Center for the History of Political Economy Working Paper Series 2016–17 (2016), <https://ssrn.com/abstract=2736927>.

107 See Adele E. Clarke, *Situational Analysis: Grounded Theory After the Postmodern Turn* (Thousand Oaks: Sage, 2005).

108 Philippe C. Schmitter, “The Vices and Virtues of ‘Populisms,’” *Sociologica* 13, no. 1 (2019): 75–81, <https://sociologica.unibo.it/article/view/9391/9197>.

within liberal-democratic societies, and it may most likely end up as so if there are no checks and balances available. Obviously, it opposes the backbone of a political system that is seen as partly or fully dysfunctional. This conclusion was made possible using Laclau's general concept of populism. For Laclau, populism is a symptom of a deeper crisis that is expressed in the form of a constrained logic of expressing what we call specific populist rhetoric. The difference between demagoguery and populism should be maintained.

The universal content of populism cannot therefore be found in any particular political, ideological or geographical context. There are, however, some common features that seem to be universally associated with populism: a deep, fundamentally moral crisis as a prelude; an unrecognisable magnitude or urgency of the crisis as a condition; and manifested or performative features, such as old elites as enemies, mass mobilization, importance attached to the popular will or to the "people" in general, no identifiable ideology, evolutionary politics (if it is revolutionary or anti-system, then it is, e.g., communism or fascism) and, finally, a charismatic leader is usually identifiable. However, charisma is understood here as a contextual phenomenon; thus, without crisis, there would be no charismatic leader. A charismatic leader may be replaced by another central convergence point, e.g., an online news portal, a blog or a social network.

Moreover, to understand the roots of populism, research should utilize the situational analysis approach and thus focus on revealing the nature and causes of the existence of a general crisis in society that does not appear to be (in whole or in part) articulated in the public discourse and in public policies. Inferentially and paradoxically, studying charismatic leaders and other populist elements, however interesting and useful, is actually secondary to the analysis of the roots of populism.

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