Volume 6 ▪ Number 2 ▪ 2020

intersections

East European Journal of Society and Politics

Passionate Europe

Intersections.

EEJSP

H-1453
Budapest,
PO Box 25.

The current issue was supported by:

Centre for Social Sciences tk

PUBLISHED BY:
Centre for Social Sciences

Zsolt Boda
Director General

intersections.tk.mta.hu

Intersections. East European Journal of Society and Politics
is an Open Access, double blind peer-reviewed online journal.
When citing an article, please use the article's DOI identifier.

Table of Contents

Editorial

Passionate Europe. An Expressive Turn in European Parliamentary Election Campaign Communication and Media Discourses

Book Reviews

General Articles

GABRIELLA SZABÓ *

Emotional Communication and Participation in Politics

Intersections. EEJSP
6(2): 5–21.
DOI: 10.17356/ieejsp.v6i2.739
http://intersections.tk.mta.hu

* [szabo.gabriella@tk.mta.hu] (Institute for Political Science, Centre for Social Sciences

1. Objectives of the thematic issue

Ten years after the article by Berry Richards which highlighted the emotional deficit in political communication (Richards, 2010), affects seem to be the holy grail for scholars who are dealing with media, election campaigns, and public discourse studies. Scholarly interest in emotions and political talks has increased over the past decade, with particular attention to the strategic and institutional ways in which emotions in politics are used and disseminated (Crigler and Just, 2012; Hissu and Beck, 2018; Jutel, 2017; Moss et al., 2020; Wahl-Jorgensen, 2019). There is a wide academic consensus on the emotive component of politics, and few would question that feelings and sentiments have effects on political communication and participation. It is even argued that we are witnessing the emotional turn in researching political discourses where there is a strong focus on the role of emotions in producing, processing, and responding to political information (Hoggett and Thompson, 2012; Lukas et al., 2019a; 2019b; Verbalyte, 2018; Zhang and Clark, 2018). Such an emotional turn certainly illuminates many details otherwise obscure related to political communication and political participation, and it does so with the aid of data-driven and empirically informed analyses. The impact of emotions may be indirect, changing the societal context within which political interactions take place, or direct, affecting the content, the style and the modalities of communications and the forms of political engagement (Brader et al., 2011; Cho, 2013; Kühne and Schemer, 2015). The upsurge in the study of emotion in political messages is accompanied by the hope of further knowledge acquisition concerning the motivations behind political participation (see Barnes, 2012) and voting behaviours (see for example Brader, 2006; Hoon and Kwak, 2014; Weber, 2013).

Works concentrating on the discourse-emotion-participation nexus have in recent years been among the most promising developments in the field of social media, online politics, and audience research. Yet scholars have to deal with the problem: how can affects in politics be investigated through political discourse and political participation? On the individual level, our feelings are deeply subjective and so internal that we often cannot even express them. Emotions can rise and fall instinctually, but we must not forget about the cognitive and collective dimension such like language. On the collective level, the communication of emotion requires language which provides a common and shared vocabulary of expressing our emotional state of mind (see Koschut et al., 2017; Loseke, 2009; Loseke and Kusenbach, 2008; Tudor 2003). Having said that, we argue that there is a need to map out the socially and culturally shaped, verbal and non-verbal linguistic toolkit of the emotive political communication.

Our aim is to contribute to the literature by providing insights into the expressive aspects of emotions with microanalyses which focus on the everyday social interactions and single case studies that attempt to explore the multimodality in political communication. This is why we have put together this thematic issue of Intersections. East European Journal of Society and Politics (EEJSP) entitled 'Emotional Communication and Participation in Politics' to shed some light on the affective aspects of political communication and participation. There is a great deal of heterogeneity among the articles of the collection concerning the research design, methods, case selection, and country-focus. However, one mission unites them: making sense of the various ways how feelings work through political discourses and campaign communication with less normative, but still in-depth and nuanced knowledge on the emotions and political engagement. The Thematic Issue does not discard the rational paradigm. Quite the opposite: we are convinced that the elements of rational and emotive paradigms need to be merged to acquire knowledge about political communication and participation. The purpose of this editorial note is two-fold. First, it places emotions into political and election campaign communication research and summarizes the knowledge from previous studies. Second, it offers a short overview of the contribution of the Thematic Issue.

2. Lessons from previous studies: emotions in political communication

The vast majority of the literature focuses on the strategic use of emotion to mobilize public support (Brader et al., 2008; Castella et al., 2009; Kaid and Johnston, 2001; Peters et al., 2012). It is noted that politicians have always used emotional appeals strategically, as Aristotle recognized in his analysis of rhetoric. The so-called 'fear/anger appeal' is, for example, a well-established technique of political advertising (Huddy et al., 2007; Ridout and Searles, 2011), while the feeling of hope was the main message in first presidential campaign of Barack Obama (Yates, 2019). However, the relationship between internal subjective experience and external expression of emotions is problematic (Bericat, 2016; Brody, 1999; von Scheve, 2012). The emotional expression cannot be reduced to the mere manifestation of an internal state, as expression, oriented toward communication with another, emerges in the context of socio-political interaction (Marinetti et al., 2011: 32; Thoits, 1996). To put it simply, if a politician says that he/she is angry, it does not necessarily mean that it refers to one's mental state. In other words, external manifestations might have an emotion-expressive function, but also a socio-political communicative dimension (Marinetti et al., 2011: 32).

Despite the long history of emotional appeals in politics, one branch of the literature considers the affects as rather undesirable in a healthy democracy. Emotions are often described as a potential threat that can sway the 'unsophisticated masses to an undesirable end' (Miller, 2011: 525). Normative political decision-making models, for example deliberation, implicitly pit reason against emotion, painting emotion as a less valuable and unwelcomed element of political behaviour. From this perspective, emotion was denigrated as representing

a major obstacle which prevents citizens from fulfilling their civic duties (Marcus, 2002; Marcus et al., 2000; Erisen, 2018: 49).

2.1 Populism and emotive communication in politics

Populism studies represent an influential academic area of concern which discusses the detrimental consequences of the increasing visibility of the negative emotional expressions in politics (Wodak, 2015; Aalberg et al., 2017; Block and Negrine, 2017; Wirz, 2018). Negativity seems to be deeply rooted in populism's conflictual logic *'in which there are only friends and foes'* (Mudde, 2004: 544): emotions plays key role in increasing outgroup hostility which has been manifest in various discursive forms (e.g. anti-Semitism, anti-Romani sentiments, homophobic notions, xenophobia, see Gerő et al., 2017). Radical right-wing populist politicians are frequently criticized for using aggressive, offensive, and anxiety-fuelled rhetoric to gain media attention and electoral success. The style of populist politicians, it is argued, *'emphasizes agitation'* (Heinisch, 2003: 94), often by introducing *'a more negative, hardened tone to the debate'* (Immerzeel and Pickup 2015: 350) and *'intentionally provoking scandals'* (Schmuck et al., 2017: 88). Trump's campaign is depicted by *'unique vitriol of its rhetoric'* (Eiermann 2016: 34). While the left-wing populism in Spain and Italy is characterized by *'carnivalesque attacks'* (MacMillan, 2017) against the elite. Much academic reflection on populism and feelings has emerged from the perspective of *'emotive political sociology'* (Demertzis, 2006: 104) or *'sociology of emotions'* (Bericat, 2016), which seeks to find the human fundaments of populism. In doing so, a few attempts (e.g. Demertzis, 2006; Salmela and von Scheve, 2017; Capelos and Katsanidou, 2018) point at the role of complex emotions such as nostalgia, angst, helplessness, hatred, vindictiveness, anger, indignation, envy, resentment and resentment that are strongly connected to the electoral success of populist parties. Based on these observations, one might argue that individual sentiments could be a driving force for favouring populist messages and voting for populist parties. But there is more in this literature: it hints that nostalgic culture, the rise of victim mentality and anxious times may increase the volume of emotive reception of policy issues and populist actors may capitalize on that *'zeitgeist'* through the deliberate expression of anger (Nguyen, 2019; Taş, 2020; Wahl-Jorgensen, 2018).

2.2 Psycho-sociological foundations of emotive communication in politics

The display of emotion in politics is relevant beyond populism scholarship as well (Albertson and Gadarian, 2015; Verbalyte, 2018; Theocharis et al., 2020). While tremendous efforts have been devoted to the affect effects in political communication (see for examples Lipsitz, 2018; Marquart et al., 2019; Martin et al., 2017), less attention has been paid to the varieties of emotional expressions that are used in political communication. When studying emotions from the perspective of political communication and participation, researchers face several challenges.

On the theoretical level, scholars need to reflect on the political psychological accounts in the relationship between emotions and political actions. A fast-growing research interest in political affectivity orientates our attention onto the political psychology literature. Before exploring the affective dimension of political communication and engagement, it is important to clarify what we measure. Colloquial language routinely uses feelings and emotions interchangeably, but for academic purposed it is useful to separate them (von Scheve, 2018). Some reflections from the social science perspective have engaged in the task of conceptual clarification. It is argued that feelings are mostly bodily reactions that are activated through neurotransmitters and hormones released by the brain, while emotions are the conscious manifestation of sentiments (Crawford, 2014; Hutchinson and Bleiker, 2014). In this strict sense, feelings (e.g. bodily experience) are hard, if not impossible, to detect by focusing on the mental process such as communication and political participation. Emotions are however defined as socially and culturally constructed self-related, episodic, and categorical phenomena that involve cognitive and bodily processes. Four recurring features of emotion are prevalent in the literature: (1) cognitive appraisals; (2) physiological arousal; (3) the labeling of this response with cultural concepts; and (4) the culturally moderated expression of feeling associated with these responses (Wisecup et al., 2006). Looking at three influential classical theorists, Thoits (1989: 318) conceives of emotions as consisting of cognitive appraisals and changes in physiological or bodily sensations, Hochschild (1979: 551) defines emotion 'as bodily cooperation with an image, a thought, a memory – cooperation of which the individual is aware', and Kemper (1987: 263) suggests that emotions are 'autonomic-motoric-cognitive states'. TenHouten (2007: 3) provides an account of these differences, suggesting that emotions are reflections of a person's relationship with the environment regarding one's welfare and potential actions and behaviours to secure this welfare. He also proposes that emotions need to be understood at different levels, in particular, the 'biological and evolutionary', the 'mental and the psychological', and 'the social and the cultural' levels (TenHouten, 2007: 8).

Hochschild draws attention to the observation that our emotions must be aligned with the norms and expectations that are found in every social setting. Each setting, each definition of the situation, will require different kinds of emotional responses and thus feeling management. Hochschild calls these scripts for emotions feeling rules: 'Feeling rules are what guide emotion work by establishing the sense of entitlement or obligation that governs emotional exchanges' (Hochschild, 1983: 56). These feeling rules are social norms that tell us what to feel, when to feel, where to feel, how long to feel, and how strong our emotions can be. Some elements of the feeling rules have been explored through the lens of display norms. Emotional expression norms in a social group account for how individuals are expected to communicate their emotions (Moons et al., 2009; Leonard et al., 2011). Such rules train people to automatically modify elicited emotional reactions according to context-specific demand characteristics (Matsumoto and Juang, 2013). These rules, guided in part by cultural values related to inherent social structures and interpersonal relationships, are important for the

preservation of social order; the generation of culturally appropriate emotional responding; and the facilitation of social functioning (Matsumoto and Juang, 2013). Emotions therefore can be considered as a moral judgment about proper behavior (Eisenber, 2000) and it is claimed that our socialization orient our mentality of adequate emotional expressions in a given situation (Kitzmann, 2012). Social conventions, institutionally and intersubjectively, have a strong impact on the person's emotional status. These rules and regulations are important on the collective level also: they contribute to establishing and maintaining social ties among group members (Stets and Turner, 2008).

The conceptualization of emotions divides the political psychology into distinctive fractions (Redlawsk and Pierce, 2017). Erisen (2018: 51–54) observes three main theoretical traditions: appraisal theories, valence approach and neural process theories. For scholars of political behaviour and communication, all the three paradigms offer fruitful grounds to carry out empirical analysis. Appraisal theory is very useful in politics since it postulates that emotions evoke distinct behavioural outcomes: fear for example leads to two actions – fight or flight (Wagner and Morisi, 2019). People who fear might support politicans who are communicate care and instant solutions for the chaotic times and worrisome issues (Vasilopoulos et al., 2019). Furthermore, politicians might promote emotionally charged crisis narratives to manipulate the 'ontological insecurity' of the voters (Homolar and Scholtz, 2019). Conceptually, the valence theory distinguishes between negative and positive emotions which is originated from the basic human motivational systems of approach and avoidance. Those who feel positive about an event, issue, or political candidate are more likely to be attracted by the target and wish to approach it. And the other way around, those who feel negative wish to avoid it, aiming to protect themselves from potential negative outcomes. Thus, the division of negative and positive feelings (and their expressions) help is to determine someone's evaluation of political parties, topics and events (Lodge and Taber, 2005) It suggests that political behaviour can be explained by bipolar emotional judgements and such judgements can be measured by classifying expressions as positive or negative sentiment (Sniderman et al., 1991). Neural process theories are considered advanced versions the valence approach, since they highlight that negativity and positivity range from low to high according to the emotions felt (Marcus, 2013).

So far, most studies on the emotive aspects of the political messages dominantly deal with the aid of the discrete emotion analysis or valence-based approach (Crigler and Just, 2012, for review). Discrete emotion analyses dominantly focus on anger, anxiety and fear in political talks, we however have limited knowledge of the communicative characters of complex emotions such as outrage and disappointment. However, valence-based approaches assume that emotional expressions are either positive or negative and they measure the proportion of each category in different political contexts (Briesemeister et al., 2012; Himelboim et al., 2014; Soroka et al., 2015).

On the methodological level, the valence model offers a solid analytical background with high chances of replicability and comparability for political communication studies. More specifically, the positive-negative classification is

good at identifying direct expressions. One of the most established techniques is the so-called dictionary-based sentiment analysis which is a big data approach to measuring the feeling that a text conveys to the reader.[1] In the simplest case, sentiment has a binary classification: positive or negative, but it can be extended to multiple dimensions (Haselmayer and Jenny, 2017). Another approach for sentiment analysis is the supervised learning technique which is broadly used for emotion classification purposes (Petchler and González-Bailón, 2015). In this advanced method, model or learner is first trained with some sample data which have already been assigned to the categories, and then the model is tested by providing some sample data as input to the model for doing classification based on the prior training given to it. Automated sentiment analysis is a useful tool to investigate the general and particular public sentiment or attitude within a big dataset, although critics point out several weaknesses of the method (Settle, 2020). Computer programs for example have difficulties recognizing certain linguistic feautres like sarcasm and irony, negations, jokes, and exaggerations, just to mention the most problematic issue (D'Andrea et al, 2015).

2.3 Emotions in political discourses

Scholars are constantly looking for new interpretative and nuanced measurements of emotions in politics. To do so, one may rely on the works of Hutchison and Bleiker (2017) and Katriel (2015) which shed light on the discursive nature of emotions: they propagate that the emotions are, at least partly, constituted through the discourses that condition us to how to express of feelings. Methodologically speaking, they argue that interactions and discourses offer good material to investigate the politics of emotions to study the external manifestation of emotions.

Emotion display norms and practises are the best to be identified through language and other tools of communication within different contexts. Koschut (2017) proposes a comprehensive conceptual framework to explore emotions through discourse. Based on the linguistic features, he distinguishes three possible ways to interpret the emotional expressions in the communication flow. Tracing the *emotional terms* covers the activity to collect and analyse the direct references to an emotional state of mind. It requires a lexical and semantic collection of emotive nouns, verbs, and adjectives which is usually available for each language. Nowadays, emotive terms can be relatively easily collected and analyzed by various computational methods. Koschut however argues that we should move beyond the manifest emotional utterances since certain words are not in the dictionary of emotions, but still are loaded with emotion. Focusing on the *emotional connotations*, the examination can investigate the associated or secondary meaning of an expression which implies the emotional attitude of the speaker. The classic example is the freedom fighter versus terrorist word choice:

[1] Learn About Dictionary-Based Sentiment Analysis in Python With Data From the Economic News Article Tone Dataset (2016). Available at https://methods.sagepub.com/base/download/DatasetStudentGuide/dictionary-based-sentiment-analysis-in-econnews-2016-python Accessed on June 30, 2020.

the previous is associated with pride and sympathy, while the latter indicates the anger or fear of the communicator. However, it must be mentioned that in the real world discussions have many ambiguous connotations and sometimes it is rather challenging to differentiate between neutral and emotionally loaded tones. Thus, connotations vary across contexts, cultures, situations, but more interestingly, and yet to be scientifically discovered, they may change rapidly. As one can observe this in the discursive metamorphosis of the use of 'migrant' and 'refugee'. A decade ago, both were legal *termini technici* and neutral ways to describe the legal situation of individuals who left their home countries to live in another one. After the summer of 2015 when high numbers of people arrived in the EU mainly fleeing the war in Syria, but also from other countries in Africa and Asia, the connotation was modified: someone who uses the term 'migrant' is widely understood as evoking negativity and hostility towards the group of people who have recently come to the country, while the label of 'refugee' signalizes the positive, supportive and compassionate emotional status of the speaker (see Taylor, 2015). The neutral and objective use of the words 'migrant' and 'refugee' seems to be disappearing in the public discourse, but still, the researcher can never be sure about the emotional predisposition of the speaker. If we just think about the name choice of the Humanitarian Organizations called 'Migration Aid' which would be certainly misleading if one can code them as hostile emotional expression towards the asylum seekers.

Koschut (2017) also introduces the category of *emotional metaphors* which includes not only figurative speech, but comparisons and analogies as well. People often use metaphors to illustrate their emotional state (see also Kövecses, 2003): light is usually connected to hope, dark is often referred in connection with sadness, and heaven is the metaphor of inner peace and harmony while hell is used to depict a painful situation or suffering, etc. Comparisons and analogies are also quite telling from that point of view. If someone calls Viktor Orbán, the Prime Minister of Hungary, dictator, it is plausible to assume that the speaker has a negative feeling towards him. Although Koschut concentrates on the verbal emotive metaphors, comparisons, and analogies, it is not too difficult to integrate the visualizes (still images, moving pictures, artworks, symbols, even clothing, and hairstyle) and other modalities (pitch and loudness of sound, for example) in the conceptual framework. Hitler's toothbrush moustache, for example, is one of the most powerful symbols representing dictatorship and is often used in mocked-up defamatory, disapproval and caricature images of politicians (see Fam and Doer, 2015). Facebook users who create and share a caricature of a politician with toothbrush moustache presumably dislike that politician. Visualities are proven to be a carrier of emotive messages and they are quite an effective tool in consumption-related behaviour (Winkielman and Gogulushku, 2018), while the political relevance is yet to be discovered.

Last but not least, it is necessary to discuss the potentiality in researching emotive communication in politics. This approach may contribute to the general academic endeavour of studying emotions in three main ways at least. First, one of the main advantages of content or discourse analysis is that they are the nonobtrusive methods that allow us to collect data without creating artificial

situations unlike surveys, experiments, and structured interviews. This is especially valuable since it increases the chances to observe the real-life emotional practices in political speech. These findings are useful to our ontological and epistemological knowledge of emotions. Second, the examination of the expressivity in public discourse reveals a new level of the power struggle: a successful politician, who has embodied the emotional rules and expression norms of politics, strategically deploys emotions in the pursuit of power. Emotional competence becomes increasingly important in the habitus of professional politicians and emotion can be viewed as a form of power operating within the political field (see Heaney, 2019). From that perspective, one should pose the following research questions: what can be considered as an acceptable or an unacceptable way of expressing agreements and disagreements in politics?; what are the sanctions of any norm violations?; how are new practices institutionalized and internalized?; who sets the norms of political communication and behaviour?; etc. Third, it provides insights into the realm of collective emotions. As von Scheve and Salmela point out (2014), through interactions in social media and political rallies individuals were able to synchronize their thoughts and emotions, stimulating a sense of social belonging and shared beliefs.

Investigating emotive expressions brings us closer to understanding the means, mechanisms, functions and the instrumentalism of emotions, that is, emotionalization in politics. Also, it sheds some light on the political triggers of emotional responses (included violent actions) which becomes more and more relevant in the age of victimhood culture.

3. Overview of the contributions of the thematic issue

This Thematic Issue cannot cover the full spectrum of the discursive approach of emotions in politics, rather it represents a step in the long and bumpy road to discovering the affective dimension of political communication and participation. With this in mind, the present special issue collects contributions from the disciplines of media and political communication, sociology and anthropology to highlight the various circumstances that enable and stimulate the pursuit of emotional political speech in Europe. To understand the discursive pragmatics of emotions it is useful to distinguish between the strategic use of affective display and instinctive, spontaneous, unplanned affective communication (Janney and Arndt, 1992). The first and the second article of the Thematic Issue illustrates the way how political actors instrumentalize the emotions in their discourse, while the third article is a case study which investigates rural citizens' emotive language.

The first article explores a political advertising campaign in Cyprus. The study focuses on Niyazi Kızılyürek, who was a candidate for the 2019 European Parliament election with the left-wing Progressive Party of Working People (AKEL). Adopting a multi-method of visual and qualitative content analysis to fifty-five ads, the analysis uncovers the emotive character of the campaign language. It is found that Kızılyürek's political stance which favours a solution to the Cyprus problem based on federation with Greek Cypriots is reflected in each ad. Also, data suggest that issue-based ads that underline political issues in the

country were preferred to image-based ads that highlight the personal qualities of the candidate. When it comes to the affective dimension, the article demonstrates that both emotional appeals, associated with feelings such as hope and enthusiasm, and logical appeals, which tend to promote rational information processed by the conscious mind, were employed in the ads, and the overall tone of the ads was positive in nature, while negative emotions were completely avoided in this campaign.

The second article also offers a case study on emotional messages during the 2019 European Parliament (EP) election in Lithuania. To do so, the paper applies the 5W Lasswell model to assess campaign materials from the printed media and social networks. The findings confirm that the emotional messages dominated the communication of the political groups with their voters. It shows an extremely broad spectrum of the political messages arousing emotions: the politicians' messages to the voters overwhelmingly appealed to the European context to address the domestic agendas which exploited emotional aspects of domestic political discourses in Lithuania and the EU perception in the country.

The third article deals with the question of incivility and emotions by providing an ethnographic analysis of rural inhabitants' style when they are talking about politics. During interviews, especially these polyphonic, the author observed accompanying emotions such as raised voices, faces bloodshot with irritation, lively gestures, irony, and sometimes vulgar language and swearing. Anger, resentment, anxiety, fear, contempt, hostility, and even hatred were unmistakable signals of emotional involvement in political matters and engagement in the debate about the common good and public affairs. The study discusses the tension between incivility and political engagement by highlighting that impoliteness has a great mobilizing potential for populist parties in Poland.

In the fourth article, this section of the Thematic Issue zooms out from the emotional aspects of political communication and participation. This study investigates whether social media usage reinforces or weakens the willingness to become involved in a demonstration or other offline political activity. Numerous studies have already attempted to measure this effect, although with contradictory findings related to the direction and extent of the effect. This connection has been explored by synthesizing recent empirical political science papers. For this purpose, the article compares their results by using Bayesian Updating – a tool to compare studies regardless of their methodology or data collection method. This data analysis method is also insensitive to the operationalization of either the dependent or the explanatory variables. The results demonstrate that online political activity has a significant positive effect on offline political activity, based on the studies examined, even though some studies reported insignificant connections.

In the last section, this Thematic Issue provides three book reviews. First, we offer a critical overview of the collected edition entitled *Thirty years of political campaigning in Central and Eastern Europe* (edited by Otto Eibl and Miloš Gregor). Then, the content of the monograph *Emotions, Media and Politics* (by Karin Wahl-Jorgensen) is discussed from the perspective of Central and Eastern Europe. Finally, Emily Syndor's volume on political incivility (titled *Disrespectful*

Democracy: The Psychology of Political Incivility) is presented as one of the most influential contributions to the understanding of the role and effects of emotions in political engagement.

The Thematic Issue has been supported by the Hungarian National Research, Development and Innovation Office under the Grant Agreement no. 131990. The title of the research project is 'Political communication in the age of expressivity. What are the discursive mechanisms of expressive, emotional and uncivil political rhetoric in Hungary?'

References

Aalberg, T., Esser, F., Reinemann C., Strömbäck J. and de Vreese, C. H. (2017) *Populist Political Communication in Europe.* New York: Routledge

Albertson, B. and Gadarian, S. (2015) *Anxious Politics: Democratic Citizenship in a Threatening World.* New York: Cambridge University Press.

Bericat, E. (2016) The sociology of emotions: Four decades of progress. *Current Sociology,64*(3): 491–513. https://doi.org/10.1177/0011392115588355

Brody L. (1999) *Gender, Emotion, and the Family.* Cambridge, MA: Harvard University Press.

Block, E. and Negrine, R. (2017) The populist communication style: Toward a critical framework. *International Journal of Communication, 11:* 178–197.

Brader, T. (2006) *Campaigning for Hearts and Minds: How Emotional Appeals in Political Ads Work*. Chicago, IL: University of Chicago Press.

Brader, T., Marcus, G. E., and Miller, K. L. (2011) Emotion and public opinion. In Shapiro, R. Y. and Jacobs, L. R. (eds.) *Oxford Handbook of American Public Opinion and the Media.* Oxford: Oxford University Press. 384–401.

Brader, T., Valentino, N. A. and Suhay, E. (2008) What triggers public opposition to immigration? Anxiety, group cues, and immigration threat. *American Journal of Political Science, 52*(4): 959–978.

Briesemeister, B. B., Kuchinke, L. and Jacobs, A. M. (2012) Emotional valence: A bipolar continuum or two independent dimensions? *SAGE Open, 4*(2): 1–12. https://doi.org/10.1177/2158244012466558

Capelos, T. and Katsanidou, A. (2018). Reactionary politics: Explaining the psychological roots of anti preferences in European integration and immigration debates. *Political Psychology, 39*(6): 1271–1288. https://doi.org/10.1111/pops.12540

Castella, K. de, McGarty, C. and Musgrove, L. (2009) Fear appeals in political rhetoric about terrorism: Analysis of speeches by Australian Prime Minister Howard. *Political Psychology, 30*(1): 1–26. https://doi.org/10.1111/j.1467-9221.2008.00678.x

Cho, J. (2013) Campaign tone, political affect, and communicative engagement. *Journal of Communication, 63*(6): 1130–1152. https://doi.org/10.1111/jcom.12064

Crawford, N. C. (2014) Institutionalizing passion in world politics: Fear and empathy. *International Theory, 6*(3): 535–557. https://doi.org/10.1017/S1752971914000256

Crigler, A. and Just, M. (2012) Measuring affect, emotion and mood in political communication. In Semetko, H. A. and Scammell, M. (eds.) *The SAGE Handbook of Political Communication.* London: SAGE. 211–224. https://doi.org/10.4135/9781446201015.n18

D'Andrea, A., Ferri, F., Grifoni, P. and Guzzo, T. (2015) Approaches, tools and applications for sentiment analysis implementation. *International Journal of Computer Applications, 125*(3): 26–33. https://doi.org/10.5120/ijca2015905866

Demertzis N. (2006) Emotions and populism. In Clarke, S., Hoggett, P. and Thompson, S. (eds) *Emotion, Politics and Society.* London: Palgrave Macmillan. 103–122.

Eiermann, M. (2016) How Donald Trump fits into the history of American populism. *New Perspectives Quarterly, 33*(2): 29–34. https://doi.org/10.1111/npqu.12033

Eisenberg, N. (2000) Emotion, regulation, and moral development. *Annual Review of Psychology, 51*(1): 665–697.

Erisen, C. (2018) *Political Behavior and the Emotional Citizen: Participation and Reaction in Turkey.* London: Palgrave MacMillan.

Flam, H. and Doerr, N. (2015) Visuals and emotions in social movements. In Flamm, H. and Kleres, J. (eds.) *Methods of Exploring Emotions.* London: Routledge, 229–239.

Gerő, M., Płuczienniczak, P., Kluknavska, A., Navratil, J. and Kanellopoulos, K. (2017) Understanding the usage of enemy images in Central and Eastern European Politics. Towards an interdisciplinary approach. *Intersections. East European Journal of Politics and Society, 3*(3): 14–40. https://doi.org/10.17356/ieejsp.v3i3.365.

Haselmayer, M. and Jenny, M. (2017) Sentiment analysis of political communication: combining a dictionary approach with crowdcoding. *Quality and Quantity, 51*(6): 2623–2646. https://doi.org/10.1007/s11135-016-0412-4

Heaney, J. (2019) Emotion as power: capital and strategy in the field of politics. *Journal of Political Power, 12*(2): 224–244. https://doi.org/10.1080/2158379X.2019.1618485

Heinisch, R. (2003) Success in opposition – Failure in government: Explaining the performance of right-wing populist parties in public office. *West European Politics, 26*(3): 91–130.

Himelboim, I., Sweetser, K. D., Tinkham, S. F., Cameron, K., Danelo, M., and West, K. (2016) Valence-based homophily on Twitter: Network analysis of emotions and political talk in the 2012 presidential election. *New Media & Society, 18*(7): 1382–1400. https://doi.org/10.1177/1461444814555096

Hissu, H. and Beck, R. (2018) Emotions trump facts: The role of emotions in social media: A literature review. *Annual Hawaii International Conference on System Sciences.* https://doi.org/10.24251/HICSS.2018.226

Hochschild, A. (1983) *The Managed Heart: Commercialization of Human Feeling.* Berkeley, CA: University of California Press.

Hochschild, A. R. (1979) Emotion work, feeling rules, and social structure. *American Journal of Sociology, 85*(3): 551–575.

Hoggett, P. and Thompson, S. (2012) *Politics and the Emotions: The Affective Turn in Contemporary Political Studies.* New York: Continuum.

Homolar, A. and Scholz, R. (2019) The power of Trump-speak: populist crisis narratives and ontological security. *Cambridge Review of International Affairs, 32*(3): 344–364. https://doi.org/10.1080/09557571.2019.1575796

Hoon, L. and Kwak, N. (2014) The affect effect of political satire: Sarcastic humor, negative emotions, and political participation. *Mass Communication and Society, 17*(3): 307–328. https://doi.org/10.1080/15205436.2014.891133

Huddy, L., Feldman, S. and Cassese, E. (2007) On the distinct political effects of anxiety and anger. In Neuman, W. R., Marcus, G. E., Crigler, A. N. and Mackuen, M. (eds.) *The affect effect.* Chicago: University of Chicago Press. 203–230.

Hutchison, E and Bleiker, R. (2014) Theorizing emotions in world politics. *International Theory, 6*(3): 491–514. https://doi.org/10.1017/S1752971914000232

Hutchison, E. and Bleiker, R. (2017) Emotions, discourse and power in world politics. *International Studies Review, 19*(3): 20–28.

Immerzeel, T. and Pickup, M. (2015) Populist radical Right parties mobilizing 'the People'? The role of populist radical Right success in voter turnout. *Electoral Studies, 40*(4): 347–360. https://doi.org/10.1016/j.electstud.2015.10.007

Jutel, O. (2017) American populism, Glenn Beck and affective media production. *International Journal of Cultural Studies, 21*(4): 375–392. https://doi.org/10.1177/1367877916688273

Kaid, L. L. and Johnston, A. (2001) *Videostyle in Presidential Campaigns: Style and Content of Televised Political Advertising.* Westport, CN: Praeger.

Katriel, T. (2015) Exploring emotional discourse. In Flamm, H. and Kleres, J. (eds.) *Methods of Exploring Emotions.* London: Routledge. 57–66.

Kemper, T. D. (1987) How many emotions are there? Wedding the social and the autonomic components. *American Journal of Sociology, 93*(2): 263–289.

Kitzmann, K. M. (2012) Learning about emotion: Cultural and family contexts of emotion socialization. *Global Studies of Childhood*, *2*(2): 82–84. https://doi.org/10.2304/gsch.2012.2.2.82

Koschut, S. (2017) Introduction to discourse and emotions in international relations. *International Studies Review, 19*(3): 482–487.

Koschut, S., Hall, T. H., Wolf, R., Solomon, T., Hutchison, E. and Bleiker, R. (2017) Discourse and emotions in international relations. *International Studies Review, 19*(3): 481–508. https://doi.org/10.1093/isr/vix033

Kövecses, Z (2003) *Metaphor and Emotion: Language, Culture, and Body in Human Feeling*. Cambridge: Cambridge University Press.

Kühne, R. and Schemer, C. (2015) The emotional effects of news frames on information processing and opinion formation. *Communication Research*, *42*(3): 387–407. https://doi.org/10.1177/0093650213514599

Leonard, D., Moons, W., Mackie, D. and Smith, E. R. (2011) We're mad as hell and we're not going to take it anymore: Anger self-stereotyping and collective action. *Group Processes & Intergroup Relations, 14*(1): 99–111. https://doi.org/10.1177/1368430210373779

Lipsitz, K. (2018) Playing with emotions: The effect of moral appeals in elite rhetoric. *Political Behavior, 40:* 57–78. https://doi.org/10.1007/s11109-017-9394-8

Loseke, D. (2009) Examining emotion as discourse: Emotion codes and presidential speeches justifying war. *The Sociological Quarterly, 50*(3): 497–524. https://doi.org/10.1111/j.1533-8525.2009.01150.x

Loseke, D. and Kusenbach, M. (2008) The social construction of emotion. In Holstein, J. and Gubrium, J. (eds.) *Handbook of Constructionist Research.* New York: Guilford Press. 511–530.

Lodge, M. and Taber, C. (2005) The primacy of affect for political candidates, groups, and issues: An experimental test of the hot cognition hypothesis. *Political Psychology, 26*(3): 455–482. https://doi.org/10.1111/j.1467-9221.2005.00426.x

MacMillan, C. (2017) Welcome to the carnival? Podemos, populism and Bakhtin's carnivalesque. *Journal of Contemporary European Studies, 25*(2): 258–273. https://doi.org/10.1080/14782804.2016.1269642

Marcus, G.E. (2000) Emotions in politics. *Annual Review of Political Science, 3*(1): 221–250. https://doi.org/10.1146/annurev.polisci.3.1.221

Marcus, G. E. (2013) *Political Psychology: Neuroscience, Genetics, and Politics.* Oxford: Oxford University Press.

Marcus, G. E., Neuman, W. R. and MacKuen, M. (2000) *Affective intelligence and political judgment.* Chicago: University of Chicago Press.

Marquart, F., Brosius, A. and de Vreese, C. (2019) United feelings: The mediating role of emotions in social media campaigns for EU attitudes and behavioral intentions. *Journal of Political Marketing, 0*:1–27. https://doi.org/10.1080/15377857.2019.1618429

Marinetti, C., Moore, P., Lucas, P. and Parkinson, B. (2011) Emotions in social interactions: Unfolding emotional experience. In Petta, P. et al. (eds.) *Emotion-Oriented Systems, Cognitive Technologies.* Berlin: Springer. 31–46.

Martin, J. A., Myrick, J. G. and Walker, K. K. (2017) How young, uninsured Americans respond to news coverage of Obamacare: An experimental test of an affective mediation model. *Mass Communication & Society, 20*(5): 614–636. https://doi.org/10.1080/15205436.2017.1333621

Matsumoto, D. and Juang, L. (2013) *Culture and Psychology*, 5th ed. Belmont, CA: Cengage Learning.

Miller, P. R. (2011) The emotional citizen: Emotion as a function of political sophistication. *Political Psychology, 32*(4): 575–600. https://doi.org/10.1111/j.1467-9221.2011.00824.x

Moons, W., Leonard, D., Mackie, D., Smith, E. (2009) I feel our pain: Antecedents and consequences of emotional self-stereotyping. *Journal of Experimental Social Psychology, 45*(4): 760–769. https://doi.org/10.1016/j.jesp.2009.04.016

Moss, J., Robinson, E. and Watts, J. (2020) Brexit and the everyday politics of emotion: Methodological lessons from history. *Political Studies,* online first. https://doi.org/10.1177/0032321720911915

Mudde, C. (2004) The populist zeitgeist. *Government and Opposition, 39*(4): 541–563. https://doi.org/10.1111/j.1477-7053.2004.00135.x

Nguyen, C. G. (2019) Emotions and populist support. *SocArXiv,* 13 March. https://doi.org/10.31235/osf.io/e2wm6

Otto, L. P., Lecheler, S. K. and Schuck, A. R. T. (2019) Is context the key? The (non-) differential effects of mediated incivility in three European countries. *Political Communication, 37*(1): 88–107. https://doi.org/10.1080/10584609.2019.1663324

Otto, L. P., Thomas, F., Maier, M. and Ottenstein, C. (2019) Only one moment in time? Investigating the dynamic relationship of emotions and attention towards political information with mobile experience sampling. *Communication Research, 47*(8): 1131–1154. https://doi.org/10.1177/0093650219872392

Peters, G., Woolley, J. and Nelson, M. (2012) *The Presidency A to Z.* Washington, DC: CQ Press.

Petchler, R. and González-Bailón, S. (2015) Automated content analysis of online political communication. In Coleman, S. and Freelon, D. (eds) *Handbook of Digital Politics*. London: Edward Elgar. 433–450.

Richards, B. (2004) The Emotional Deficit in Political Communication. *Political Communication, 21*(3): 339–352. https://doi.org/10.1080/10584600490481451

Ridout, T. N. and Searles, K. (2011) It's my campaign I'll cry if I want to: How and when campaigns use emotional appeals. *Political Psychology, 32*(3): 439–458. https://doi.org/10.1111/j.1467-9221.2010.00819.x

Salmela, M. and von Scheve, C. (2017) Emotional roots of right-wing political populism. *Social Science Information*, *56*(4): 567–595. https://doi.org/10.1177/0539018417734419

Schmuck, D., Matthes, J. and Boomgaarden, H. (2017) Austria: Candidate-centered and anti-immigrant right-wing populism. In Aalberg, T., Esser, F., Reinemann, C., Stromback, J. and de Vreese, C. H. (eds) *Populist Political Communication in Europe*. New York, NY: Routledge. 85–98.

Settle, J. (2020) Moving beyond sentiment analysis: Social media and emotions in political communication. In Foucault Welles, B. and González-Bailón, S. (eds.) *The Oxford Handbook of Networked Communication*. Oxford: Oxford University Press. https://doi.org/10.1093/oxfordhb/9780190460518.013.20

Sniderman, P., Tetlock, P. A. and Brody, R. E. (1991) *Reasoning and Choice: Explorations in Political Psychology*. New York: Cambridge University Press.

Soroka, S., Young, L. and Balmas, M. (2015) Bad news or mad news? Sentiment scoring of negativity, fear, and anger in news content. *Annals of the American Academy of Political and Social Science, 659*(1): 108–121. https://doi.org/10.1177/0002716215569217

Stets, J. and Turner, J. (2008) *The sociology of emotions*. In Lewis, M., Haviland-Jones, J. M. and Barrett, F. (eds.) *Handbook of Emotions*. New York: The Guilford Press. 32–46.

Taş, H. (2020) The chronopolitics of national populism. *Identities*, online first. https://doi.org/10.1080/1070289X.2020.1735160

Taylor, C. (2015) Migrant or refugee? Why it matters which word you choose. *The Conversation,* 14 September. Available at https://theconversation.com/migrant-or-refugee-why-it-matters-which-word-you-choose-47227 Accessed 10-08-2020.

Ten Houten, W. (2007) *A General Theory of Emotions and Social Life.* New York: Routledge.

Theocharis, Y., Barberá, P., Fazekas, Z., and Popa, S. A. (2020) The dynamics of political incivility on twitter. *SAGE Open, 10*(2). https://doi.org/10.1177/2158244020919447

Thoits, P. A. (1989) The sociology of emotions. *Annual Review of Sociology, 15:* 317–342.

Thoits P. A. (1996) Managing the emotions of others. *Symbolic Interactions, 19*(2): 85–109.

Tudor, A. (2003) A (macro) sociology of fear? *The Sociological Review, 51*(2): 238–256.

Vasilopoulos, P., Marcus, G. E., Valentino, N. A. and Foucault, M. (2019) Fear, anger, and voting for the Far Right: Evidence from the November 13, 2015 Paris terror attacks. *Political Psychology, 40*(4): 679–704. https://doi.org/10.1111/pops.12513

Verbalyte, M. (2018) Deconstruction of the emotional logic of political scandal. In Haller, A., Henrik, M. and Kraus, M. (eds.) *Scandology: An Interdisciplinary Field.* Köln: Herbert von Halem. 62–87.

Von Scheve, C. (2012) The social calibration of emotion expression: An affective basis of microsocial order. *Sociological Theory, 30*(1): 1–14. https://doi.org/10.1177/0735275112437163

Von Scheve, C. and Salmela, M. (eds.) (2014) *Collective Emotions: Perspectives from Psychology, Philosophy, and Sociology.* Oxford: Oxford University Press.

Von Scheve, C. (2018) A social relational account of affect. *European Journal of Social Theory*, *21*(1): 39–59. https://doi.org/10.1177/1368431017690007

Weber, C. (2013) Emotions, campaigns, and political participation. *Political Research Quarterly, 66*(2): 414–428. https://doi.org/10.1177/1065912912449697

Wagner, M. and Morisi, D. (2019) Anxiety, fear and political decision-making. In Thompson, W. R. and Dalton, R. (eds.) *Oxford Research Encyclopedia of Politics.* https://doi.org/10.1093/acrefore/9780190228637.013.915

Wahl-Jorgensen, K. (2018) Media coverage of shifting emotional regimes: Donald Trump's angry populism. *Media, Culture & Society, 40*(5): 766–778. https://doi.org/10.1177/0163443718772190

Wahl-Jorgensen, K. (2019) Questioning the ideal of the public sphere: The emotional turn. *Social Media + Society, 5*(3): https://doi.org/10.1177/2056305119852175

Winkielman, P. and Gogolushko, Y. (2018). Influence of suboptimally and optimally presented affective pictures and words on consumption-related behavior. *Frontiers in Psychology, 8:* Article 2261. https://doi.org/10.3389/fpsyg.2017.02261

Wirz, D. (2018) Persuasion through emotion? An experimental test of the emotion-eliciting nature of populist communication. *International Journal of Communication, 12:* 1114–1138.

Wisecup, A., Robinson, D. and Smith-Lovin, L. (2007) The sociology of emotions. In Bryant, C. D. and Peck, D. L. (eds.) *21st Century Sociology*, vol. 2. Thousand Oaks, CA: SAGE. 106–115. https://doi.org/10.4135/9781412939645.n70

Wodak, R. (2015) *The Politics of Fear: What Right-Wing Populist Discourses Mean.* London: SAGE.

Yates, H. (2019) *The Politics of Spectacle and Emotion in the 2016 Presidential Campaign.* London: Palgrave MacMillan.

Zhang, L. and Clark, C. (2018) *Affect, Emotion, and Rhetorical Persuasion in Mass Communication.* London: Routledge.

NILÜFER TÜRKSOY *

Appealing to Hearts and Minds: The Case of a Political Advertising Campaign in the 2019 European Parliament Elections in Cyprus

Intersections.EEJSP
6(2): 22–39.
DOI: 10.17356/ieejsp.v6i2.645
http://intersections.tk.mta.hu

* [nilufer.turksoy@emu.edu.tr] (Eastern Mediterranean University, Famagusta – Cyprus)

Abstract

This research explores the political advertising campaign of Niyazi Kızılyürek, who was a candidate for the 2019 European Parliament election with the left-wing Progressive Party of Working People (AKEL) in Cyprus. It aims to uncover the content of political ads by focusing on the emotive character of the campaign language. Adopting a multi-method approach involving visual and qualitative content analysis of fifty-five ads, I examined the characteristics of communication materials distributed prior to the election. I looked at the type of tone, theme, language, music, visuals, and emotions these ads displayed. The main findings of the study are the following: (1) Kızılyürek's political stance, which favors a solution to the problem of Cyprus based on creating a federation with Greek Cypriots, is literally reflected in each ad; (2) issue-based ads that underline political issues in the country were preferred to image-based ads that highlighted the personal qualities of the candidate; (3) both emotional appeals (associated with feelings such as hope and enthusiasm) and logical appeals (which tended to promote rational information processed by the conscious mind) were employed in the ads; and, (4) the overall tone of the ads was positive in nature, while negative emotions were completely avoided in this campaign.

Keywords: *Election campaigns, emotional appeals, political advertisements, Turkish Cypriots, Cyprus.*

1. Introduction

Political communication campaigns are employed to shape peoples' political attitudes and behaviors. These campaigns do not merely inform individuals in society about the choices available to them, but they are also designed to persuade (McNair, 2003). They always have the objective of influencing a target group of people. Political communication is cultural (Schudson, 2001); 'it is composed of symbols and language, rituals and performances' familiar to a particular society (Ryfe, 2001: 416). Political actors need to express themselves to create a change in hearts, minds and behavior, or to ensure the continuity of existing thought and behavior. They use advertisements to communicate with a large proportion of voters (Moorman and Neijens, 2012). Ads are one of the few forms of communication over which political actors have complete control and are important as they give some clues about what politicians will do in elected positions.

Although an emotionally overwhelming 20 or 30 second spot or a simple evocative poster ad does not provide room for a candidate to give a thorough explanation of their plans, it is suggested that people do learn from political advertisements, at least to a certain degree (Vafeiadis et al., 2018; Valentino et al., 2004; Chang, 2001). Political ads, loaded with emotions, matter even if their effect sizes are small or short-lived (Franz and Ridout, 2007). They increase issue knowledge, influence perceptions of a candidates' character, and affect voter preferences (Benoit et al., 2007; Franz and Ridout, 2010; Atkin and Heald, 1976).

Bearing the above conceptualizations in mind, my intention with this study is to show how political ads, as a genre of political discourse, are created in a particular cultural context and environment by using different signifying practices, among which are slogans, visuals, music, and language. By doing this, I contribute to research in political advertising and throw some light on how political ads function as sign points of ideological and historical developments in a country. I focus on the nature and the characteristics of Niyazi Kızılyürek's political advertising campaign that targeted the Turkish-speaking Cypriot community in the northern part of the island during the 2019 European Parliament (EP) elections. I evaluate the verbal and visual characteristics and the emotions rooted in the language of fifty-five pieces of propaganda material. I have chosen these materials and not others because they best reflect the actual position of the candidate.

May 26, 2019 marked an exceptional election day in Cyprus. Using their Cypriot identity cards, Turkish Cypriots living in the de facto divided Mediterranean island and residing in the north passed through checkpoints to the south and voted in polling stations for the elections to the European Parliament that were being held in areas controlled by the Republic of Cyprus. There were nine Turkish Cypriots in the running to be MEPs: two candidates from the Cyprus Socialist Party, and six from the left-wing Jasmine Movement, none of whom won a seat in parliament. Niyazi Kızılyürek, a prominent Turkish Cypriot academic who is considered to be on the left side of the ideological spectrum, was another candidate running on the list of the main opposition leftist party, the communist-

rooted Progressive Party of Working People (AKEL), in the Greek-controlled south. He is also supported by the socialist Turkish Cypriot Republican Turks' Party (CTP), often branded a Turkish Cypriot extension of AKEL. Kızılyürek's candidacy sparked much controversy on both sides of the UN divide, with each side seeing him as an agent of the other.

Leaving all these speculations behind and running a bilingual election campaign (both the Turkish and Greek language) across the island, Kızılyürek received a majority (72 per cent) of votes from Turkish Cypriots who participated in the elections and was elected a Member of the European Parliament. *Al Jazeera* announced this victory by stating: 'Cyprus elects first Turkish Cypriot to European Parliament' (May 27, 2019). For the first time in the political history of Cyprus, and moreover since the deadly intercommunal clashes in 1963, a Cypriot with a Turkish ethnic background was elected to the European legislature, giving Turkish Cypriots a voice in public affairs. The leading motto of his campaign was 'Let's remember, we are Europeans!' – a simple and catchy slogan that was not difficult to grasp. The island has been divided by human-made barriers and troops from both sides, and riven physically and psychologically by ethnic division, for half a century. In such an environment, campaigners relied on references to a higher-level ethnic identity: a European one.

The research is driven by the following guiding questions: First, what type of slogans and messages were circulated? Political ideologies are presented to the world via persuasive language and the type of language campaigners use, and uncovering the emotions rooted in language is a relevant task. What type of information is selected to support language intended to do political work? And what type of themes, sounds, and visuals dominated the campaign? By focusing on the 2019 European Parliament election campaign of Kızılyürek, this research will suggest some answers to such questions.

A number of studies acknowledge that the content and emotions rooted in the language of political messages can influence attitudes regarding political candidates. Cho (2013), Matlock (2012), Fausey and Matlock (2011), Benoit et al. (2007), and Lau and Redlawsk (2006) all acknowledge that campaign tone and language may shape everyday thought in the political realm; the positive or negative wording of political messages can influence people's attitudes about political candidates, and, under certain conditions, information can affect a candidate's electability. This study is situated within the domain of qualitative content analysis (Schreier, 2014; Ravitch and Carl, 2020), which recognizes the political dimension of language use, thus stimulating discussion about how the production of political ads is affected by political, economic, cultural, and historical dynamics in Cyprus. Additionally, visual analysis is employed, as visuals, similarly to text, contain ideological representations and make use of various rhetorical tools such as metaphors, depictions, and symbols that are intended to capture the essence of an issue (Helmers, 2006). Also, visual symbols are at the core of political communication: 'they can have rhetorical impact and make persuasive arguments to viewers,' and they can quickly communicate emotions (Schill, 2012: 122).

Drawing on these ideas, in the following sections I review the scholarly literature on political advertisements, along with the conceptual background of emotions in politics and emotional appeals in political ads. The results not only add to our knowledge of political ads, but also show that ads can signal which issues are under discussion in society.

2. Political advertisements and emotional appeals in ads

Political advertising is the oldest form of propaganda and persuasion. It is designed to change our attitude and feelings toward an idea or person (Jowett and O'Donnell, 2012). Much of the relevant work on the emotions in political ads holds that propaganda and persuasion has psychological and ideological effects (O'Keefe, 2002). Persuasion, for example, is defined as a form of attitude change; as 'a successful intentional effort at influencing another's mental state through communication' (O'Keefe, 2002: 5). Propaganda, similarly, is a form of political language used to convince specific publics; to win them over and to convert them; it involves a deliberate, systematic attempt to shape perceptions and is ideology laden (Jowett and O'Donnell, 2012). Political ads use a plethora of propaganda and persuasive techniques to get their message across.

The persuasive power of political ads has long been investigated as a form of communication, and there is a considerable literature about their application in this regard (Cho, 2013; Moorman and Neijens, 2012; Ridout and Searles, 2011; Franz and Ridout, 2007; Brader, 2006; Goldstein and Freedman, 2002; Prior, 2001; Bolivar, 2001; Rahn and Hirshorn, 1999; Jamieson, 1989). Within this stream of research, most studies show that well-designed political advertising campaigns can provide 'people with the information that they need to make enlightened decisions about which candidates best represent their interests' (Ridout and Franz, 2011: 6), can stimulate voters' interest in a campaign, and can produce more positive affect toward a candidate (Atkin and Heald, 1976). These studies not only demonstrate the difficulty of separating emotions from logical reasoning, but they also signify that emotions play a fundamental role in reasoning: that emotion and reason are cooperatively interrelated (Brader, 2005). 'Emotions influence attention, decision-making, attitudes, and action in the realm of politics' (Brader and Marcus, 2013: 165). Emotions play a significant role in shaping human behavior; they are one of the key components of politics (Gabriel and Masch, 2017), as are political ads (Moorman and Neijmans, 2012).

The vast majority of research on emotion within politics and political psychology has been conducted in the United States and Western Europe during the past several decades, and may be basically divided into two types: which involves the study of leaders, political candidates, and public or voter support (Redlawsk and Pierce, 2017; Valention et al., 2011; Brader, 2013; Neuman et al., 2007; Redlawsk, 2006; Chang, 2001), and which studies political advertisements (Vafeiadis et al., 2018; Cho, 2013; Benoit, 2000). The first group of researchers have approached the field by applying the lenses of political sciences and political psychology, while the second group of researchers have used social sciences,

political communication, and cultural and media studies perspectives. Despite the difference in types of scrutiny, research on emotions in politics and emotional appeals in political ads has revealed similar findings. Such studies maintain that communication that fosters a positive mood induces a more positive assessment of politicians, whereas communication that promotes a negative mood increases the level of negative judgement of candidates who are simultaneously rated in electoral settings (Gabriel and Masch, 2017; Weber, 2012). For example, the overview of Brader and Marcus (2013) of current approaches to the study of emotion and politics makes an important contribution to this discussion. The authors confirm that communicating anger, fear, and sadness produce negative feedback, whereas positive or 'feel-good' emotions are associated with general satisfaction with life. For example, communicating enthusiasm suggests expectations in relation to what is happening and what lies ahead and thus motivates political action, while promoting hope strengthens the yearning for better things (Brader and Marcus, 2013).

Emotional appeals in ads also have a long history in political advertising campaigns, but few scholarly works have analyzed the characteristics of campaign ads and the emotions rooted in the language of ads (Kaid and Johnston, 2000; Lau and Pomper, 2004). A notable exception is the pioneering work of Vafeiadis et al. The content analysis of 243 ads during the 2014 gubernational and senatorial election by the latter authors (Vafeiadis et al., 2018) looked at the characteristics of these campaigns: the candidates' status, party affiliation, gender, campaign outcome (won or lost), type of narrative ads (autobiographical, voter stories, or testimonials), tone of ads (positive/advocacy or negative/attack), type of appeals (logical or emotional appeals, and source credibility), style of videos, and types of dominant speakers. For instance, positive ads were more likely to have voters or candidates themselves as the dominant speaker, while anonymous announcers served as the dominant speakers in negative ads (Vafeiadis et al., 2018). Borrowing the idea of Johnston and Kaid (2002), authors have also evaluated the type of emphasis in political ads: for instance, image-based ads that highlight the personal qualities of a candidate, and issue-based ads that underline political issues in a country.

Brader (2006; 2005), who studied the use of uplifting music and feel-good imagery in campaign advertising, also offers some insightful observations that help to explain the characteristics of political ads. Survey and experimental evidence from Brader (2006) highlights that integrating words, music, and images into a well-narrated story helps to stir emotions and create emotional impact among the public. Brader (2006) also highlights that positive campaign narrations that signal hope, pride, and trust suggest that conditions are good, while negative narrations that include hostility, uncertainty, and anger suggest they are bad (Brader, 2005). The same line of thought is found in the work of Ridout and Franz (2011), who experimentally analyzed televised ads and claimed that advertising has the potential to scare viewers into voting for certain candidates, or to increase the likelihood of voting for a candidate: 'Many evoke feelings of enthusiasm, hope, or joy, cued with a crescendo of uplifting music […] Some ads, by contrast, are

negative and nasty, attacking an opponent's policy ideas or personal character' (Ridout and Franz, 2011: 1). The work of Ridout and Searles (2011), involving an analysis of 631 unique ads aired in 26 different U.S. Senate races, makes another important contribution to this discussion. Ridout and Searles (2011) uncovered the fact that emotional appeals that apply one of two dimensions (happiness or aversion) can influence political attitudes and people's evaluations of political candidates.

Most of the research on the study of the emotional appeal of political ads is quantitative in nature, relying on laboratory experiments and surveys. These studies have neglected to delve deeply into single ad campaigns and ask questions about the nature of the political ads themselves, the type of emotions rooted in language, and the persuasive relationship between advertising text and meaning; namely, the information that a candidate intends to communicate to a voter. Based on theories of emotions in political ads, this research is a modest attempt to fill this gap.

3. Data and methods

Data is derived from the 2019 European Parliament election campaign of Niyazi Kızılyürek in the northern part of Cyprus. For this comprehensive empirical research, all of the political advertising materials that were systematically prepared to promote the candidate were collected. The analysis covers the period from April 2, 2019, the beginning of the distribution of campaign materials, to May 26, 2019 – the official European Parliament election day in Cyprus. In order to answer the research questions, fifty-five pieces of propaganda material were analyzed. The sample consisted of 24 videos, with an average length of 12 to 50 seconds, 27 posters, materials uploaded to the official Facebook and Instagram accounts of the candidate, three billboard advertisements located in popular squares of the cities of Nicosia, Famagusta, and Kyrenia, and one leaflet introducing the candidate himself and his ideological position. I additionally made use of data uploaded to the official web page of the candidate (https://tr.niyazikizilyurek.com/). Data were in Turkish and have been translated into English by the author.

Adopting a multi-method approach, qualitative content analysis (Schreier, 2014) was initially applied to the fifty-five pieces of propaganda material. The goal of qualitative content analysis is the systematic examination of communicative material (Mayring, 2004). This technique is especially appropriate for focusing on the characteristics of language as communication, with an emphasis on the content or contextual meaning of text. It is a method that helps with the subjective interpretation of the content of text data. Visual analysis was then employed to examine the visual descriptions that accompanied the text (Helmers, 2006). Scholarly work acknowledges that visual images play a central role in constructing political images (Schill, 2012). They 'matter more than words in creating a feeling about a candidate' (Brader, 2006: 30), and transmit emotional impact more powerfully than spoken words (Jowett and O'Donnell, 2012). Departing from this line of thinking, analysis was undertaken on the visuals (what is the main figure,

and/or what is left out?), the color (which colors are used?), image bites (what types of visual shots are used to support the candidate's objectives?), and symbolic elements and signs (are any of the aspects of this piece symbolic?). Sound preferences (what type of music accompany the text and visuals?), and sound bites, if any, were additionally analyzed.

A codebook was created highlighting the theme, the sound, and the visual symbols in each ad and whether the overall tone was positive or negative: 'Positive promotional ads were defined as those favorably promoting the candidate, whereas negative attack ads represented those ads that attacked the opposing candidate' (Vafeiadis et al., 2018: 359). The findings were presented at three basic levels: (1) language, theme, and verbal symbolization; (2) visual symbolization; and (3) the sound and music preferences of the campaign. According to this approach, the first element for analysis was the content of each piece of propaganda material with respect to frequent themes and issues used to ascribe meaning to the campaign; for example, whether it used issue-related ads or character-based ads. In that same section, language and tone were evaluated in an attempt to understand the construction of themes; for example, do they apply a positive (promotional/advocacy) or negative (attack) strategy in relation to the overall tone; do the campaign slogans elicit enthusiasm and hope, or fear and anger; how is the candidate presented; what kind of narrations are embedded within the political slogans; and who is the dominant speaker? Second to be analyzed were the non-verbal elements, including political image-making and the use of visual symbols (e.g. flags or doves). I analyzed what kind of images are portrayed and the logic behind the dominant colors that were used (e.g. were bright colors used, or simply black and white?). Finally, the choice of music used in audio-visual elements was appraised in terms of the ideas and information this transmitted; what type of music or melody was used; what was the style of the music; what kind of message did it convey?

To fully understand the rationale of the campaign, a key member of the campaign team was interviewed and original visual materials from the graphic designer were retrieved. Findings are presented and discussed in the section that follows.

4. Findings

4.1 Language, theme, and verbal symbolization

The findings demonstrate that in the 2019 EP election campaign in Northern Cyprus, all of the political ads contained information on Kızılyürek's position in relation to specific political issues (issue-ads), and there were no ads containing information about the personal characteristics of the candidate (image-ads). The type of issues covered in the ads reflected the environment at the time in the country, namely political deadlock in Cyprus, isolation, or a lack of recognition. The top three themes emphasized in the ads included: (1) the identity struggle of

Turkish Cypriots; (2) the candidate's goals of reunification and federalism; and, (3) the longstanding peace-building efforts on the island.

First and foremost, many of the ads reflected the theme of an identity struggle, highlighting the fact that Turkish Cypriots have or share a European heritage: 'Let's remember, we are Europeans!' proclaims Kızılyürek. In one leaflet, he also claims that 'We are both European and Cypriot. This means that we are both citizens of the European Union and have rights across the whole of Cyprus. It's time to free our identity and citizenship properties!' and in another poster, 'Remember, we are EU members, let's vote and have our voice reflected in parliament!' In both cases, the candidate was the dominant character. Kızılyürek attempts to spread a positive feeling of Europeanness that was reinforced in many of the ads. In several posters in which the dominant speaker was a voter, the same theme is promoted: 'I am a European citizen, and in the European Parliamentary elections of 26 May, I will vote for Kızılyürek!' and 'I am European, I am an EU citizen, I will vote for Kızılyürek!' Nineteen ads were designed in this fashion, all advocating a European identity in a positive tone. These slogans are clever enough to help their audience recall their European identity.

From a slightly different perspective, a few ads in which voters were portrayed make indirect references to prolonged political isolation. Given that the Turkish Cypriot north of the island is regarded as an occupation force by the Republic of Cyprus, the European Union as a whole, and the international community and has no real independence, these ads propagate the idea that Kızılyürek's victory will make the existence of the inhabitants thereof visible in Europe: 'Our voice in Europe' read huge billboards throughout the three most populous cities of Nicosia, Kyrenia and Famagusta. 'To make my voice heard in Europe, I will vote for Niyazi Kızılyürek in the 26 May European Parliament elections!' say Mertkan Hamit, an activist, and Bilge Azgın, an academic. This narrative serves to propagate the fact that, no matter what the current political and economic conditions are, Kızılyürek's victory will somehow provide a recognizable 'voice' for the Turkish Cypriot community in international affairs. Additionally, three audio-visual ads promote European values and principles: 'For LGBTQ rights!', 'For gender equality!', and 'Due to the educational opportunities that the European Union will provide for the youth of this society, I am voting for Kızılyürek!'

Identity is the word for people's sense of who they are. National identity is the primary form of identity that creates a sense of belonging. It is based on the binary opposition of 'us' versus 'others', which creates unity among members of the 'us' group and highlights its difference from the 'they' group (Billig, 1995). Given that campaign advisors try to manage public feelings, here they employ an identity discourse advocating that Turkish Cypriots are European citizens and not Turkish ones, which allows the former to imagine they belong to the Western world and to fantasize about a Western way of living. The purpose is just as clear – namely, to create enthusiasm and positive emotion in the viewing public. The long-lasting identity struggle of the Turkish Cypriot community in terms of either being Turkish and Turkish Cypriot, or Cypriot and European, once again becomes

obvious in this campaign. Here, the campaigners completely ignore the Turkish part of voters' identity and divert the entire narrative to focus on a European identity. This rhetoric is highly Eurocentric, favoring Western civilization and representing a desire to reach Western standards of living. It is widely accepted that European identity represents the occident;[1] politically, sociologically, ideologically, and imaginatively a liberal, enlightened, democratic, free, and modern Western civilization with Romanesque architecture, Renaissance paintings, Descartes' philosophy, and Beethoven's music. Propagating the fact that Turkish Cypriots are European might be an attempt to demonstrate that they are developed, civilized, and open-minded people, in severe contrast to their Turkish identity, which is largely associated with an orientalist discourse. Highlighting voters' European identity may also be a deliberate move to elevate Turkish Cypriots above Turks from mainland Turkey. This move starkly contrasts the Eastern civilization that Turkey is associated with; an economically backward, low-waged, uncivilized, and poorly educated (by Western standards) country with a majority Muslim population, and weak democratic system (cf. Hamid-Turksoy, 2012).

The second type of ads make reference to the theme of unity, propagating a federal Cyprus: 'I want Armenian, Maronite, Latin, Turkish, Greek and all citizens to live in peace in the Federal State of Cyprus' says Kızılyürek in one poster, and 'The votes of the Turkish Cypriots are very important. These are votes for peace, brotherhood, cohabitation, and federalism' in another. In a leaflet Kızılyürek can be seen stating that 'Turkish Cypriots are part of the European Union's citizenship community. They are the original founders of the Republic of Cyprus, and they have the opportunity to re-establish the right of partnership by converting the country into a federal state.' These ads are accompanied by an image of Kızılyürek's confidently smiling face. Pro-reunification supporters are also used in these ads as the dominant speakers. For example, in four video ads, a peace activist, an English teacher, an academic, and a student state the following: 'I am for a federal solution in Cyprus, I will vote for Niyazi Kızılyürek in the May 26 European Parliamentary elections!' This type of logical ad propagates the idea that a unitary solution concerning the reunification of Cyprus is possible through federalism. Here the campaigners attempt to spread rational information processed by the conscious mind.

The third type of ads make reference to the theme of peace. Six videos, each lasting 12 seconds, use sound bites of voters saying: 'To raise the language of peace!', 'To live in peace in Cyprus!' and 'To establish peace in Cyprus, I am voting for Kızılyürek!' and, 'I am here for a demilitarized Cyprus!' and 'I am here for peace in Cyprus, I vote for Niyazi Kızılyürek!' Other slogans on leaflets that position Kızılyürek as the dominant speaker read: 'Hopes of peace are disappearing in our country. We can't just watch this happen!' and 'Hopes for peace are fading in our country, we can't stand by!' On his official homepage,

[1] A political term covered in Edward Said's (1979) book *Orientalism*, a Eurocentric construction of an artificial binary opposition between the Western world (the Occident) and the eastern world (the Orient), primarily the Middle East and Asia.

Kızılyürek also proclaims: 'I was born from the conflicts of the past, and as I dream of unity my efforts go to helping all of the Cypriots to walk along the path of peace and live together in their common homeland.' Kızılyürek, to a certain degree, was presented as the hope for peace; the hope of a community that errors of the past could be corrected. Envisioning himself as a healer of divisions, Kızılyürek knew how to exploit this, particularly with rational arguments making reference to the political instability, ethnic division, and conflict that Greek and Turkish Cypriots have endured over the last half-century. This was done skillfully in a 50-second video advertisement in which Kızılyürek expressed his commitment to transforming Cyprus into a peaceful country. Via this video, he transported the audience to an idealized Cyprus. The latter juxtaposes images of men and women of different ages hugging each other and walking or biking in the same destination with their IDs to the ballot box, thus creating an energetic carnivalesque atmosphere. Happy, joyful, and positive people are in fact everywhere, smiling faces too. The ad begins with a young woman standing in front of the window and opening the curtain. Then Kızılyürek's smooth voice and poetic pronunciation deliver the following message:

> It's a beautiful day today; we are opening the curtains of our geography and taking the world in. Today, we are going to the great feast of democracy to say that we are also at this wonderful feast. Today, we are meeting millions of our own citizens. It's a hopeful day today; we are going to be integrated with our united country and with all of Europe.

The arrangement of ideas in this ad is effective. It uses a peaceful, sentimental tone to elicit an emotional reaction from the viewing public. The tone and content of Kızılyürek's speech is carefully structured to support the emotional response that uniting Cyprus with Europe (thus not with Turkey or Greece) is the only solution to the long-standing issue of Cyprus and creating a better future and life. In other words, this ad attempts to present the divided island of Cyprus as united by suggesting that there is hope for unity, and this election is a good opportunity to achieve this. Cyprus is presented as the common homeland of all Cypriots. This positive attitude is fostered especially through the application of key phrases such as 'we,' 'our,' and 'united country.'

In sum, the absence of mention of a Turkish identity and the representation only of Turkish Cypriots as European starkly contrasts with the fact that, in history, 'Turkish Cypriot identity formation was based on identification with Turkey' and was influenced by the emergence of modern Turkey, which adopted Mustafa Kemal Atatürk's secular reforms in 1920s (Kızılyürek and Gautier-Kızılyürek, 2004: 37). During that period, Turkish Cypriots constructed Turkey as their 'motherland,' as 'mother Turkey,' and as an organic whole, a 'suprafamily' to which they belonged (Kızılyürek and Gautier-Kızılyürek, 2004: 45). As Kızılyürek (2003: 198) describes it, Turkish Cypriot identity formation developed 'mainly in reaction to the Greek Cypriot national desire [for] union with Greece.' Turkey 'became the idealized romantic motherland which would

protect "the lonely children," who perceived themselves as "the helpless remains" of the collapsed Ottoman Empire' (Kızılyürek, 2003: 199). Moreover, in this period the Turkish Cypriot identity '[shifted] from the Islamic traditional one to an ethnic secular identity' (Kızılyürek, 2003: 200), and 'a strategy of discourse that "there is nothing Cypriot [about] Turkish Cypriots, they are just Turks in Cyprus" was adopted' (Kızılyürek, 2003: 202). In the ads, this historic milestone of Turkish Cypriot identity formation is completely overlooked, and the focus is on merely propagating the discourse construct of European identity. We learn from the literature that individuals formulate identity accounts that link their past and present to a desired future. At its essence, identity refers to individual self-definition; i.e. how people answer the question *who am I?* or *who are we?* Identity construction, then, is the process through which individuals come to define who they are (Anderson, 1983). In respect of this contrast, it is important to note that the formation of a European identity in the Turkish Cypriot community has not been established yet; for many Turkish Cypriots it is an identity under construction, as many individuals still struggle to define themselves. The campaign was thus launched in the circumstances that Turkish Cypriots, especially the older generation, require a situated identity, or a reasonably clear sense of who they are.

4.2 Visuals and symbolization

Examination of the visual symbols and colors used in the political ads reveal that both young and old and heterosexual and homosexual people from different walks of life and with different occupations – such as lawyers, civil engineers, academics, journalists, activists and students – took part in the propaganda materials as dominant speakers; all recalling that they are Europeans, and all stating in the run-up to voting on May 26, 2019 in the European Parliamentary elections that they would cast their vote for Kızılyürek. This particular choice of visuals says something about Kızılyürek's target audience: that he seeks to embrace everyone.

Especially noted were the images of 18-year-old boys and girls with happy faces who would be voting for the first time in their lives that served as the primary backdrop for the ads, sharpening the message's effectiveness. Eight poster ads followed this fashion. 'My first vote is to Niyazi Kızılyürek' read these ads, and continue: 'I am a European, an EU citizen, and I will go to the ballot box for the first time in the European Parliament elections to free my identity and citizenship.' In this way, members of the young generation are integrated into the campaign and presented as politically active voters. Using young people seems to be an attempt to spread a message of generational change, suggesting that youngsters are willing to negotiate fruitfully and understand politics in a new way, especially in comparison to their ancestors and older generations, who are believed to support the current status quo and hence take part in maintaining the continuing dispute in Cyprus.

Visuals here are rich in color, with warm light. The campaigners utilized particularly bright colors to associate the candidate with a positive image. No black and white colors were used at all in the entire campaign. Instead, red and white

were predominant. This choice is not accidental, as these colors evoke the party colors of AKEL, the Marxist–Leninist and communist political party that Kızılyürek was nominated to. It is well known that AKEL supports an independent and demilitarized Cyprus and a federal solution to the internal components of the problem of Cyprus. By using red and white, campaigners aim to recall this information. On the official web page of the candidate, AKEL's colors, red and white, were also prevalent. Another attention-grabbing symbol on the page was a white pigeon. Needless to say, white pigeons or doves are used in politics as symbols of peace, love, honor, and purity, in opposition to war and violence. The campaigners utilized this rhetoric. By so doing, they additionally recalled CTP party support for the candidate by frequently using the image of a dove carrying an olive branch in their propaganda materials.

In some ads we see a happy image of the candidate photographed with the united Cyprus flag. In these visuals the campaigners attempt to communicate a message with an object that elicits emotion. Since iconic and societal symbols can be more impactful than words, these types of visuals are often used in political contexts to draw on the emotional power associated with them. A candidate surrounded by a united Cyprus flag, for instance, can signify Cypriot patriotism and political unity on a divided island. To some degree, it can be argued that Kızılyürek was taking advantage of the flag's patriotic and mythical symbolism.

4.3 Preferences for sound and music

We know that the use of stirring patriotic anthems, protest songs, music, and exhilarating melodies and lyrics are key propaganda techniques (Jowett and O'Donnell, 2012). When we look at the internal structure and the amount of content expressed by music in the present case, we see that all of the video ads were accompanied by the melody of the official anthem of the European Union, Ode to Joy, which comes from the Ninth Symphony by Ludwig Van Beethoven, composed in 1823 inspired by the original poem. The anthem contains no words, but instrumental music only. The melody is simple, almost elementary, and of a clear musicality to which it is easy to listen. This melody was strategically picked for this campaign because, in the universal language of music, the anthem has ideological meaning; it symbolizes European ideals of freedom, liberty, solidarity, peace, fraternity, and human happiness. This music, therefore, did not just exist per se; it was full of meaning and used to embody the idea of togetherness and unity: the key message that Kızılyürek wanted to disseminate to the Cypriot community.

For half a century, the Turkish Cypriots have been exposed to the national anthem of the Republic of Turkey: İstiklâl Marşı (the Independence March). This is a patriotic musical composition that evokes and eulogizes the history, traditions, and struggles of the Turkish people. While unappealing to Turkish Cypriots, it has been used at all public occasions as the official anthem of the Turkish Cypriot community. The Kızılyürek campaign's choice of music that evoked the official

anthem of the EU was not accidental. To a certain degree, it might have been an attempt to debunk or disregard the national anthem of the Republic of Turkey.

It is interesting here to reflect on the fact that even though the campaign promoted the idea of Cypriot unity, using the national anthem of the EU instead of the anthem of Cyprus was a rational decision. This is because the national anthem of the Republic of Cyprus, Hymn to Liberty, is also the national anthem of Greece; a country which has negative connotations for Turkish Cypriots, sharing with them a tragic past and war trauma. So, while the campaign attempted to promote a peaceful Cyprus with the Republic of Cyprus flag, it systematically avoided using any discourse that recalled Turkey, a country with slightly negative connotations, or Greece, the counter-constructed motherland of Greek Cypriots, as this could have sparked anger, fear, and anxiety, rather than enthusiasm and hope among the Turkish Cypriot community. In sum, excluding anything that could evoke Greece was an appropriate decision as the desire of the Greek Cypriots to unify the country with Greece has been perceived by the Turkish Cypriots as a danger to their own existence, causing deep insecurity in the past (Kızılyürek and Gautier-Kızılyürek, 2004).

5. Conclusions

The present research is among the first to examine the use of the visual, oral, and emotional content embedded in political ads for the 2019 European Parliament elections in Northern Cyprus. It explored the (partially) strategic modes of communication practiced in Kızılyürek's 2019 election campaign. Specifically, I have focused on propaganda materials targeting the Turkish Cypriot community. The analysis sheds some light on the use of political ads, revealing that they are part of a more complex political and social process, and that the issues they highlight function as signifiers of historical and political developments in Cyprus. The evidence yields four major findings.

First, the results, for the most part, are consist with previous scholarship about political ads (Vafeiadis et al., 2018; Johnston and Kaid, 2002), and support the notion that, regardless of the theme, issue-related advertisements are preferred to character-based advertisements. In the case under examination, the country's political agenda was in conflict; this unstable environment was reflected in all the propaganda materials that were investigated. Specifically, the campaign was positioned around three main issue-based ads: one highlighted the European identity of Turkish Cypriots, one advocated for unity and federalism, while the final one called for peace. By emphasizing the political themes important to Turkish Cypriots, the campaign reinforced the feeling that Turkish Cypriot votes matter.

Second, in terms of the types of appeals utilized in the ads, evidence suggests that campaigners employed two different types: emotional appeals, and logical appeals, and that both have a significant relationship to the types of issues covered. Emotional appeals, designed to affect the unconscious mind and associated with feelings such as happiness, hope, and enthusiasm, were promoted

by association with the rhetoric of a European identity; logical appeals, however, which tended to promote information designed to be rationally processed by the conscious mind, promoted an idealized Cyprus based on a unitary state and federalism. Past research has also found that 'advertisers employ primarily two types of persuasive strategies – rational vs. emotional – to persuade' the public (Bhatia, 2019: 435). The present results support this claim, as it was found that both emotional and rational appeals were employed.

Third, the findings also illustrate that, in terms of the tone of the ads, all were positive in nature. Research has found that positive messaging leads to more positive evaluations of a candidate (Chang, 2001). This study contributes to the literature on positive versus negative ads. Kızılyürek and his campaign advisors explicitly avoided attacking other candidates or distributing any messages that could evoke fear, sadness, or negativity; instead, they put forth a positive approach to campaigning. Since the tone of advertising affects the public mood, no sarcasm, sadness, or fear was evoked throughout the entire campaign. No negative sentiments that would lead to recall of the old, bad days of tragedy, war, division, and loss of life during the violent disputes, especially during 1974 and 1963, were encountered. On the contrary, upbeat and optimistic verbal and visual symbols were circulated by the candidate or supporting voters. Kaid and Johnston (2000) found that almost half of the time the primary speaker in positive advertisements was the candidate themselves. In the present case I found a balanced distribution of dominant speakers: the voice and the image of the candidate and real voters were almost equally represented.

Finally, footprints of overt Turkish nationalism or chauvinistic propaganda were not observed in this campaign. Instead, it can be claimed that Cypriot patriotism was promoted. We know that the open interface of Turkey with Turkish Cypriot affairs, population transfer from Turkey, the Turkish army's control over all spheres of life, and economic and political isolation threaten the very existence of the Turkish Cypriot community, who have started to identify their motherland as Cyprus (Kızılyürek and Gautier-Kızılyürek, 2004: 51). In this campaign, a discourse suggesting a new Cypriot nationalism and Cypriot patriotism, or Cypriotism, was constructed. This focuses on the shared identity of Greek and Turkish Cypriots, and highlights their common culture, heritage, traditions, and political, economic, and social rights (Doob, 1986). Kızılyürek wants to show that he sees Cyprus as the *patrie* (fatherland) of all Cypriots. This discourse runs counter to the old ideological construct that positions Turkey as the motherland of the Turkish Cypriots, which has remained a subconscious belief of Turkish Cypriots for decades. The campaigners understood and knew their audience well; that their beliefs, values, attitudes, and behaviors are different to those of mainland Turks. They therefore designed a message that would fit well, and this message was a united Cyprus.

This research examined the short-term aspects of an electoral campaign and produced some interesting findings. However, there are some limitations that should be highlighted. This research did not actually test the *effects* of political messages on voters. Examining the campaign's influence on voter choice would

certainly be a worthwhile pursuit, but this goes beyond what could be accomplished here. Also, generating a true understanding of political persuasion and propaganda requires a longitudinal analysis of the long-term effects of propaganda agents, media, social networks, cultural myths, the economy, and government on the public.[2].

References

Anderson, B. (1983) *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London: Verso.

Atkin, C. and Heald, G. (1976) Effects of political advertising. *Public Opinion Quarterly, 40*(2): 216–228. https://doi.org/10.1086/268289

Benoit, W. L., Leshner, G. M. and Chattopadhay, S. (2007) A meta-analysis of political advertising. *Human Communication, 10*(4): 507–522. Available at https://epublications.marquette.edu/cgi/viewcontent.cgi?article=1008&context=comm_fac Accessed: 29-04-2020.

Benoit, W. L (2000) A functional analysis of political advertising across media, 1998. *Communication Studies, 51*(3): 274–295. https://doi.org/10.1080/10510970009388524

Bhatia, T. K. (2019) Emotions and language in advertising. *World Englishes, 38*(3): 435–449. https://doi.org/10.1111/weng.12420

Billig, M. (1995) *Banal Nationalism*. London: Sage.

Bolivar, A. (2001) Changes in Venezuelan political dialogue: The role of advertising during electoral campaigns. *Discourse & Society, 12*(1): 23–45. https://doi.org/10.1177/0957926501012001003

Brader, T. and Marcus, G. E. (2013) Emotions and political psychology. In Huddy, L., Sears, D. O. and Levy, J. S. (eds.) *The Oxford Handbook of Political Psychology*. Oxford: Oxford University Press. 165–204. https://doi.org/10.1093/oxfordhb/9780199760107.013.0006

Brader, T. (2006) *Campaigning for Hearts and Minds: How Emotional Appeals in Political Ads Work*. University of Chicago Press.

Brader, T. (2005) Striking a responsive chord: How political ads motivate and persuade voters by appealing to emotions. *American Journal of Political Science, 49*(2): 388–405. https://doi.org/10.1111/j.0092-5853.2005.00130.x

Chang, C. (2001) The impacts of emotion elicited by print political advertising on candidate evaluation. *Media Psychology, 3*(2): 91–118. https://doi.org/10.1207/S1532785XMEP0302_01

[2] I am very grateful to Prof. Dr. Ahmet Sözen for reading and commenting on the first draft. I am also indebted to Dr. Okan Dağlı for his assistance in data gathering, and to two anonymous reviewers for their thorough comments on previous drafts of this article.

Cho, J. (2013) Campaign tone, political affect, and communicative engagement. *Journal of Communication, 63*(6): 1130–1152. https://doi.org/10.1111/jcom.12064

Doob, L. W. (1986) Cypriot patriotism and nationalism. *The Journal of Conflict Resolution, 30*(2): 383–396. https://doi.org/10.1177/0022002786030002008

Fausey, C. M. and Matlock, T. (2011) Can grammar win elections? *Political Psychology, 32*(4): 563–574. https://doi.org/10.1111/j.1467-9221.2010.00802.x

Franz, M. M. and Ridout, T. N. (2010) Political advertising and persuasion in the 2004 and 2008 presidential elections. *American Politics Research, 38*(2): 303–329. https://doi.org/10.1177/1532673X09353507

Franz, M. M. and Ridout, T. N. (2007) Does political advertising persuade? *Political Behaviour, 29:* 465–491. https://doi.org/10.1007/s11109-007-9032-y

Gabriel, O.W. and Masch, L. (2017) Displays of emotion and citizen support for Merkel and Gysi: How emotional contagion affects evaluations of leadership. *Politics and the Life Sciences, 36*(2): 80–103. https://doi.org/10.1017/pls.2017.15

Goldstein, K. and Freedman, P. (2002) Lessons learned: Campaign advertising in the 2000 elections. *Political Communication, 19*(1): 5–28. https://doi.org/10.1080/105846002317246461

Hamid-Turksoy, N. (2012) Turkey's representation in the European media: A glimpse to France, Germany and Britain. In Bilgili, C. and Tan Akbulut, N. (eds.) *Broken Grounds 1: Mass Communication and Transformation*. Sofia: Prof. Martin Drinov Academic Publishing House. 135–152.

Helmers, M. H. (2006) *The Elements of Visual Analysis*. Pearson Longman.

Jamieson, K. H. (1989) Context and the creation of meaning in the advertising of the 1988 presidential campaign. *American Behavioral Scientist, 32*(4): 415–424. https://doi.org/10.1177/0002764289032004007

Johnston, A. and Kaid, L. L. (2002) Image ads and issue ads in U.S. presidential advertising: Using videostyle to explore stylistic differences in televised political ads from 1952 to 2000. *Journal of Communication, 52*(2): 281–300. https://doi.org/10.1111/j.1460-2466.2002.tb02545.x

Jowett, G. S. and O'Donnell, V. (2012) *Propaganda and Persuasion*. 5th ed. London: Sage.

Kaid, L. L. and Johnston, A. (2000) *Videostyle in Presidential Campaigns: Style and Content of Televised Political Advertising*. Westport, CT: Praeger. Available at https://publisher.abc-clio.com/9780313000683 Accessed: 21-04-2020.

Kızılyürek, N. and Gautier-Kızılyürek, S. (2004) The politics of identity in the Turkish Cypriot community and the language question. *International Journal of the Sociology of Language, 168:* 37–54. https://doi.org/10.1515/ijsl.2004.032

Kizilyürek, N. (2003) The politics of identity in the Turkish Cypriot community: a response to the politics of denial? *Méditerranée: Ruptures et Continuités, 37:* 197–204. Available at www.persee.fr/doc/mom_1274-6525_2003_act_37_1_969 Accessed: 26-04-2020.

Lau, R. R. and Pomper, G. M. (2004) *Negative Campaigning: An Analysis of U.S. Senate Elections*. Oxford: Rowman & Littlefield Publishers, Inc.

Lau, R. R. and Redlawsk, D. P. (2006) *How Voters Decide: Information Processing During Election Campaigns*. Cambridge University Press.

Matlock, T. (2012) Framing political messages with grammar and metaphor: How something is said may be as important as what is said. *American Scientist, 100*(6): 478–483. https://doi.org/10.1511/2012.99.478

Mayring, P. (2004) Qualitative content analysis. In Flick, U., Von Kardoff, E. and Steinke, I. (eds.) *A Companion to Qualitative Research.* London: Sage. 266–269.

McNair, B. (2003) *An Introduction to Political Communication*. 3rd ed. London: Routledge.

Moorman, M. and Neijens, P. (2012) Political advertising. In Rodgeres, S. and Tharson, E. (eds.) *Advertising Theory*. New York: Routledge. 297–309.

Neuman, W. R., Marcus, G., Cigler, A. and MacKuen, M. (eds.) (2007) *The Affect Effect: Dynamics of Emotion in Political Thinking and Behavior.* University of Chicago Press.

O'Keefe, D. J. (2002) *Persuasion: Theory and Research.* London: Sage.

Prior, M. (2001) Weighted content analysis of political advertisements. *Political Communication, 18*(3): 335–345. https://doi.org/10.1080/10584600152400374

Rahn, W. M. and Hirshorn, R. M. (1999) Political advertising and public mood: A study of children's political orientation. *Political Communication, 16*(4): 387–407. https://doi.org/10.1080/105846099198550

Ravitch, S. M. and Carl, N. N. (2020) *Qualitative Research: Bridging the Conceptual, Theoretical, and Methodological.* Los Angeles: Sage.

Redlawsk, P. D. (ed.) (2006) *Feeling Politics: Emotions in Political Information Processing*. New York: Palgrave Macmillan.

Redlawsk, D. P. and Pierce, R. S. (2017) Emotions and voting. In Arzheimer, K., Evans, J. and Lewis-Beck, M. S. (eds.) *The Sage Handbook of Electoral Behaviour*. Los Angeles: Sage. 406–432.

Ridout, T. N. and Searles, K. (2011) It's my campaign I'll cry if I want to: How and when campaigns use emotional appeals. *Political Psychology, 32*(3): 439–458. https://doi.org/10.1111/j.1467-9221.2010.00819.x

Ridout, T. N. and Franz, M. M. (2011) *The Persuasive Power of Campaign Advertising*. Temple University Press.

Ryfe, D. M. (2001) History of political communication: An introduction. *Political Communication, 18*(4): 407–420. https://doi.org/10.1080/10584600152647119

Schreier, M. (2014) Qualitative content analysis. In Flick, U. (ed.) *The SAGE Handbook of Qualitative Data Analysis*. London: Sage. 170–183.

Schudson, M. (2001) Politics as cultural practice. *Political Communication, 18*(4): 421–431. https://doi.org/10.1080/10584600152647128

Schill, D. (2012) The visual image and the political image: A review of visual communication research in the field of political communication. *Review of Communication, 12*(2):118–142. https://doi.org/10.1080/15358593.2011.653504

Valentino, N. A., Brader, T., Groenendyk, E. W., Gregorowicz, K. and Hutchings, V. L. (2011) Election night's alright for fighting: The role of emotions in political participation. *The Journal of Politics, 73*(1): 156–170. https://doi.org/10.1017/s0022381610000939

Valentino, N. A., Hutchings, V. L. and Williams, D. (2004) The impact of political advertising on knowledge, Internet information seeking, and candidate preference. *Journal of Communication, 54*(2): 337–354. https://doi.org/10.1111/j.1460-2466.2004.tb02632.x

Vafeiadis, M., Li, R. and Shen, F. (2018) Narratives in political advertising: An analysis of the political advertisements in the 2014 midterm elections. *Journal of Broadcasting & Electronic Media, 62*(2): 354–370. https://doi.org/10.1080/08838151.2018.1451858

Weber, C. (2012) Emotions, campaigns, and political participation. *Political Research Quarterly, 66*(2): 414–428. https://doi.org/10.1177/1065912912449697

KIRYL KASCIAN AND VIKTOR DENISENKO*

Patterns of Emotional Displays in Campaign Messages during the 2019 European Parliamentary Election in Lithuania

Intersections.EEJSP
6(2): 40–60.
DOI: 10.17356/ieejsp.v6i2.657
http://intersections.tk.mta.hu

* [zibens@gmail.com] (International Centre for Ethnic and Linguistic Diversity Studies, Prague); [viktor.denisenko@lka.lt] (General Jonas Žemaitis Military Academy of Lithuania; Vilnius University)

Abstract

The 2019 European Parliament (EP) election in Lithuania was a second-order event significantly affected by domestic political developments and agendas. As with all previous EP elections, it attracted a minimal level of public attention in Lithuania, creating challenges and opportunities for Lithuanian political groups to effectively reach their electorates. This article focuses on the emotional display patterns of the campaign messages of political parties during the 2019 European Parliamentary campaign in Lithuania. To this end, it applies Lasswell's model of communication to assess printed media- and social-network-based campaign materials. Findings confirm that emotional messages dominated the communication of the political groups to their voters, and show the extremely broad spectrum of political messages that were used to arouse emotions. The study indicates that the concept of Europe remains distant and abstract to voters in Lithuania. Politicians' messages to voters overwhelmingly appealed to the European context when addressing domestic agendas, thereby exploiting the emotional aspects of domestic political discourses in Lithuania and the perception of the EU in the country. Finally, the study demonstrates that the personification of political strategies involving politicians' charisma, public image, and expressivity were key elements in terms of the election outcome.

Keywords: *Lithuania, elections, European parliament, emotions, political communication, leadership.*

1. Introduction

This article analyses the emotional display patterns of the campaign messages and general strategies used by political groups in their campaigns during the election to the 2019 European Parliament in Lithuania and, to this end, explores three hypotheses. First, that emotional messages significantly prevailed over reasoned statements in the political communication used by the parties, electoral committees, and coalitions during this election. Second, it adds evidence that the European Parliament elections are not only about Europe, since domestic political agendas dominated the former. Specifically, the electoral messages of the political groups used 'European' issues to address domestic topics by exploiting the electorate's emotions, such as fear, hope, and anxiety. Third, it seeks to prove that the emotional patterns associated with personalization strategies involving politicians' charisma and expressivity substantially decided the outcomes of the election and composition of the MEPs representing Lithuania.

Lithuania is a post-Soviet state with the advanced implementation of Western democratic standards and a high level of integration into Euro-Atlantic political alliances. In 2004, the country joined NATO and the European Union. Lithuania's spell as a democracy has thus been much shorter than that of the states of Western Europe, which makes its political system per se more vulnerable to different types of emotional manipulation, taking into account the extreme plurality of the country's political party system (Cabada et al., 2014: 81). Lithuanian voters 'are more likely to trust leaders and personalities instead of parties' (Unikaitė-Jakuntavičienė, 2019: 65), a fact that underscores the importance of the nature of the communication between politicians and their potential electorate.

The 2019 European Parliament election was the fourth of its kind in Lithuania since the country's accession to the EU in 2004. The process of the European Parliament elections in Lithuania is governed by the country's Law on Elections to the European Parliament (2003).[1] For the election, the entire territory of Lithuania constitutes one multiple mandate constituency. Moreover, Article 86 of the law establishes that a party or an electoral bloc is entitled to take part in the distribution of MEP mandates only if it receives at least five percent of the votes cast at the election.

On 26 May 2019, Lithuanians elected 11 MEPs to represent them in the 2019–2024 European Parliament legislature. At the 2014 election, the country's political parties also had 11 MEP seats at stake, while in 2004 and 2009 Lithuanians elected 13 and 12 MEPs, respectively. In all four European elections in Lithuania, political parties were able to obtain three or more seats only on four occasions.

[1] The official English translation of Law No. IX-183 on Elections to the European Parliament adopted on 20 November 2003, as amended, is available at https://e-seimas.lrs.lt/portal/legalAct/lt/TAD/TAIS.226195. Accessed: 29-03-2020.

The Labour Party collected five MEP mandates in 2004.[2] In 2009, the Social Democratic Party of Lithuania got three MEP mandates.[3] The Homeland Union – Lithuanian Christian Democrats received four MEP mandates in 2009[4] and three in 2019.[5] In other words, no political party in Lithuania is usually capable of securing more than one or two MEP mandates.

The 2019 European Parliament electoral campaign in Lithuania involved 301 candidates representing 16 different political groups, including ten political parties, five electoral committees, and one coalition.[6] Only seven political groups were able to reach the electoral threshold and receive MEP mandates. The following table provides an overview of the 2019 European election results in Lithuania:

Table 1: Result of the 2019 European Parliament election in Lithuania[7]

Political group	**Type**	**Number of votes**	**Percentage**	**Number of mandates**
Homeland Union – Lithuanian Christian Democrats	Political party	248,736	18.67	3
Social Democratic Party of Lithuania	Political party	200,105	15.02	2
Lithuanian Farmers and Greens Union	Political party	158,190	11.88	2
Labour Party	Political party	113,243	8.50	1

[2] 2004 m. birželio 13 d. rinkimai į Europos Parlamentą: Balsavimo rezultatai Lietuvoje (European Parliament election of 13 June 2004: Voting results in Lithuania). (2004) *Central Electoral Commission of the Republic of Lithuania.* June 18. Available at https://www.vrk.lt/statiniai/puslapiai/rinkimai/2004/euro/rezultatai/rez_l_18.htm. Accessed: 29-03-2020.

[3] 2009 m. birželio 7 d. rinkimai į Europos Parlamentą. Galutiniai rinkimų rezultatai: Išrinktų Europos Parlamento narių sąrašas (European Parliament election of 7 June 2009. Final election results: List of the elected MEPs) (2009) *Central Electoral Commission of the Republic of Lithuania.* June 14. Available at https://www.vrk.lt/statiniai/puslapiai/2009_ep_rinkimai/output_lt/rezultatai/index.html. Accessed: 29-03-2020.

[4] *Ibid.*

[5] 2019 m. gegužės 26 d. rinkimai į Europos Parlamentą: Išrinkti Europos Parlamento nariai (European Parliament election of 26 May 2019: Elected MEPs) (2019) *Central Electoral Commission of the Republic of Lithuania.* June 3. Available at https://www.vrk.lt/2019-europos-parlamento/rezultatai?srcUrl=/rinkimai/904/2/1548/rezultatai/lt/rezultataiEpIsrinktiNariai.html. Accessed: 29-03-2020.

[6] 2019 m. gegužės 26 d. rinkimai į Europos Parlamentą: Kandidatų į Europos Parlamento narius sąrašai (European Parliament election of 26 May 2019: Lists of the MEP candidates). (2019) *Central Electoral Commission of the Republic of Lithuania.* Available at https://www.vrk.lt/kandidatai-kandidatu-sarasai-2019-ep. Accessed: 29-03-2020.

[7] Source: 2019 m. gegužės 26 d. rinkimai į Europos Parlamentą: Balsavimo rezultatai Lietuvoje (European Parliament election of 26 May 2019: Voting results in Lithuania). (2019) *Central Electoral Commission of the Republic of Lithuania.* June 3. Available at https://www.vrk.lt/2019-europos-parlamento/rezultatai?srcUrl=/rinkimai/904/2/1548/rezultatai/lt/rezultataiEpDaugmVrt.html. Accessed: 29-03-2020.

Political group	Type	Number of votes	Percentage	Number of mandates
Liberals Movement of Lithuania	Political party	83,083	6.24	1
Train of Aušra Maldeikienė	Civil electoral committee	82,005	6.16	1
Block of Valdemar Tomaševski – Coalition of the Christian Families Alliance and the Russian Alliance	Coalition	69,347	5.21	1
Other parties and electoral committees	–	305,245	22.91	0
Invalid ballots	–	72,066	5.41	–
Total	–	1,332,020	100	11

2. *Data selection and research model*

Data selection was determined by the factors of time and content. The time factor limited the analyses of data to the period 6 April to 24 May 2019. This covers the 50-day period before the election when the most active electoral campaigning occurred. While the electoral campaign started earlier, the initial five days of the designated period signified the last week for political groups to collect voters' signatures and return the filled-in forms to the Central Electoral Commission of the Republic of Lithuania by 11 April, a date that marked the intensification of communication between the politicians and their electorates. The content factor consists of two elements. First, it involves an analysis of sponsored articles and political advertising in the main daily printed media in the Lithuanian (Kauno diena, *Lietuvos rytas*, *Vakaro žinios* and *Verslo žinios*), Russian (*Ekspress nedelia*, *Litovskij kurjer* and *Obzor*) and Polish (*Kurier Wileński*) languages. This combination represents an inclusive approach involving the main ethnic and linguistic groups that comprise Lithuania's population. The focus on printed media extends the analysis to all age groups within the country, since the older generation tends to use digital technologies to a limited extent. Second, the analysis included the electoral materials of the political groups and their representatives posted on Facebook, the most popular social network in Lithuania. This shows how political groups appeal to citizens active on social networks.

The information thus collected was processed according to Lasswell's 5W communication model, and seeks to cover the interaction between the communicators (the political group seeking MEP mandates at the 2019 European Parliament election in Lithuania) and their target audience (i.e. the electorate) through the formula 'Who (says) What (to) Whom (in) Which Channel (with) What Effect' (Wenxiu, 2015). All of the aforementioned materials and texts contain specific messages aimed at the electorate which are treated as units. These messages are embodied in electoral slogans or promises which stimulated

emotions among the potential electorate. The focus on electoral slogans, promises, and statements is also justified by the visibility of these messages to potential voters. Slogans, promises, and statements are typically an integral part of the advertising materials of political groups as key political figures are included on the electoral lists of the participating political parties, coalitions and civil electoral committees visible to the wider public. For the purposes of this research, we disregard quantitative factors such as the number of publications/posts or affective words, as there is no direct link between these figures and the electoral performance of specified political groups. Instead, qualitative content analysis was used to assess the emotional context of the selected messages. Since an election involves communication between a political group and its potential voters, the analysis of the selected electoral content had two purposes, in line with Lasswell's 5W model. First, the agendas addressed by the political groups were analyzed to show the emotional patterns of the messages transmitted from the political group to its electorate. This clarifies the linkage between *what* is said and its *effect* on the target audience. Second, the personal factors, charisma, and expressivity of the representatives of the political groups were analyzed. This revealed the impact patterns of the emotional content of the messages to assess the connection between their *effect* on the audience and the personalities *who* delivered these messages.

Before this analysis, an alignment of some remarks pertinent to the emotional patterns of the electoral campaigns and the context of the 2019 European Parliament election in Lithuania is necessary.

3. Emotional displays in campaign messages

Emotions 'provide a sense of meaning for life and aid humans in interpreting their surroundings and navigate the environment' (Yates, 2019: 4–5). Casting ballots at an election is natural behavior for many people since participation in a voting process is a matter of habits absorbed in a similar way as other rules of social conduct (Marcus, 2002: 91). Elections are always linked to emotional aspects. Being 'affective states that are more precisely labeled, such as anger, hatred, fear, love, and respect' (Cottam et al., 2016: 63), emotions *per se* are complex. They are also integral elements of the reasoning process (Bandes, 2013: 192). They include a spectrum of emotions, including ones that help people to 'recruit reason and disable habit' (Marcus, 2002: 116). Thus, emotions trigger political changes in general and thereby form a crucial element of the electoral process.

Some authors identify political campaigns as 'the marketplace of emotions' (Yates, 2019: 3), the latter which range from anxiety to complacence (Marcus, 2002: 106). Emotions are 'an antecedent to involvement, and in the context of voting and politics, voters' emotional state will influence their overall involvement in politics' (O'cass, 2002: 65). As Castells (2011: 148) demonstrates, this process runs in two ways, ranging from loyalty to political groups 'based on an attachment to leaders,' to their critical assessment 'based on rational calculations influenced by heightened anxiety.' This framework implies a reciprocal connection between

political groups and their electorate. The electorate's stance vis-à-vis its electoral choices involves factors such as rationality and available information. The crucial role of information suggests that the more people are informed, the 'more emotional about politics and more swayed by those emotions in their behavior' they are (Miller, 2011: 576). Emotions determine electoral choices because they make them rational (Marcus, 2002: 7). Success in any political campaign is determined by a series of factors that include 'voters' involvement in politics, their corresponding level of satisfaction with politics, and their emotional state' (O'cass, 2002: 65). As Weber (2013) demonstrates, the role of emotions is also crucial in the interpretation of electoral performances, as campaign messages invoke emotions among their recipients (i.e. the electorate) and these emotions trigger important political consequences depending on their specifics.

Each electoral campaign differs from its predecessors and successors in terms of some short-term factors which can involve the reputation and popularity of candidates, as well as other relevant domestic and foreign policy issues. Moreover, these factors may significantly distort the electorate's typical preferences for specific political groups compared to previous electoral campaigns (Yates, 2019: 2). Lithuania is no exception to this trend, though it has its specifics. The results of the 2019 election confirm the plurality of the country's political system, as in the last decade the winners of Seimas[8] or European Parliament elections typically claimed around 20 percent of the votes. Indeed, the 26.16 percent received by the Homeland Union – Lithuanian Christian Democrats at the 2009 European Parliament election is rather an exceptional result in the Lithuanian context.[9] Taking into account the relatively small number of MEP seats reserved for Lithuania, four issues should be emphasized.

First, electoral campaign theorists define the elections for the European Parliament as second-order ones (Reif and Schmitt, 1980; Norris and Reif, 1997; Willermain, 2014). The European Parliament elections do not result in the filling of positions at major political offices by the representatives of the political groups who win the elections. The European elections are usually subject to the least level of political emotions and media attention in Lithuania. They are essentially not about Europe, but domestic political discourses and agendas in EU Member States (Hix and Marsh, 2011). Therefore, domestic political processes in Lithuania played an essential role in influencing the outcomes of the 2004 and 2009 European Parliament elections in Lithuania (Matonytė, 2016: 547). This observation also applies to the 2014 and 2019 European elections.

Second, the 2019 European Parliament election took place on 26 May 2016, on the same day as the second round of the 2019 presidential election in Lithuania. The 2019 European election was thus overshadowed by the presidential campaign

[8] Seimas is the name of the national parliament of Lithuania.

[9] 2009 m. birželio 7 d. rinkimai į Europos Parlamentą. Balsavimo rezultatai Lietuvoje (European Parliament election of 7 June 2009. Voting results in Lithuania) (2009) *Central Electoral Commission of the Republic of Lithuania.* June 14. Available at https://www.vrk.lt/statiniai/puslapiai/2009_ep_rinkimai/output_lt/rezultatai_daugiamand_apygardose/rezultatai_daugiamand_apygardose1turas.html. Accessed: 29-03-2020.

in Lithuania. Despite this, the presidential election substantially increased voter turnout at the European election to 53.48 per cent.[10] Taking into account the generally tough competition among the political groups at the European elections in Lithuania, this means that the ability of the main political actors in Lithuania to use their personal charisma and emotions was one of the decisive factors in attracting voters and mobilizing the electorate.

Third, the electoral system of Lithuania could be described as personalistic (Pettai, 2005: 467; Unikaitė-Jakuntavičienė, 2019: 73). The naming of a substantial number of civil electoral committees and coalitions after their political leaders is common practice in elections at various levels in Lithuania. At the 2019 European Parliament election, four competing political groups were named after their leaders, including three civil electoral committees and one coalition. In the 2019 European election, Aušra Maldeikienė and Valdemar Tomaševski secured the only MEP seats their political groups were able to claim. This means that the European Parliament election can also be regarded as a vote of confidence in the leaders of these 'personalistic' political groups.

Fourth, Lithuania has its specifics when it comes to the notion of populism and its use in political campaigns. In contrast to Western Europe, populism in Lithuania is 'a style of political communication seeking to raise interest in some political issues, to increase political participation, especially participation in political elections' (Aleknonis and Matkevičienė, 2016: 44). Some 'political actors can be more or less populist at certain times,' while their style of political communication 'can generate, affect and interact with content in quite complex ways, particularly when it comes to the mobilization of passions' (Moffitt, 2019). Thus, populism in Lithuania is not rooted in the ideas of specific political groups, but is merely based on the contexts and emotions of political communication within Lithuanian society.

Mobilization of the electorate can be achieved through communication with people when politicians appeal to voters' emotions, which make individuals think and decide.

4. Agendas addressed by political groups

The first part of the analysis based on the selected data focuses on the link between *what* is transmitted to the Lithuanian electorate and the *effect* of this. The patterns embodied in these messages are illustrated through the electoral slogans and promises that stimulated emotions among the potential electorate. The 2019 European election in Lithuania was quite characteristic in this regard.

Most of the political groups used slogans during the pre-election period. This approach was chosen by 12 out of 17 political groups. Analysis of these

[10] 2019 m. gegužės 26 d. rinkimai į Europos Parlamentą: Balsavimo rezultatai Lietuvoje (European Parliament election of 26 May 2019: Voting results in Lithuania). (2019) *Central Electoral Commission of the Republic of Lithuania.* June 3. Available at https://www.vrk.lt/2019-europos-parlamento/rezultatai?srcUrl=/rinkimai/904/2/1548/rezultatai/lt/rezultataiEpDaugmVrt.html. Accessed: 29-03-2020.

slogans suggests focusing on the specific narratives used by political parties, coalitions, and electoral committees to attract potential voters, which merely resembled a market place. All slogans are presented in the following table:

Table 2: Slogans of the political groups at the 2019 European Parliament election in Lithuania[11]

Political group	**Slogan**
Homeland Union – Lithuanian Christian Democrats	We believe in Europe (*Tikime Europa*)
Lithuanian Farmers and Greens Union	Lithuania in Europe: Let's not stop growing! (*Lietuva Europoje: nesustokime augti!*)
Labour Party	I take responsibility for my words! (*Atsakau už savo žodžius!*)
Train of Aušra Maldeikienė	More Europe in a Western-like Lithuania *(Daugiau Europos vakarietiškoje Lietuvoje)*
Block of Valdemar Tomaševski – Coalition of the Christian Families Alliance and the Russian Alliance	For a Europe based on the Christian values! For a Europe of Nations! (*Už Europą, grindžiamą krikščioniškomis vertybėmis! Už Tautų Europą!*)
Social Democratic Labour Party of Lithuania	We are going to represent Lithuania! (*Einame atstovauti Lietuvai*)
Lithuanian Green Party	Let's restore the European dream! (*Atkurkime europietiškąją svajonę!*)
Crucial Jump	When others offer a crawl, we offer a jump! *(Kol kiti siūlo šliaužti, mes siūlome šuolį!*)
Lithuanian Centre Party	Together with the EU in the name of a prospering Lithuania! *(Kartu su ES vardan klestinčios Lietuvos!*)
Order and Justice	A strong family – a secure community – in the Europe of Nations (*Stipri šeima – saugi bendruomenė – Tautų Europoje*)
Lithuanian Freedom Union (Liberals)	Stronger, Lithuania – Stronger European Union! Go Forward, Lithuania! (*Stipryn, Lietuva – stipryn, Europos Sąjunga! Go Forward, Lithuania!*)
Vytautas Radžvilas: Let's reclaim the state!	Let's defend Europe! Let's reclaim the state! (*Apginkime Europą! Susigrąžinkime valstybę!*)

The slogans demonstrate various types of agendas offered to the Lithuanian electorate. An appeal only to the 'European' agenda was rather an exception at this election, as this was observed only in the slogan 'We believe in Europe' (Lithuanian: *Tikime Europa*) used by the Homeland Union – Lithuanian Christian Democrats, the party which came first in the election. Being itself pro-European, this party delivered an emotionally understandable slogan to its loyal electorate.

[11] Source: Rinkimai į Europos Parlamentą 2019 m. gegužės 26 d. (European Parliament election of 26 May 2019). (2019) *Central Electoral Commission of the Republic of Lithuania.* Available at https://www.vrk.lt/documents/10180/676652/EP+bendras+leidinys++A5+2019.pdf/36efb36d-7f88-479e-855a-666c4060b322. Accessed: 29-03-2020.

The main trend among the agendas offered by the political parties involved mention of both domestic and European agendas, as this was connected with a vision of Lithuania within the European Union and its policies. In all cases, the EU was presented positively as a guarantor of Lithuania's brighter future. EU membership was presented as a crucial element of Lithuania's prosperity, strength, and growth.

Some slogans represented a palette of mostly so-called 'traditional' values. Thus, the Order and Justice party appealed a desire for 'strong families.' This same party, as well as the Block of Valdemar Tomaševski – Coalition of the Christian Families Alliance, and the Russian Alliance, were the only two political groups that eloquently supported the concept of a 'Europe of Nations' by incorporating this concept into their political slogans. This approach corresponded to the fear of political groups and their electorates of Europe as a tool for geopolitical homogenization. In their slogans, the former tried to find a balance by not denying the idea of a united Europe. Their appeal was directly focused on the emotions of those who support the idea of a strong nation-state, and so-called 'traditional values.' These two parties demonstrated their opposition to the mainstream idea of Europe that they largely equated with domination of the development path of the country (Bechter, 2019: 4). Instead, the party campaigns focused on the important role of Member States and demanded more sovereignty for them at all political levels within a united Europe, thereby appealing to a soft version of Euroscepticism (Taggart and Szcerbiak, 2008: 8). These agendas were anything but new for these political groups. In the 2014–2019 European Parliament, MEPs from these two parties belonged to the two different Eurosceptic political groups. In 2014–15, Rolandas Paksas and Valentinas Mazuronis (elected from the Order and Justice list) were members of the Europe of Freedom and Direct Democracy political group, while Valdemar Tomaševski was a part of the club of the European Conservatives and Reformists for the entire eighth EP legislative period.

Another Eurosceptic political group competing at the 2019 European Parliament election in Lithuania was the civil electoral committee 'Vytautas Radžvilas: Let's reclaim the state!' The committee's name and electoral slogan remind one of the motto of Brexit supporters who emphasized the need to take back control over the major functions of the state from Brussels. This appeal corresponded to patterns of reactionary politics which seek to return a country to some point in the past by 'adopt[ing] a back-route outlook for the present' (Capelos and Katsanidou, 2018: 1273). Radžvilas and his supporters argued that major functions should be brought back from the European to the national level, and promoted their vision as a way to 'defend Europe.' The emotional content of the slogan 'reclaim the state!' is linked with the political myth of a Golden Age (Girardet, 2007) that this political group promised to bring back. In the eyes of voters, it portrayed Lithuania's EU membership as a case of loss of control by the state, and denounced the advantages the country and its citizens had gained from it.

Some slogans appealed to more abstract or universal discourse. For instance, the civil electoral committee Crucial Jump tried to emphasize its difference from

other political groups by using the slogan 'When others offer a crawl, we offer a jump!' The most distinctive characteristic of this political group was its attempt to appeal to the electorate's negative emotions about other (predominantly mainstream) political parties. Crucial Jump tried to position itself as a dashing political power. Its slogan was designed to attract voters with the promise of immediate results, referring to the words 'jump' and 'crawl' which qualitatively distinguished the tempo of progress or movement. However, this appeal to its unique nature among other political groups was not enough to win MEP seats.

The slogans cannot *per se* represent the full spectrum of pre-electoral narratives used in the 2019 European election in Lithuania. However, the main ideas and promises presented in the slogans reveal the positions of these political groups on the electoral map of Lithuania. To get an in-depth picture of the positions of the major political actors in Lithuania at this election, one should review the slogans in conjunction with the promises and statements the political groups used in their campaigns.

The posters of the Labour Party included three interconnected promises: 'For an equal minimum wage in the EU of at least at 700 EUR!', 'For investments and well-paid workplaces in Lithuania's regions!' and 'For equal social guarantees for all the people in the EU!'[12] These promises can be interpreted as focusing on the domestic audience. The appeal to the EU signifies the focus on the feelings of inequality of Lithuania's citizens vis-à-vis the common European context. These messages are also directly connected with the emotional perception of Lithuania's political reality. For Lithuanians, the European Union is first of all a symbol of social and financial welfare. Freedom of movement and financial support for various EU-funded projects are the most appreciated advantages of the country's membership in the Union. Social inequality between Lithuania and the 'old' EU Member States is also a popular topic of public discussion, as is broader discourse about social (in)equality in Lithuania. The Labour Party promises of social wealth and equality appealed to voters' emotions and tried to match their expectations about the EU.

The rhetoric used by the Block of Valdemar Tomaševski – Coalition of the Christian Families Alliance and the Russian Alliance in its advertising campaign also clearly demonstrated the pre-electoral position of this political group. It promised to 'strengthen the foundations of Europe's Christian civilization' through 'respect for human life from birth until death.' This political group emphasized its readiness to 'defend the principles of freedom, solidarity, and equality of all people before the law.' An important part of its rhetoric was an appeal to conservative values that coincide with an emotionally strong fear of a very secular and liberal Europe. Specifically, Tomaševski's electoral block promised to respect traditions, sovereignty, and the national identity of Europe's nations and seek recognition of the family (understood as union between a man and a woman) as the 'core of

[12] Už vienodą minimalų atlyginimą Europos Sąjungoje – jis turi siekti mažiausiai 700 eurų! (For an equal minimum wage in the European Union - it must be at least 700 euros!) (2019) *Labour Party YouTube channel*. May 13. Available at https://www.youtube.com/watch?v=a7kB9_Tbb8k. Accessed: 29-03-2020.

society.' An essential element of the coalition's rhetoric was the appeal to the rights of Lithuania's national minorities, which is quite logical. First, the coalition represents a political alliance between two parties, the *Electoral Action of Poles in Lithuania – Christian Families Alliance (EAPL-CFA),* and the *Russian Alliance,* thereby claiming to represent Lithuania's two biggest national minorities. Second, its electorate almost entirely consists of Lithuania's Polish, Russian, Belarusian, and other national minorities. Thus, the coalition declared its intention to combat all forms of discrimination against national minorities in various domains (including education) that arise from differences on the grounds of language, culture, and religion. The coalition declared the need to maintain good relations with all Lithuania's neighbors, including Russia and Belarus. The entire frame of the coalition's rhetoric was portrayed as the party being the core of 'a new reformed European Union.'[13] The emotional aspect of Tomaševski's electoral campaign was two-fold. First, minority issues and specifically the situation of the Polish minority are emotional topics in Lithuanian political discourse. The *EAPL-CFA* has for a long time been *a* niche political party (Janušauskienė, 2016: 582) that has effectively appealed to the fears and anxieties of a minority electorate in a situation in which Lithuanian mainstream parties have largely ignored the needs and demands of the country's national minorities (Denisenko, 2018). Second, following a series of internal scandals associated with Lithuania's Polish minority in 2018, and the relative setback of EAPL-CFA and the Russian Alliance at the municipal election in March 2019, the minority coalition's main goal was to convince its potential electorate to come to the ballot box and cast their votes for them.

However, the most doubtful messages could be found on the billboards of the Lithuanian Farmers and Greens Union, Lithuania's ruling party. This political group wanted to remind people that it was them who had 'started paying "child money" – 50 EUR for every kid.'[14] This was a clear appeal to domestic policies without any connection to European agendas whatsoever. Similarly, it is hard to specify how the slogan 'Culture is the face of the nation' printed on the posters of a candidate, Jolanta Šmidtienė, was linked to the EU context.[15] Culture forms an important domain of EU policies. However, any attempt to justify the connection of these policies to the said slogan would merely be speculative.

One of the most interesting examples was the electoral messages of the Movement of President Rolandas Paksas. One of the campaign slogans this group used was 'There will be no negotiations with globalists!'[16] Use of this approach is a

[13] Rinkimai į Europos Parlamentą 2019 m. gegužės 26 d. (European Parliament election of 26 May 2019). (2019) *Central Electoral Commission of the Republic of Lithuania.* Available at https://www.vrk.lt/documents/10180/676652/EP+bendras+leidinys++A5+2019.pdf/36efb36d-7f88-479e-855a-666c4060b322. Accessed: 29-03-2020.

[14] See Lithuanian Farmers and Greens Union Facebook page (post of 21 May 2019), available at https://www.facebook.com/gandrai/photos/a.194532843979866/1815378095228658/. Accessed: 29-03-2020.

[15] See Facebook post of 14 May 2019, available at https://www.facebook.com/vaida.pranarauskaite/posts/2316629158383445. Accessed: 29-03-2020.

[16] See Rolandas Paksas's Facebook page (post of 8 May 2019), available at

populist technique that appeals to the emotions of those parts of the electorate who do not back the intensive integration processes within the EU which lean towards a more federalized Europe. Paksas attempted to address fears about Lithuania's allegedly disadvantaged position in a global world, believing that this would be a strong emotional argument attractive to the population of a small state.

The majority of the electoral messages were dominated by domestic agendas, even if they were located in the European context. This strategy allowed politicians to appeal to the electorate's emotions in a more focused way, as domestic issues are closely linked with people's fears, anxieties, and insecurity. Put in the European context, these strategies attempted to trigger voters to assess the contrast, embrace the electoral message, and vote for this political group.

5. Personal factors, charisma, and emotional display

The second dimension of the analysis of the selected data involved the personal factors, charisma, and expressivity of the key figures in the political groups involved in the 2019 European Parliament election. This part of the analysis highlights the emotional patterns of the electoral messages to identify the linkage between the individuals *who* (political figures) delivered (or were used to deliver) them and their *effect*. These patterns proved to be an important element of the campaign in terms of triggering the electorate's emotions.

As mentioned above, Lithuania has only 11 MEP seats. This shows that even the strongest and most popular political powers are typically capable of obtaining just one or two MEP mandates. Any European Parliament election in Lithuania is thus merely a struggle between personalities, rather than between political groups. This not only confirms observations about Lithuania's political system as quite personalized and extremely fragmented, but also shows the strategies used to select the top candidates.

Within the context of this election, some political groups could be called one-person movements. The list of these groups includes the Train of Aušra Maldeikienė, the Block of Valdemar Tomaševski – Coalition of the Christian Families Alliance combined with the Russian Alliance, Vytautas Radžvilas: Let's reclaim the state! and the Movement of President Rolandas Paksas. Because of the relatively small number of MEP seats allocated to Lithuania, this situation had two effects. On the one hand, it put these politicians in a more advantageous position compared to other persons on the political list, as potential voters implicitly tended to support the leader of the respective political groups in preferential voting. On the other hand, if the political groups met the electoral threshold, it is highly likely that their leaders would have received an MEP mandate.

Vytautas Radžvilas is a well-known former professor of Vilnius University. He advocates national-centrist views in the public sphere. Although he could not be described as an openly anti-European politician, his views quite comfortably fit

https://www.facebook.com/rolandas.paksas/photos/a.191726567666578/1199673956871829/. Accessed: 29-03-2020.

within the framework of soft Euroscepticism, as he advocates a strong national identity within the EU and a lower level of integration of states. Radžvilas has a circle of supporters, but not enough to gain popularity at the national level. Lithuanian society is the most Eurooptimistic within the entire Union,[17] and hard Eurosceptic views have remained on the margins of Lithuania's politics since the country obtained EU membership (Unikaitė-Jakuntavičienė, 2014: 2). Neither the political discourse he offered nor his personal charisma were sufficiently attractive to voters to help him to get an MEP mandate.

In contrast to Radžvilas, Aušra Maldeikienė managed to win benefits from her personal charisma and political position to claim the only MEP seat in her electoral committee. A professor of economics, Maldeikienė has been well known for her very critical and sometimes even unexpected views on political and economic developments in the country. Since 2015, she has been active in political life and the media space. Maldeikienė was a member of Vilnius municipal council, and in 2016 was elected to the Seimas as an independent candidate. In 2018, she announced her intention to become a candidate at the 2019 presidential election, but in February 2019 withdrew from the campaign. During the 2019 European Parliament campaign, Maldeikienė and her electoral committee made an appeal based on the advantages of Lithuania's EU membership, seeing it as a guarantee of the country's prosperity. Moreover, this political group argued for a stronger focus on fundamental values, including freedom, equality, and justice.[18] It seems that the content of Maldeikienė's electoral message were secondary because her electoral committee did not receive more than one MEP mandate, and other members on its electoral list acted as the crowd. In any case, Maldeikienė's active participation in Lithuania's domestic politics allowed her to be visible in the public sphere and attract a sufficient number of votes to be elected as an MEP.

The case of Valdemar Tomaševski is rather special among all the MEPs that have been elected in Lithuania. He remains the only MEP from Lithuania to represent a national minority coalition (consisting in this case of the Electoral Action of Poles in Lithuania – Christian Families Alliance, and its minor partner, the Russian Alliance). Tomaševski's rhetoric has always been significantly focused on the specifics of his electorate, which almost entirely consists of representatives of Lithuania's Polish, Russian, Belarusian, and other national minorities. Moreover, he advocated good relations with Belarus and Russia. In the context of this electoral campaign, it is not possible to talk about the effectiveness of the rhetoric of the coalition led by Tomaševski, but rather about his personal success. Because of the country's ethnic composition, Lithuania's Polish-Russian minority electoral alliance could hardly claim more than one MEP seat, and it was Tomaševski who

[17] Lithuanians most optimistic about EU. (2019) *Delfi.en.* August 8. Available at https://en.delfi.lt/politics/lithuanians-most-optimistic-about-eu.d?id=81937125. Accessed: 29-03-2020.
[18] Viskas apie Europos Parlamento rinkimus ir Aušros Maldeikienės traukinį vienoje vietoje (Everything about the European Parliament election and the Train of Aušra Maldeikienė in one place). (2019) *Aušra Maldeikienė's website.* May 19. Available at http://www.maldeikiene.lt/viskas-apie-europos-parlamento-rinkimus-ir-ausros-maldeikienes-traukini-vienoje-vietoje/. Accessed: 29-03-2020.

was the most recognizable political figure among the representatives of this coalition (Bobryk, 2013: 357; Csergő and Regelmann, 2017: 304). The 2018 internal conflicts within Lithuania's Polish minority in 2018 (Knutowicz, 2018) and the relatively weak performance of the Polish-Russian minority coalition at the municipal election in March 2019 in Lithuania (Kascian, 2019) put the contents of Tomaševski's campaign into a somewhat different light. Having a stable electorate in the minority-populated small towns and rural areas of the Šalčininkai and Vilnius districts, the Polish-Russian electoral coalition is heavily dependent on the votes of urban Poles, Russians, and representatives of other minorities living in the cities of Vilnius and Klaipėda (ibid.). The narrow success of Tomaševski's electoral coalition revealed the structural problems with this political group. It also showed its capacity to effectively mobilize the electorate, which proved to be sufficient to meet the five-percent electoral threshold. In any case, the 2019 European Parliament election appeared as merely a vote of confidence in Tomaševski, which he barely passed. In other words, the main emotional message of the coalition led by Tomaševski extended beyond the party's electoral promises, as it concerned whether the Lithuanian Poles (and other minorities) would again have their own MEP.

Personal charisma was used also by Viktor Uspaskich and Rolandas Paksas, the two politicians typically mentioned as being among the most prominent populist- (Aleknonis and Matkevičienė, 2016: 29, 37) and charismatic (Kavaliauskaitė, 2014a: 149) politicians in Lithuania.

Viktor Uspaskich is a Russian-born[19] leader of the Labour Party, which is seen as a 'model example of left-winged [sic] populism' (Aleknonis and Matkevičienė, 2016: 37) in Lithuania. Its successful performances at various elections have been substantially connected with the personal charisma and popularity of Uspaskich as a political leader (Kavaliauskaitė, 2014b: 126). The party is predominantly supported by 'younger, less educated, blue-collar or unemployed [people] living predominantly in provincial towns and the countryside' (Jurkynas 2014: 336). Moreover, a significant part of Lithuania's Russian minority votes for the Labour Party, as leftist national parties enjoy considerable popularity among the representatives of this national minority (Csergő and Regelmann, 2017: 304–305; Duvold and Jurkynas, 2013: 148–149; Lauristin et al., 2011: 135). At the 2019 EP election, the personality of Uspaskich was embodied in the Labour Party's electoral slogan 'I take responsibility for my words!' (Lithuanian: *Atsakau už savo žodžius!*). The distinctiveness of this slogan among those of other political groups involves two factors. First, it resembles a phrase used in the Russian-speaking semi-criminal argot, whereby the phrase 'take responsibility for your own words' literally means 'keep your promises.' This could hardly be viewed as a linguistic coincidence, since the party's leader Viktor Uspaskich established his business in Lithuania in the 1990s when the success of commercial projects was significantly linked with criminal or semi-criminal activities. Second, it was the only slogan at

[19] Interestingly, Uspaskich never specified his ethnic belonging (Lithuanian: *tautybė*) in his candidate profile at the 2009, 2014, and 2019 European Parliament elections.

the 2019 European election in Lithuania which used a personalized grammatical construct, meaning its leader 'spoke' directly to the potential electorate on behalf of the entire party. Consequently, Viktor Uspaskich was re-elected to his third MEP term, being the only Labour Party representative who received a mandate.

Rolandas Paksas failed to be re-elected after two consecutive terms as an MEP. This politician has a controversial image in Lithuania, and for a long time has been seen as the most prominent example of a right-wing populist within the country's political landscape (Aleknonis and Matkevičienė, 2016: 38). Paksas is the former leader of the Order and Justice party, and was the country's president in 2003–2004. However, one year after obtaining the highest political post in Lithuania he had to step down as a result of impeachment. Following this, Paksas was barred from the opportunity of taking up any elected or appointed political position in Lithuania. Work in the European Parliament became the only way for him to remain in the top flight of Lithuania's politics. Like all other former presidents of Lithuania, Paksas retained the privilege of being officially permitted to use the word 'president' in conjunction with his name and surname. At the 2019 European Parliament election, he used this opportunity and called his civil electoral committee the Movement of President Rolandas Paksas. Before the election, Paksas was very optimistic about his prospects of being re-elected for another term as MEP.[20] However, the results of the election were a fiasco for former Lithuania's president. The lack of any MEP mandates for his electoral committee also meant that Paksas would no longer have any significant political weight in the country's public life. The reasons for Paksas's failure are twofold. First, his decision to leave the Order and Justice party and run for the European Parliament election independently did not bring him any political benefits. Second, it is possible to agree with the assessment made by a Lithuanian political scientist, Ainė Ramonaitė, who argued that if the results of the Order and Justice and Movement of President Rolandas Paksas parties were combined, they would still not receive an MEP mandate.[21]

Personification is nothing new in the tactics of different political groups involved in the European Parliament elections in Lithuania. For example, during the 2009 European Parliament election, the Liberals Movement of Lithuania invited a well-known professor, Leonidas Donskis (1962–2016),[22] to lead its electoral list. Donskis was elected without even being a member of this political party, and worked as an MEP from 2009 to 2014.

[20] Rolandas Paksas neabejoja: jis bus trečiąkart išrinktas į Europos Parlamentą (Rolandas Paksas has no doubts that he will be elected to the European Parliament for the third time). (2019) *Lietuvos Rytas*. May 26. Available at https://www.lrytas.lt/lietuvosdiena/aktualijos/2019/05/26/news/rolandas-paksas-neabejoja-jis-bus-treciakart-isrinktas-i-europos-parlamenta-10501634/. Accessed: 29-03.2020.

[21] Paskelbti LR Prezidento ir Europos Parlamento rinkimų rezultatai (Results of the Lithuanian presidential election and the European Parliament election have been announced). 2019. *Bernardinai.lt*. May 27. Available at http://www.bernardinai.lt/straipsnis/2019-05-26-paskelbti-prezidento-ir-europos-parlamento-rinkimu-rezultatai/175982. Accessed: 29-03-2020.

[22] Leonidas Donskis Dead at Age 54. (2016) *Jewish Community of Lithuania*. September 27. Available at https://www.lzb.lt/en/2016/09/27/leonidas-donskis-dead-at-age-54/. Accessed: 29-03-2020.

Other political groups also turned to well-known public figures to attract voters, appealing to the positive image of these persons among the Lithuanian electorate. At the 2019 EP election, the ruling party Lithuanian Farmers and Greens Union invited Šarūnas Marčiulionis, one of the most prominent Lithuanian basketball players of all time, to join its electoral list. Basketball is extremely popular in Lithuania, and is considered a 'national sport,' thus famous basketball players are real celebrities. Marčiulionis placed second just after MEP Bronis Ropė, and obtained a seat in the European Parliament. Subsequently, Marčiulionis refused to take up an MEP position, being replaced by Stasys Jakeliūnas who came third in preferential voting.[23]

Similar tactics were used by the Homeland Union – Lithuanian Christian Democrats party, who placed professor Liudas Mažylis at the top of their electoral list.[24] He became famous in 2017 when he found the original of the 1918 Act of Independence of Lithuania while working at the German Federal Foreign Office Political Archive in Berlin.[25] The original document had been lost after Lithuania was occupied by the Soviet Union in 1940. After this finding, Mažylis was often invited to be a guest by various Lithuanian media.

All this demonstrates that the 2019 European Parliament electoral campaign in Lithuania was not about specific policies, but merely about publicity and appeals to voters' emotions through electoral messages and the involvement of well-known people who sometimes lacked any political experience whatsoever. The appeals to voters' emotions, linked to the public image of the personalities contained on the electoral lists of the political groups, as well as their charisma and expressivity, were often decisive factors that predetermined the outcome of the 2019 EP election in Lithuania.

[23] 2019 m. gegužės 26 d. rinkimai į Europos Parlamentą Puslapis atnaujintas: Lietuvos valstiečių ir žaliųjų sąjunga (European Parliament election of 26 May 2019: Lithuanian Farmers and Greens Union). (2019) *Central Electoral Commission of the Republic of Lithuania.* June 3. Available at https://www.vrk.lt/2019-europos-parlamento/rezultatai?srcUrl=/rinkimai/904/2/1548/rezultatai/lt/rezultataiEpDaugmPartPirmVrt_rorgId-28038.html. Accessed: 29-03-2020.

[24] 2019 m. gegužės 26 d. rinkimai į Europos Parlamentą Puslapis atnaujintas: Tėvynės sąjunga - Lietuvos krikščionys demokratai (European Parliament election of 26 May 2019: Homeland Union – Lithuanian Christian Democrats). (2019) *Central Electoral Commission of the Republic of Lithuania.* June 3. Available at https://www.vrk.lt/2019-europos-parlamento/rezultatai?srcUrl=/rinkimai/904/2/1548/rezultatai/lt/rezultataiEpDaugmPartPirmVrt_rorgId-28086.html. Accessed: 29-03'2020.

[25] Istorinį dokumentą suradęs Liudas Mažylis: „Apėmė pergalės jausmas" (Liudas Mažylis, finder of the historical document: 'the feeling of victory') (2017) *Lietuvos Rytas.* March 29. Available at https://www.lrytas.lt/lietuvosdiena/aktualijos/2017/03/29/news/istorini-dokumenta-surades-liudas-mazylis-apeme-pergales-jausmas--564061/. Accessed: 29-03-2020.

6. Conclusions

The 2019 European Parliament election in Lithuania can be viewed as a specific type of political campaign. This election was not very attractive to voters and the media, if compared to the presidential election, elections to the Seimas, or to the municipal councils. Lithuania has only 11 seats in the European Parliament, while the country's political system is extremely pluralistic.

The article has demonstrated the crucial role of political communication in this situation. As with any other election, the 2019 European Parliament election was closely linked with emotional factors that had an impact on the behavior of politicians and political groups during the campaign, as they demonstrated strategies typically used to attract the attention of potential voters and gain their support.

The findings reveal that the concept of Europe remains distant and abstract for voters in Lithuania, although Lithuanian society demonstrates one of the highest levels of Eurooptimism among all the EU Member States. This contradiction explains why most political groups avoided focusing on purely European discourse in their electoral messages during the 2019 European Parliament electoral campaign. Their main messages were either mixed (predominantly appealing to the European context when addressing domestic topics) or focused only on domestic issues. Promoting strong domestic agendas in European Parliamentary elections has been a political tradition in Lithuania since the very first election that took place in 2004.

The specificity of the European elections is embodied in the relatively small number of MEP seats allocated to Lithuania, and the ability of the main political groups to obtain one or two mandates resulted in competition not between political parties but merely between personalities. As this text has demonstrated, there is an ongoing trend towards the use of the names of political leaders in the names of electoral committees and coalitions. In other words, electoral committees and coalitions are becoming personalized electoral platforms for different political leaders. In the context of the European Parliament election in Lithuania, this could be equated to one-person movements.

Another typical strategy, as shown in the article, was the decision of the leadership of the mainstream parties to invite prominent personalities to join their electoral lists. Such figures included well-known intellectuals such as Liudas Mažylis on the electoral list of the Homeland Union – Lithuanian Christian Democrats, and sports celebrities like Šarūnas Marčiulionis on the list of the Lithuanian Farmers and Greens Union.

The 2019 European Parliament election in Lithuania was also associated with emotional messages. Some of the politicians tried to play with so-called 'traditional values.' For instance, Valdemar Tomaševski focused on the concept of the 'traditional family,' while Vytautas Radžvylas appealed to voters looking for a stronger national identity in Europe. The cases of Viktor Uspaskich and Aušra Maldeikienė showed that the use of personal charisma was quite an effective tool for obtaining sufficient electoral support to receive an MEP mandate. The example

of the country's former president Rolandas Paksas demonstrated that such sentiments are not always enough, since voter support for him and his civil electoral committee was too weak for his re-election as an MEP.

The analysis of the 2019 European Parliament election in Lithuania showed the limitations of such research. It is impossible to separate the impact of political messages involving emotions from other important factors, such as reputation of specific politicians or political groups, or the number of constantly loyal supporters and their mobilization capacities. The analysis of the European Parliament election in Lithuania has demonstrated some natural limitations that stem from the low level of public enthusiasm for this type of election, as voters continue to demonstrate quite a high level of indifference towards them. However, the study results suggest at least two possible channels for additional research. There is significant room for comparative research on the role of emotions in the European Parliament elections in the smaller EU Member States, as this involves the role of personalities. Moreover, the text demonstrates the value of additional research on the role of emotions in the domestic elections in Lithuania and opens up new angles of understanding the politics of this Baltic State, thereby providing additional insight for comparative political research.

References

Aleknonis, G. and Matkevičienė, R. (2016) Populism in Lithuania: Defining the research tradition. *Baltic Journal of Law and Politics, 9*(1): 26–48. https://doi.org/10.1515/bjlp-2016-0002

Bandes, S. A. (2013) Emotion and deliberation: The autonomous citizen in the social world. In Fleming, J. E. (ed.) *Passions and Emotions*. New York: New York University Press. 189–211.

Bechter, N. (2019) 'Europe of Nations': A Study on Extreme Right Parties and the EU integration. transform! Brussels: European Network for Alternative Thinking and Political Dialogue. Available at https://www.transform-network.net/fileadmin/user_upload/2019-05-europe_of_nations_final.pdf. Accessed: 29-03-2020.

Bobryk, A. (2013) *Społeczne znaczenie funkcjonowania polskich ugrupowań politycznych w Republice Litewskiej 1989–2013 (Social meaning of the functioning of the Polish political groupings in the Republic of Lithuania, 1989–2013)*. Siedlce: Siedleckie Towarzystwo Naukowe.

Cabada, L., Hloušek, V. and Jurek, P. (2014) *Party Systems in East Central Europe*. Lanham: Lexington Books.

Capelos, T. and Katsanidou, A. (2018) Reactionary politics: Explaining the psychological roots of anti preferences in European integration and immigration debates. *Political Psychology, 39*(6): 1271–1288. https://doi.org/10.1111/pops.12540

Castells, M. (2011) *Communication Power*. Oxford: Oxford University Press.

Cottam, M. L., Mastors, E., Preston, T. and Dietz, B. (2016) *Introduction to Political Psychology*. New York: Routledge.

Csergő, Zs. and Regelmann, A-C. (2017) Europeanization and collective rationality in minority voting. *Problems of Post-Communism, 64*(5): 291–310. https://doi.org/10.1080/10758216.2017.1330659

Denisenko, V. (2018) Political power for an 'ethnic ghetto': The case of Lithuania. *International Centre for Ethnic and Linguistic Diversity Studies*, March 5. Available at https://www.icelds.org/2018/03/05/political-power-for-an-ethnic-ghetto-the-case-of-lithuania/. Accessed: 29-03-2020.

Duvold, K. and Jurkynas, M. (2013) Lithuania. In Berglund, S. et al. (eds.) *The Handbook of Political Change in Eastern Europe*. Cheltenham: Edward Elgar. 125–166.

Girardet, R. (2007) *Politiniai mitai ir mitologijos (Political myths and mythologies)*. Vilnius: Apostrofa.

Hix, S. and Marsh, M. (2011) Second-order effects plus Pan-European political swings: An analysis of European parliament elections across time. *Electoral Studies, 30*(1): 4–15. https://doi.org/10.1016/j.electstud.2010.09.017

Janušauskienė, D. (2016) Ethnicity as political cleavage: The political agenda of the Polish national minority in Lithuania. *Nationalities Papers, 44*(4): 578–590. https://doi.org/10.1080/00905992.2016.1156073

Jurkynas, M. (2014) The parliamentary election in Lithuania, October 2012. *Electoral Studies, 34:* 334–338. https://doi.org/10.1016/j.electstud.2013.08.019

Kascian, K. (2019) 2019 European Parliament election: The electoral action of Poles in Lithuania narrowly won an MEP seat. *International Centre for Ethnic and Linguistic Diversity Studies*, May 27. Available at https://www.icelds.org/2019/05/27/2019-european-parliament-election-the-electoral-action-of-poles-in-lithuania-narrowly-won-an-mep-seat/. Accessed: 29-03-2020.

Kavaliauskaitė, J. (2014a) The secret of political leaders' personal appeal: (How) do personality traits matter? *Baltic Journal of Political Science, 3:* 113–133. https://doi.org/10.15388/BJPS.2014.3.4867

Kavaliauskaitė, J. (2014b) Asmenybės ar vertybės? Lietuvos partijų lyderiai rinkėjų akimis ir politikos personalizacijos ribos (Personalities or values? Leaders of Lithuanian parties in the eyes of voters and limits of personalization of politics). *Politologija, 73*(1): 129–178. https://doi.org/10.15388/Polit.2014.1.2991

Knutowicz, E. (2018) In the shadow of scandal: Poland's Independence Day in Lithuania. *International Centre for Ethnic and Linguistic Diversity Studies*, December 3. Available at https://www.icelds.org/2018/12/03/in-the-shadow-of-scandal-polands-independence-day-in-lithuania/. Accessed: 29-03-2020.

Lauristin, M., Norkus, Z. and Vihalemm, P. (2011) On the sociology's contribution to knowledge of the Baltic way. *Sociologija. Mintis ir Veiksmas, 29*(2): 128–155. https://doi.org/10.15388/SocMintVei.2011.2.6129

Marcus, G. E. (2002) *The Sentimental Citizen: Emotions in Democratic Politics*. University Park: Pennsylvania State University Press.

Matonytė, I. (2016) Lithuania. In Viola, D. M. (ed.) *Routledge Handbook of European Elections*. Abingdon: Routledge. 527–548.

Miller, P. R. (2011) The emotional citizen: Emotion as a function of political sophistication. *Political Psychology, 32*(4): 575–600. https://doi.org/10.1111/j.1467-9221.2011.00824.x

Moffitt, B. (2019) Populism versus technocracy performance, passions, and aesthetics. In Cossarini, P. and Vallespín, F. (eds.) *Populism and Passions: Democratic Legitimacy after Austerity*. Abingdon: Routledge. 49–64.

Norris, P. and Reif, K. (1997) Second-order elections. *European Journal of Political Research, 31*(1): 109–124. https://doi.org/10.1111/1475-6765.00308

O'cass, A. (2002) Political advertising believability and information source value during elections. *Journal of Advertising, 31*(1), 63–74. https://doi.org/10.1080/00913367.2002.10673661

Pettai, V. (2005) Assessing institutional determinants of MP behaviour: Survey data from the Baltic states. *Sociologický Časopis, 41*(3): 461–486. https://doi.org/10.13060/00380288.2005.41.3.07

Reif, K. and Schmitt, H. (1980) Nine second order national elections: A conceptual framework for the analysis of European election results. *European Journal of Political Research, 8*(1): 3–44. https://doi.org/10.1111/j.1475-6765.1980.tb00737.x

Taggard, P. and Szczerbiak, A. (2008) Introduction: Opposing Europe? The politics of Euroscepticism in Europe. In Taggard, P. and Szczerbiak, A. (eds.) *Opposing Europe? The Comparative Party Politics of Euroscepticism: Volume 1: Case Studies and Country Surveys*. Oxford: Oxford University Press. 1–15.

Unikaitė-Jakuntavičienė, I. (2014) Eurosceptics in Lithuania: On the margins of politics? *European Quarterly of Political Attitudes and Mentalities, 3*(4): 1–21.

Unikaitė-Jakuntavičienė, I. (2019) Lithuania. In Eibl, O. and Gregor, M. (eds.) *Thirty Years of Political Campaigning in Central and Eastern Europe*. London: Palgrave Macmillan. 65–82.

Weber, C. (2013). Emotions, campaigns, and political participation. *Political Research Quarterly, 66*(2): 414–428. https://doi.org/10.1177/1065912912449697

Wenxiu, P. (2015) Analysis of new media communication based on Lasswell's '5W' model. *Journal of Educational and Social Research, 5*(3): 245–250. https://doi.org/10.5901/jesr.2015.v5n3p245

Willermain, F. (2014) From 'second-order' elections to 'first-order supranational' elections: A state of play after the 2014 EU elections. *Studia Diplomatica, 67*(3): 93–107.

Yates, H. E. (2019) *The Politics of Spectacle and Emotion in the 2016 Presidential Campaign*. London: Palgrave Macmillan.

ANNA MALEWSKA-SZAŁYGIN *

Emotions and Civility: Everyday Talks about Politics with Rural Inhabitants of Southern Poland

Intersections.EEJSP
6(2): 61–80.
DOI: 10.17356/ieejsp.v6i2.642
http://intersections.tk.mta.hu

* [a.malewska-szalygin@uw.edu.pl] (Institute of Ethnology and Cultural Anthropology, University of Warsaw)

Abstract

Typical conversations about political matters are charged with emotion. Political matters are understood here as a thematic field involving talks about central authorities and parliament, as well as comments on news provided by the media. Talks about this topic often occur during neighborly meetings and family or social gatherings. I conducted ethnographic interviews to analyze how rural inhabitants talk about such political matters. During the interviews, especially polyphonic ones, I observed the accompanying emotions, such as raised voices, faces bloodshot with irritation, lively gestures, the use of irony, and sometimes vulgar language and swearing. Anger, resentment, anxiety, fear, contempt, hostility, and even hatred were unmistakable signals of emotional involvement in political matters and engagement in debate about the common good and public affairs. Thus, the question arises: are such conversations a form of civility?

Keywords: *emotions, civility, Poland, post-peasant narratives*

1. Theoretical background and research questions

'Civility' is a fundamental notion in debates about civil society. Such debates have changed dynamically since antiquity, including during the Enlightenment, and have become revived in the time of the transformation of Eastern European countries. Currently, the idea of 'civil society' is transnational, universalized, and globalized (e.g. Balibar, 2009; Cohen and Arato, 1992; Dunn and Hann, 1996; Ekiert and Kubik, 1999; Gellner, 1991; Ferguson, 2007; Nash, 2007; Shils, 1997). Civility, however, remains an ambiguous notion, the interpretations of which have changed as dynamically as the interpretations of civil society. On the one hand, it relates to a feature of human behavior characterized by politeness, courtesy, and civilized conduct (e.g. Billante and Saunders, 2002); on the other, it denotes a civilized manner of engaging in public debate and acting for the common good (e.g. Shils, 1997). Moreover, civility refers to a form of involvement in common affairs that meets certain standards. Zizi Papacharissi proposed some standards of civility based on source material comprising online comments about political matters. She argued that we can talk about civility when we answer in the negative to three basic questions: 'Does the discussant verbalize the threat to democracy […], Does the discussant assign stereotypes […], and Does the discussant threaten others' individual rights?' (2004: 274). Of course, other plausible standards of assessment might be used to diagnose civility, but at the end of this article, I assess the civility demonstrated in the case interviews using Papacharizzi's standards.

'Liberal civility' (Calhoun, 2000) in several theoretical approaches has been linked with the model of the 'rational citizen.' Marcus argued for opposing the terms 'rational citizen' and 'sentimental citizen' (Marcus, 2003). Agreeing with his critique of the rationalist approach, I do not plan to use the term sentimental citizen, which does not fit with my source material. However, at the turn of the twenty-first century, social anthropologists showed the inadequacy of the rational model for describing the complexity and dynamics of the contemporary processes of socio-political engagement; this is mainly because this model fails to acknowledge the key component of the public-political life: emotions (Aretxaga, 2003; Laszczkowski and Reeves, 2018; Lutz and Abu-Lughod, 1990; Navaro-Yashin, 2012; Stoler, 2004; and others). In this dichotomy ('emotional vs. rational') emotions have been typically characterized pejoratively and seen as 'inferior,' 'irrational,' 'substandard,' 'natural,' 'feminine,' and 'uncontrolled' (Lutz, 1986). Catherine Lutz and Geoffrey White have presented many theoretical approaches toward emotions, criticizing these simplifying oppositions (Lutz and White, 1986). For my purposes, the most important statement about emotions is captured in a quotation by Michelle Rosaldo: 'emotions are not things opposed to […] thought so much as *embodied* thoughts, thoughts seeped with the apprehension that *I am involved*' (Rosaldo, 1984: 146). Emotions are thus a form and a proof of involvement; they are 'the expression of personal moral values' (Lutz, 1986) that generate the potential to mobilize social engagement; often, they bind people with very strong ties construing a 'community of feelings' (Berezin, 2001); in other situations, they polarize people who construct walls on opposite sides of the

political barricade. Emotions are 'socio-culturally constructed, dynamic, and interactive processes' (Boiger and Mesquita, 2014: 228); thus, they are dynamically changing and embedded in three contexts: 'in-the-moment interaction,' the social (relationships), and the cultural, and interplay dynamically among these contexts (Boiger and Mesquita, 2014). Emotions are 'expressed within and against the constraining and ordering framework of culture, history, and structure' (Lindholm, 2007: 44). The emotions that accompany everyday conversations and also our interviews about political matters are evoked and situationally shaped through real conversations with neighbors, cousins, or researchers; they are entangled in social relations and the positions of interlocutors; they take the form which is specific to the cultural context: in this case, defined by the rural character of the case study village and by the specificity of the highland region. They are evoked, shown, and transformed during the verbalization of personal convictions. Such convictions and imaginaries are thus embodied in these emotions.

These convictions and imaginaries are presented in very specific rough 'poetics' (Herzfeld, 2005) that enmesh heated emotions expressed in an impolite manner. Zizi Papacharissi, in distinguishing between 'politeness' and 'civility,' points to the danger of failing to notice the potential for 'civility' in discourses that employ impolite, rough rhetoric. She writes that 'we need to [...] strive for a sense of civility that is acceptable across cultural terrains' (2004: 265). In her definition, civility 'focuses on respect for collective traditions of democracy' (2004: 270), but does not require correct, polite forms of discourse. From an analysis of online newsgroups, she shows that some published statements that do not meet the requirements of politeness retain the potential of civility. Thus, based on her assertion, I pose the following research question: do the narrative interviews – brimming with incorrect, indecent statements and heated emotions – have the potential for civility? Can this specific voice within the public debate – which is impolite, and thus uncivil – constitute a specific form of civility?

2. Research projects

I searched for answers to the former questions in the source materials of research projects implemented in the first decades of the twenty-first century with the following subjects: *Ethnopolitics – conversations about politics with highlanders* (1999–2001); *Imaginaries about the state, power, politics and democracy* (2004–2005); and *Ethnography of receiving media messages and the common knowledge* (2012–2014). I conducted these research projects in the villages of the southern part of the mountainous region of Podhale in Poland, and in a marketplace in the town of Nowy Targ (the name in Polish means 'New Market') at the foot of the Tatra Mountains in the Carpathians.

During one-week trips (four for each research project), together with three different groups of students I conducted and recorded ethnographic interviews that were later transcribed by students. The process of interviewing was accompanied by participant observations focused on expressed emotions. Interviews were recorded in country farmyards, next to shops, churches, but most

often at the town marketplace. They often took the form of polyphonic debates with 2–4 interlocutors, and it was especially those polyphonic talks in the town marketplace that frequently became very emotional. Approximately 380 interviews were recorded and transcribed during the first project (with the participation of 12 students), approximately 70 during the second, and around 90 during the third. The research directive differed slightly for each project, but generally we asked residents about voting preferences and the justifications thereof. In the years 1999–2001 and 2004–2005 the fieldwork disposition encouraged tracing local interpretations of terms such as power, nation, the state, politics, and democracy; it allowed researchers to present their political views in polyphonic talks in order to generate more of a sense of partnership and lively debates. In the years 2012–2014, the interviews were sometimes accompanied by shared TV watching and recording commentaries of TV and radio messages.

Our interlocutors during all the projects were randomly chosen inhabitants of the villages of the Nowy Targ district, aged 35–80; just over half of them were men, mostly Catholics. A majority had completed vocational education, while ca. 30 per cent had finished technical secondary education (only a few people had experienced higher education: the mayor, priest, teacher, and librarian). They often described themselves as 'farmers,' even if they had little land and had been forced to take up seasonal labor at home and abroad before and after the transformation. Most of them worked as seasonal labor migrants, very often as hired workers on construction sites.

The Nowy Targ basin at the foot of the mountains is a region with poor arable land, formerly impoverished. Because of the hindered development of farming, it has a centuries-old tradition of economic migration to other parts of the Habsburg Empire, and, since the turn of the twentieth century, to the United States. In the time of the People's Republic of Poland, large production facilities were built there (factories producing shoes, skiing equipment, sweets, and many other products) and a large state-owned tourist infrastructure was created, which provided the highlanders with additional employment. During the transformation period, the abolition of state factories and tourist infrastructure forced many citizens to migrate in search of work; this process intensified after Poland acceded to the EU. In comparison with the earlier, long-term migrations to the US (those that happened before WWII and continued during the times of the People's Republic), more recent journeys to EU countries have been frequent but usually short term. At the time of the research, especially the last project, the economy in the region was in much better shape than it was during the transformation, mainly due to remittances and profits from tourism (earned by private companies) connected to the vicinity of the mountains.

Anthropological publications about the Podhale region in the twenty-first century are mostly concerned with its folklore and cultural heritage, and focus on the higher parts of the Podhale region located around Zakopane – the 'Rocky Podhale' that is more interesting for tourists (for example: Kroh, 2002; Małanicz-Przybylska, 2017; Tylkowa, 2000). Anglophone anthropological publications that refer to fieldwork in the Nowy Targ district (the lower part of the Podhale region)

are limited to the works of Frances Pine, who has conducted ethnographic research in this area since 1978 (e.g. 1999, 2000, and 2002).

The villages around Nowy Targ are characterized by a preference for right-wing voting. Support for the right-wing party Law and Justice (*Prawo i Sprawiedliwość,* or PiS) in parliamentary elections has steadily grown here since 2005.

Table 1. Voting results for the Nowy Targ district (% of votes). Data available on the State Electoral Commission website https://pkw.gov.pl.

Date	PIS	PO
2005	39,58	27,17
2007	51,94	31,62
2011	51,82	29,62
2015	59,45	14,73
2019	66,69	14,15

Support for PiS has grown at the cost of support for the more liberal party Civic Platform (*Platforma Obywatelska*, PO), even in the years 2007–2015 when the Civic Platform was the ruling party in Poland. Since 2015, Poland has been ruled by PiS, the party supported by most of our interlocutors.[1]

3. Forms of expressed emotion

The narrative interviews with village inhabitants were not calm exchanges of information, arguments, and points of view. We observed that the polyphonic conversations initiated by researchers conducted at the market and other meeting places were particularly dynamic and expressive acts. During these 'performances,' interlocutors presented their political convictions to an audience limited to two, three, or four individuals, including the researcher. Our interlocutors thus identified themselves emotionally with the expressed convictions, as embodied by raised voices, lively gestures, and vivid facial expressions. The expressed convictions also used local poetics or rhetoric characterized by specific words (frequently vulgar) and sarcasm or irony, and sometimes unusual semantic formations. Local poetics were intertwined with local imaginaries and viewed as an inseparable whole. In addition to the specific poetics, the language used in this region also posed a challenge. Our interlocutors spoke using a mix of Polish

[1] Our interviewees were village inhabitants who only visited the market place in Nowy Targ, so they were a different social group than the one studied by Maciej Gdula (2018), who conducted his research project among PiS voters in a small Polish town.

characteristic of people with basic or vocational education and the local highlander dialect, employed especially often by older interlocutors. All interlocutors (excluding a few with higher education) also spoke using the intonation specific to highlanders. Of course, translation to English affects the linguistic specificity of the cited interlocutors that involved specific, local poetics and are full of meaningful expression in their Polish-language version. Poignant verbal forms were always accompanied by performatively expressed emotions.

The main focal point of the expressed aversion and even hate was 'politicians.' Our interlocutors used the term 'politicians' in reference to members of parliament and central government officials, not local authorities. They used this word as the symbolic personification of 'people of power,' and attributed it with many moral flaws, mainly being driven by a desire for self-enrichment. Anger is clearly recognizable in recorded declarations, such as: 'Mister, my blood boils when I talk about the government!'; 'I am so angry that I can barely speak!'; 'I can't listen to politics, it makes my blood curl!'; 'My pressure goes up to 220 if I do [talk about politics]'; 'It pisses me off!' Such statements, frequently vulgar, were reaffirmed by engaging the body: raised voices, sharp gestures, and faces red with irritation. Negative emotions were also revealed by the use of curses and swearwords aimed at politicians: 'sons of bitches,' 'fuckers,' 'bastards,' 'asses' (in Polish, the word for members of parliament – *posły* – sounds similar to the word denoting donkeys, *osły*). The vulgarity of the expressions was not only limited to nouns (forms of invective) used to characterize politicians, but also included verbs for describing their action. Most often, the verb 'fuck' in its various forms was used to describe the actions of politicians, accented by visible signs of irritation such as high-pitched voices, gestures, and blood-shot faces. Another expression of anger involved calling for the extermination of members of parliament, expressed in statements such as: 'They should die in gas chambers!', 'Someone should fly an airplane into them!', 'They should be hanged on trees!', 'Hitler should be unleashed on them!', and 'Here, in Podhale, if one of us highlanders saw one of them politicians, we would rip his guts out with a knife!' Proposals for eradicating MPs usually appeared in conversations when levels of irritation peaked; the interlocutors, with red faces, would shout their proposals, wave their arms, and frequently use gestures to demonstrate the proposed method of destroying the politicians. Such forms of expression often provoked the researchers to attempt to calm their interlocutors, which, however, incited the emotional flames even more. We often find that 'it is hard to accept that the results of agency and resistance are not always what we would like to see' (Pasieka, 2017: 28). About the situation of researchers during ethnographic research among right-wing radicals, see Pasieka (2017; 2019).

Another way of expressing aversion and irritation was the use of ironic comments, including expressions like 'Because we like Mister X very much!' (where X indicates the name of the disliked politician). Sometimes sarcasm took the shape of more complex statements, such as the assessment recorded in 2014 of the policies of the liberal party Civic Platform that was in power at the time, formulated by a man in his 40s (of vocational education): 'I might be abnormal

(weird)! Here, in Podhale, we have a "movement of abnormal," because what is normal in Poland now are lesbians, homos, and tax robbery. So, if this is normal, then we might as well be weird!' Such a statement constitutes both a criticism of fiscal policy and the changes in ethics and moral norms associated with the acceptance of sexual minorities. Thus, a mixture of economic and social commentary was combined with a potent addition of anger, which made the interlocutor boil and become almost uncontrollable. The irony in the statement 'we are abnormal' in a situation 'where this is normal,' supported by the shouting out of sentences, a hot-headed attitude, and sudden gestures involved an eruption of anger that was intimidating to the researcher, even though using sarcasm is locally considered a more diplomatic, courteous, and toned down means of expression. This is why irony was the rhetorical form frequently employed in conversations with researchers.

4. Sharing emotions collectively

It was obvious that, despite variety among the chosen forms of expression, irritation and aversion were emotions shared among many of the interlocutors from Nowy Targ. We were frequently surprised by the 'stereotypical set of emotions' (Leavitt, 1996) shown in talks about political matters. John Leavitt explains this phenomenon by observing that the bodily sphere is socio-culturally shaped while stressing that, during socialization, bodies – similarly to minds – undergo training and hence facilitate the collective dissemination of not only specific thoughts but also the emotional states that are signaled by bodily reactions (Leavitt, 1996). As previously mentioned in the introductory section, 'emotions occur in and are shaped by social and cultural contexts' (Boiger and Mequita, 2012: 228), and it is in these contexts that the embodiment of thought takes place. What is more, there is also a very interesting theoretical proposition concerning affect, which is seen as the 'virtual co-presence of potentials based on memory, experience, thought and habit' (Gibbs, 2014: 251) that is produced by different forms of familial and cultural socialization. From this perspective, 'emotion is a selective activation or expression of affect' (Gibbs, 2014: 251). The theory of affect stems theoretically from Spinoza, Tarde, Deleuze and Guattari. It subsequently inspired the concept of 'affective potentiality,' which can be 'discharged' or 'invoked,' for example, by the environment (Navaro-Yashin, 2012: 20), and take the shape of feelings expressed in various forms. Referring to this statement, I assume that the interview situations caused a discharge of affective potentiality that changed into emotions visible to the observer. However, if we want to thoroughly understand why certain content possesses the specific potential to evoke heated emotions, we must look at the imaginaries embodied in revealed emotions.

5. Post-peasant imaginaries

During our interviews in the Nowy Targ district, we observed that the most extreme emotions were evoked when the interviewee sought to communicate that

the actual political-economic reality diverges from locally accepted normative ideas about 'good governance' derived from rural concept of 'good farm management' (Dobrowolski, 1966). The larger the gap between the local 'social imaginaries' (Taylor, 2004) and the current situation, the greater the irritation, aversion, and resentment in the commentaries. To understand this reaction, an outline needs to be drawn of the 'good governance' to which interviewees refer. Normative ideas about 'good governance' stem from the multi-generational experience of organizing labor on the family farm, interpreted through the categories of traditional peasant culture, with the notable influence of the social doctrine of the Catholic Church (Malewska-Szałygin, 2011; 2017). These social imaginaries were revealed through comparing the state to a family agricultural farm, and the state authorities to the governor; the people to family, and the state to the farm (land) itself. This comparison summarizes and universalizes imaginaries about proper relations between work and property, governance and obligation, submission and domination. This normative model is traditional (in Weber's sense), and paternalistic and autocratic. Although the predecessors of our interlocutors were peasants, and our interlocutors were workers who owned only a small plot of land (but nonetheless called themselves 'farmers'), I call this normative pattern 'post-peasant' (the term also used by Buzalka, 2007). This normative pattern is contemporarily still employed to assess both past and present reality. The post-1989 political-economic reality in Poland has been shaped (to characterize this process in a vastly simplified manner) with the aim of implementing the ideals of liberal democracy and neoliberal capitalism. Such ideas, however, quite starkly differ from post-peasant norms. The disparity between the two models consequently encompasses ideological and affective differences. The resulting tension between them causes emotions to escalate. Local affective potentiality, strongly tied up with the post-peasant normative pattern, thus becomes invoked through reports about how reality is being shaped in a liberal direction, which is considered undesirable by the interlocutors.

6. Topics that especially evoke emotions

Looking at the topics of interviews that evoked the liveliest emotional reactions, even in the first years of the twenty-first century particularly strong emotions were still being evoked in commentary about property transformations. In the second decade of the twenty-first century, the strongest emotions were associated with content related to ongoing ethical and moral social changes.

6.1 The process of privatization

The period of transformation was characterized (again, broadly simplified) by the conversion of state property into private property. This process did not encompass small family farms in Podhale that had never been nationalized; it did, however, cover industrial facilities, tourist infrastructure, and state-owned buildings. In assessments of the situation of the transformation of the economic system through the lens of the post-peasant normative pattern, interlocutors from the Nowy Targ district interpreted it as 'selling out to others the national wealth that the Polish people had worked on [worked to create].' When asked to explain the term 'others,' the former replied that they meant 'other nations.' Upon further questioning, however, they answered 'like Germans and Jews.' Accusations about 'selling the national wealth' became tied to vividly expressed outrage directed at policymakers. In the local perspective, privatization activities, both legal and illegal, were commonly referred to as theft. Interjections such as 'Thieves! Nothing but thieves! I can't bear to even look at them!'; 'They are not afraid of anyone! People or God!'; 'There is a commandment: thou shall not steal, and they steal all the time! They have no conscience!' were accompanied by waving arms and faces purple with anger. The property transformations related to the post-peasant normative pattern were understood as theft; namely, as a breach of one of the sacred commandments and human laws; an attack on the stable, divinely-sanctioned social order, which, of course, led to outcries of outrage and anger. The bitterness visible in the accusations of theft was even more acute considering that, in the words of our interlocutors 'If I steal a watch from someone, it is a sin and law-breaking, and I can go to prison. But they steal houses, hotels, factories, and for them, the law is different. And you don't see them doing time!' The feeling of injustice due to inequality before the law generated immense irritation that was subsequently presented in utterances that were full of hate. The perceived injustices caused outrage when they were identified with the governance of a traditional farm; when observed on the macro-scale of the entire state (imagined as a great national farm), they evoked even stronger feelings.

6.2 Redistribution of public funds

Another area of injustice that evoked resentment was the great disparity in the redistribution of public money. At the beginning of the twenty-first century, the media provided information about the public resources distributed by state institutions among various social groups. From the media news, our interlocutors could find out that the earnings of MPs or government officials paid from the state budget were many times higher than their pensions or disability benefits. Immense inequalities in the distribution of public assets caused anger, expressed in statements such as the following: 'To become a politician is to be at the top of the pecking order: the money they have is fantastic!'; 'How much money do they take [spend] in that parliament of theirs! – and me? My pension is like a starvation wage!'; 'They are milking us dry during this transformation.' The feeling of

injustice and the outrage connected to it becomes understandable when we relate the situations thus described to post-peasant normative patterns. On a traditional agricultural farm, when farm workers were hired, it was obligatory to pay them justly; that is, a living wage (Dobrowolski, 1966; Thomas and Znaniecki, 1918). Paying out disability benefits or pensions insufficient for survival (and such were the amounts paid out during the 1990s; at the beginning of the twenty-first century the situation improved) was seen as an injustice and a fundamental aberration in terms of the correct governance of shared funds.

6.3 Liquidation of the footwear factory

A particularly emotional and widely commented-on experience was the 1990 bankruptcy of the state-owned Nowy Targ Leather Industry Combine. 'Podhale' was founded in 1955 and employed about 9,000 workers from Nowy Targ and Podhale villages in the 1960s and 1970s, producing up to nine million pairs of shoes annually. Stories about the liquidation of the huge factory were charged with despair, as expressed in the following words: 'They allowed the combine to collapse! So many people worked there! Everyone was left jobless!'; 'In the combine, people worked on 24 conveyor belts, on two shifts! In the company that makes shoes now, there are two belts! Almost the entire crew had to fuck off abroad! And the factory itself – it was the leading [one of its] kind!' I was particularly moved by the painful memories of one of the workers at the combine: 'I was working at the time when they shut down the combine. It was so stressful for the workers that you couldn't imagine. One's hair would go white, you wanted to just hang yourself. I worked in the combine for 18 years! When they told us that it was over, I lay down in the locker room on a bench and my legs became paralyzed. I couldn't stand up because of the stress.' This grief and resentment were caused, as the interlocutor explained, by the 'wasteful governing' of the government. Use of this expression relates to the normative understanding of 'good governance.' Thus, concerning this pattern, privatization was considered a sign of the immense wastefulness of central authorities.

In contrast to the closure of the combine, processes of privatization on the national scale did not evoke nostalgia or sadness, but rather rage expressed by gestures, facial expressions, and vocal intonation accompanied by bitter words: 'They have sold Poland!'; 'Fifty years we'd worked, and today everything has been sold for petty cash!'; 'They are selling our property to make Poles into slaves for other nations!'; 'Nobody knows who they are selling it to, but it belonged to every one of us!'; 'They have hardly anything to rule over, they sold everything to others!'; 'They serve foreign interests, they don't care about Poland!'; 'It's a disaster! They closed and sold everything!'; 'Is it normal to sell Polish soil to others?! Or factories?! They're selling everything to foreigners!' The transcripts of interviews we collected are filled with such expressions. One can hear in them the accusation that Polish national interests have been betrayed. Many of those accusations, expressed in the interviews from the beginning of the twenty-first century, were aimed directly at professor Leszek Balcerowicz, the Minister of

Finance who directed the processes of privatization in the 1990s. These processes were locally understood as 'selling out the national wealth,' and seen as high treason: a betrayal of the nation understood in ideal terms and imagined based on the highlander's extended family values. To betray a family by selling one's family farmland – inherited through the family for centuries – was considered a tragedy, and the final ruin of one's lineage (Dobrowolski, 1966; Thomas and Znaniecki, 1918). In conjunction with the post-peasant normative pattern, it explains the immensity of desperation and accusations of betrayal that accompanied conversations about the national-scale privatization process.

Anger and resentment continued to be expressed in our interviews in 2012–2014, when a very aggressive and vulgar tone was employed when speaking about the leader of the Civic Platform (the ruling party at the time) who was prime minister (2007–2014). The latter was accused of being responsible for continuing privatization; the privatization of the health service and energy services elicited particularly strong outrage. With loud shouting, accusations were made that the leader was serving the interests of the German economy. The fact that he is Kashubian in origin (Kaszuby is an area in northern Poland which was historically under Prussian occupation), tied him, in the interlocutors' imaginaries, to the German government. The act of treason of which he was accused in the conversations evoked heated emotions, performatively played out in sharp, vulgar words, hateful gazes, raised voices and gestures revealing extreme outrage.

When assessing the function played by such emotions, there is a need to highlight their bonding potential. Shared feelings of outrage, bitterness, and anxiety created strong ties in the community, which had experienced the process of privatization in a similar way. The stimulatory function of this was visible in the incitement of local interlocutors to action; namely, to participate in elections and vote for a right-wing party, and to vivid, emotional, and engaged advocacy for PiS, which was perceived of as party that would block the privatization processes and be more congruent with the post-peasant normative pattern and the associated post-peasant affective potentiality.

6.4 Morality changes perceived as novelties

A prominent topic in the interviews undertaken in the years 2012–2014 was the problem of changes in the ethical and moral order. Of course, morality is a very dynamic and multidimensional socio-cultural process (Csordas, 2013), but our interlocutors perceived and articulated these developments as a moment of clear change. They intensively criticized Pride Parades and the various forms of expression of sexual diversity and its acceptance, clearly contrasting them with what they called 'normality' or 'nature.' It was argued with intense engagement that such things '[are] against nature!' This statement was frequently supported with examples from animal life, involving pointing to the differences in the sexes necessary for breeding purposes. What was surprising was that even though these topics were very irritating to the interlocutors, they limited their forms of expression, for example, by abstaining from using vulgar language. This was not,

however, because of political correctness – Nowy Targ's village interlocutors were far from concerned with this. Such changes in accepted customs were considered extremely upsetting, but how this was expressed was mitigated because sexuality in village conversations has typically involved indistinct references, irony, and joking suggestions. Sexual matters have been considered inappropriate for public discussion. For this reason, few vulgar descriptions were used for sexual minorities; instead, local verbal constructs were more frequently used, such as *seksualiści* ('sexuals,' not 'homosexuals') as a description for sexually non-normative people.

Changes in the ethical and moral order were considered as interfering with the world order, which was associated with the traditional peasant worldview (Dobrowolski, 1966; Thomas and Znaniecki, 1918-1920, and others) and to the concept of the consolidated order of the universe as understood from the Bible, passed down by generations of village parish priests, and along intergenerational family lines. Undermining this legitimized, sacred order was considered a sign of oncoming doomsday, and was supported by the quotation of prophecies that circulated around the village in hand-written copies. Lifestyle changes seen from this perspective caused concerns about 'divine retribution.' Attacking the foundations of the world order – as news media about Pride Parades were interpreted as doing – was also connected politically to liberals. The feeling of dread stimulated our interlocutors to take action: during subsequent elections, they mostly voted against liberal parties, raising support for their right-wing opponents. These shared concerns strongly consolidated the community, worried about upsetting the foundations of traditional morality.

6.5 Affective epidemics

Some of the media messages that reached the inhabitants of the villages of the Nowy Targ district caused 'affective epidemics' (Gibbs, 2014); namely, rapidly spreading emotional reactions to content and images shown in the media. An example of this is the affective epidemic that was caused by the so-called 'apple scandal' in 2014. In spring 2014, after the Russian aggression in Eastern Ukraine, the Polish government declared support for Ukraine, which resulted in Russian sanctions limiting the purchases of grocery products, specifically apples from Polish orchards. This event was widely commented on in the villages in the district and assessed very critically. The apple scandal caused a feeling of anxiety, which our interlocutors justified by referring to common-sense based on a process of 'typification' (Berger and Luckman, 1966). Referring to national stereotypes, they argued that Ukrainians do not deserve Polish support or solidarity because, according to local knowledge about the past conveyed in families, they had often been brutal and aggressive to Poles. Russia, in turn, was called 'Poland's sworn enemy' and Russians 'Asian barbarians,' thus portrayed as a dangerous and vast foe – dangerous due to its lack of respect for the diplomatic rules of international relations. The fear of Russian sanctions spread quickly and widely, taking over the imagination of our interlocutors. Why was it that particular piece of news that

electrified public opinion to such an extent? First, the apple scandal was connected to matters of the economy, which were always considered a priority by our interlocutors. Second, it directly affected small-scale entrepreneurs (orchard owners) but not the big financial players, which our interlocutors did not identify with. Third, it activated previous cognitive categories – namely, stereotypes; at the same time discharging an affective potentiality indissolubly tied up with these. The effect that ensued was a large eruption of anxiety. Considering that the ruling party of the time was the Civic Platform, one cannot exclude that it was this anxiety that pushed the interlocutors to participate in large numbers in the electoral elections of 2015 and to vote for the right-wing party, PIS.

6.6 Hidden strategies of media producers

Immense emotional reactions were also provoked by that which was locally referred to as 'speaking untruth.' The expression was used to describe the discrepancy between media messages and interlocutors' own experiences, as well as the opinions hammered out between families, friends, and neighbors. It is obvious to social scientists that the media produce 'mediascapes'; namely, 'image-centric, narrative relations of [...] fragments of reality, produced by private or public companies' (Appadurai, 1996: 34). Mediascapes, cautiously constructed to create 'an impression of objectivity' or 'the illusion of bedrock factuality' (Herzfeld, 2001: 295), promote the 'strategies of producers' (Certeau, 1988: XXIV). The titles of Polish news programs such as *Wydarzenia* (Events) or *Fakty* (Facts) serve to create the illusion of a full reference to demonstrable reality. The interlocutors, without delving into complex argumentation, summarized the issue of mediascapes and the strategies of producers with a succinct, angry contention: namely, that 'the media are lying.' This conclusion was usually associated with all forms of media, except those that were trusted. 'The social production of mistrust is based on specific practices that necessarily stem from past negative experiences, which are reactivated in the present through the group's collective memory' (Giordano and Kostova, 2002: 75). A feeling of being lied to greatly irritated our interlocutors.

The strategies of media producers which caused irritation were confronted with our interlocutors' own 'tactics' (Certeau, 1988), captured in statements such as 'you always have to approach what the media is saying with common sense'; 'Old folks that have been through war and what came after, they know. We only have what we hear on the TV'; 'TV can't be trusted, you have to listen to the old folks, to what they are saying.' The tactics referred to imaginaries about the past adopted from the stories of close ones, mainly the elderly; however, they were often supplemented with information obtained from the one media source that was trusted and considered as somewhat of a friend (in the case of older people, this was typically *Radio Maryja*,[2] while the younger ones would refer to their favorite

[2] Radio Maryja – a Polish Catholic radio station founded on December 8, 1991 in Toruń by members of the Congregation of the Holy Redeemer (Redemptorists). It is the largest religious broadcasting station in Poland, and is very popular among the elderly Nowy Targ district interlocutors we

news program). The information obtained from such sources was subsequently used to construct a kind of a local 'verification apparatus' (Malewska-Szałygin, 2018): a common-sense heterogenic conglomerate of prior categories obtained from one's own and one's family multi-generational experiences, and from the teachings of rural parish priests, mixed with fragmented primary-school knowledge. This cognitive instrument was used as a filter for media news through which the receiver could critically assess the received information. The verification of this, expressed in words ('the press is lying, the TV is lying, everyone is lying!') evoked extreme emotions of outrage and anger, and even a feeling of degradation. The media 'lies' were considered unjust and, what is worse, a sign of contempt for an audience considered to be so naive and stupid that they were easy to deceive. In a situation in which this deception was related to an entire vision of economic-political reality, it was considered particularly malicious, humiliating, and undignified to the spectator/listener, which in turn caused anger and provoked sharp, aggressive responses accompanied by aggressive body language.

7. Emotional barriers destroying public debate

Emotions accompanying conversations about political matters revealed bitterness and anxiety aimed at the transformative and post-transformative change, and criticism and anger towards 'politicians' (MPs and central authorities, especially those connected to the liberal party). This attitude resulted in emotional engagement with right-wing party involvement and a distrust of liberal media, which were 'irritating' to the majority of our interlocutors. Among the elderly interviewees, the most popular media platform was the Catholic Radio Maryja and its sister television station Trwam (*Abide*), supplemented of course by the main program of the public, state-owned, main Polish television station, TVP 1. Middle-aged media consumers generally watched TVP 1; some of them turned to TV Polsat, a commercial, primarily entertainment-oriented TV station. Very few of our interlocutors declared that they watched TVN, the liberal commercial TV. Radio broadcasts were listened to mainly at work (manual labor); stations included the main, state-owned channel Program 1. In addition to Polish state radio, a particularly popular choice was the local commercial radio station Radio Alex, heard very often on local buses. During the years 2012–2014, when the third research project was conducted, the main TV and radio stations (TVP 1, Polish Radio Program 1) presented the ideological line of the liberal party that was in power at the time. Distrust and irritation towards this led our interlocutors to avoid the media, which they accused of 'messing with their heads' or 'brainwashing people.' As a result, the majority of interlocutors would watch or listen to only one TV or radio station, thus wrapping themselves in an information-interpretation bubble, produced by, for example, Radio Maryja. The lack of trust in other media outlets, strengthened by an aversion towards them,

interviewed for the 2012–2014 research project. Sociological research on *Radio Maryja* has been summarized in a book by Ireneusz Krzemiński (2009).

blocked out contact with media that offered alternative political options, cutting off the stream of alternative interpretations of reality. Listeners of the station Radio Maryja shared the rhetoric that this station was using (absorbing it to a greater or lesser extent), its interpretations of published news, and the level of emotional charge intimated as appropriate by the producer. This situation was conducive to the closing up of groups with similar political views; the latter became surrounded by emotional barriers that prevented the potential influence of other opinions. This made it functionally impossible to exchange arguments and engage in constructive discussion.

Emotions that I typically associate with revolutionary zeal and the drive to cause a change in this case served to stabilize (entrench) political views, and to strengthen the barriers between people with different views. Emotions thus strengthened individual and group political convictions and prevented their potential modification. A shared sense of resentment, outrage, and irritation caused by transformation processes, parades for equality, economic scandals, and the untrustworthiness of the media solidified jointly shared convictions and shared affective potentiality. Few individuals were ready to break out – all the more since they shared the same affective potentiality. Such a change in convictions would mean locating themselves outside the community of feelings.

Peer pressure was also complemented by contempt for people whose political convictions had changed, as transpired from our conversations. Such people were referred to with disapproval: '*kurek na kościele*' (as changeable as a weathercock), or as '*farbowany lisek*' (dyed foxes, i.e. double-dealers). When talking about the activists from the peasant party PSL (Polish People's Party) who had changed allegiance from the communist peasant party ZSL (United People's Party), our interviewees said that they are 'like watermelons: green on the outside, but red on the inside,' expressing disapproval at such changes in political views with gestures and facial expressions. A social reluctance to change one's convictions was the reason that interlocutors would very rarely and only reluctantly admit to any evolution in their views. The problem with this process was not the content of argumentation, which was considered and modified through rational discussion. The factor that motivated interviewees' conviction was emotion. Therefore, mutually shared anger, outrage, and sometimes anxiety and sadness were what made political convictions increasingly more hermetic, preventing views from evolving and blocking openness towards other opinions, and consequently making public debate impossible.

8. Disrespectful civility?

In this paper, I have described the eruptions of emotions observed in interviews with village inhabitants of the Nowy Targ district. Vulgar language, irony and irritation; purple faces which expressed anger, contempt, and sometimes sadness and anguish; and raised voices shouting invective accompanied conversations about political matters. I have listed the topics that evoked such strong emotions: the process of privatization (especially the liquidation of the footwear factory in

Nowy Targ), the redistribution of public funds, changes in morality perceived as novelties, the 'apple scandal' interpreted as involving national stereotypes, and a 'lying media' involving the hidden strategies of media producers. I have also described the two opposite functions of the emotions that we observed: on the one hand, helping create strong bonds in communities with similar ideas and feelings, but on the other, strengthening the barriers between groups with different convictions.

In order to explain the local point of view that such ideas stem from, I have shown that local imaginaries and affective potentiality are indissolubly tied up with the post-peasant normative pattern. The post-peasant normative formula makes it possible to understand local thoughts and the emotions that embody them. This perspective also shapes the specific poetics of rural talk about political matters, which certainly do not meet the requirements of politeness. The question is, do they also deny the requirements of civility?

Judging from the perspective of Zizi Papacharissi's standards of civility, the attitude of village inhabitants does not meet liberal democratic standards because it refers to another normative model derived from farm management experiences and farm work organization. Consequently, we can say that the latter approach 'focuses on […] respect for […] collective tradition' (Papacharissi, 2004: 270), but that this is not the 'tradition of democracy' (ibid.). Proposals to exterminate MPs, which sound like 'threats to others' individual rights' (ibid.) should not, however, be taken literally, but rather as a form of expressing the emotional commitment of the speakers through specific poetics. The rough and non-democratic forms of expression of our interlocutors fail to meet Papacharissi's standards of civility. The incivility of the observed form of local discourse is obvious – the form of expression is certainly 'disrespectful' (Coe et al., 2014), but it still carries with it the potential for commitment to the common good. Thus, what should we call this uncivil form of discursive and emotional involvement that is connected to the post-peasant normative pattern, with its attendant consequences in terms of different expectations and electoral preferences? Is it a rough form of civility? I think that calling this form of involvement 'civility' is problematic, but it certainly has an alternative, but politically important, discursive and affective potential. The increase in support for the PiS party in the region (as previously shown in Table 1) shows that this impolite potential can be mobilized and utilized politically.

References

Appadurai, A. (1996) *Modernity at Large. Cultural Dimensions of Globalisation.* Minneapolis: University of Minnesota Press.

Aretxaga, B. (2003) Maddening states. *Annual Review of Anthropology, 32*: 393–410. https://doi.org/10.1146/annurev.anthro.32.061002.093341

Balibar, E. (2009) Europe as borderland. *Environment and Planning Development: Society and Space*, *27*(2): 190–215. https://doi.org/10.1068/d13008

Berger, P. L. and Luckmann, T. (1966) *The Social Construction of Reality: A Treatise in Sociology of Knowledge*. Garden City, NY: Anchor Books.

Berezin, M. (2001) Emotions and political identity: Mobilizing affection for the polity. In Goodwin, J., Jasper, J. M. and Poletta, F. (eds.) *Passionate Politics. Emotions and Social Movement*. Chicago, London: University of Chicago Press. 83–99. https://doi.org/10.7208/chicago/9780226304007.001.0001

Billante, N. and Saunders, P. (2002) *Six Questions about Civility*. St. Leonards, NSW: The Centre of Independent Studies Limited.

Boiger, M. and Mesquita, B. (2012) The construction of emotion in interactions, relationships, and cultures. *Emotion Review, 4*(3): 221–229. https://doi.org/10.1177/1754073912439765

Buzalka, J. (2007) *Nation and Religion: The Politics of Commemoration in South-East Poland*. Berlin: LIT Verlag.

Calhoun, Ch. (2000) The virtue of civility. *Philosophy and Public Affairs, 29*(3): 251–275. https://doi.org/10.1111/j.1088-4963.2000.00251.x

Certeau, M. de (1988) *The Practice of Everyday Life*. Berkeley, Los Angeles: University of California Press.

Coe, K., Kenski, K. and Rains, S. A. (2014) Online and uncivil? Patterns and determinants of incivility in newspaper website comments. *Journal of Communication, 64*(4): 658–679. https://doi.org/10.1111/jcom.12104

Cohen, J. L. and Arato, A. (1992) *Civil society and political theory*. Cambridge, MA, London: MIT Press.

Csordas, S. J. (2013) Morality as a cultural system. *Current Anthropology, 54*(5): 523–546. https://doi.org/10.1086/672210

Dobrowolski, K. (1966) *Studia nad życiem społecznym i kulturą (Studies on social life and culture)*. Wrocław: Zakład im. Ossolińskich.

Dunn, E. and Hann, C. (eds.) (1996) *Civil Society: Challenging Western Models*. New York, London: Routledge. https://doi.org/10.4324/9780203633861

Ekiert, G. and Kubik, J. (1999) *Rebellious Civil Society: Popular Protest and Democratic Consolidation in Poland, 1989–1993*. Michigan: University of Michigan Press. https://doi.org/10.3998/mpub.16117

Ferguson, J. (2007) Power topographies. In Nugent, D. and Vincent, J. (eds.) *A Companion to Anthropology of Politics*. Malden: Blackwell. 383–399. https://doi.org/10.1002/9780470693681

Gdula, M. (2018) *Nowy autorytaryzm (New authoritarianism)*. Warszawa: Wydawnictwo Krytyki Politycznej.

Gellner, E. (1991) Civil society in historical context. *International Social Sciences Journal, 43*(129): 495–510.

Gibbs, A. (2014) Affect theory and audience. In Nightingale, V. (ed.) *The Handbook of Media Audiences*. Malden: Wiley-Blackwell. 251–266. https://doi.org/10.1002/9781444340525.ch12

Giordano, C. and Kostova, D. (2002) The social production of mistrust. In Hann, C. (ed.) *Postsocialism: Ideals, Ideologies and Practices in Eurasia*. New York, London: Routledge. 74–91. https://doi.org/10.4324/9780203428115

Habermas, J. (1992) Citizenship and national identity: some reflections of the future of Europe. *Praxis International, 12*(1): 1–19. https://doi.org/10.4135/9781446250600.n3

Herzfeld, M. (2001) *Anthropology: Theoretical Practice in Culture and Society*. Malden: Wiley-Blackwell.

Herzfeld, M. (2005) *Cultural Intimacy: Social Poetics in the Nation-State*. New York, London: Routledge. https://doi.org/10.4324/9780203826195

Kroh, A. (2002) *Tatry i Podhale*. Wrocław: Wydawnictwo Dolnośląskie.

Krzemiński, I. (ed.) (2009) *Czego nas uczy Radio Maryja? (What does Radio Maryja teach us?)*. Warszawa: Wydawnictwa Akademickie i Profesjonalne.

Laszczkowski, M. and Reeves, M. (eds.) (2018) *Affective States. Entanglements, Suspensions, Suspicions*. New York: Berghahn Books. https://doi.org/10.2307/j.ctvw04f6k

Leavitt, J. (1996) Meaning and feeling in the anthropology of emotions. *American Ethnologist, 23*(3): 514–539. https://doi.org/10.1525/ae.1996.23.3.02a00040

Lindholm, Ch. (2007) An anthropology of emotion. In Casey, C. and Edgerton, R. B. (eds.) *A Companion to Psychological Anthropology*. Malden: Blackwell. 430–447.

Lutz, C. (1986) Emotions, thought, and estrangement: Emotion as a cultural category. *Cultural Anthropology, 1*(3): 287–309. https://doi.org/10.1525/can.1986.1.3.02a00020

Lutz, C. and Abu-Lughod, L. (eds.) (1990) *Language and the Politics of Emotion*. Cambridge: Cambridge University Press.

Lutz, C. and White, G. M. (1986) The anthropology of emotions. *Annual Review of Anthropology, 15:* 405–436. https://doi.org/10.1146/annurev.an.15.100186.002201

Malewska-Szałygin, A. (2011) Post-socialism as a diagnostic tool: Common-sense concepts of power and state in Southern Poland. *Ethnologia Europea, 41*(2): 71–80.

Malewska-Szałygin, A. (2017) *Social Imaginaries of the State and Central Authority in Polish Highland Villages 1999–2005*. Newcastle upon Tyne: Cambridge Scholars.

Malewska-Szałygin, A. (2018) Studies of media audience: An ethnographic approach. *Ethnologia Polona, 38:* 137–151.

Małanicz-Przybylska, M. (2017) *Między dźwiękami Skalnego Podhala. Współczesna góralszczyzna (Between sounds of Rocky Podhale: Contemporary highlanders' culture).* Warszawa: Wydawnictwa Uniwersytetu Warszawskiego. https://doi.org/10.31338/uw.9788323530275

Marcus, G. H. (2003) *The Sentimental Citizen: Emotions in Democratic Politics.* College Station: Pennsylvania State University Press. https://doi.org/10.1017/s153759270335042x

Nash, J. (2007) Transnational Civil Society. In Nugent, D. and Vincent, J. (eds.) *A Companion to Anthropology of Politics.* Malden: Blackwell. 437–447. https://doi.org/10.1002/9780470693681.ch27

Navaro-Yashin, Y. (2012) *The Make-Believe Space: Affective Geography in a Post-war Space.* Durham, London: Duke University Press. https://doi.org/10.1215/9780822395133

Papacharissi, Z. (2004) Democracy online: Civility, politeness, and the democratic potential of online political discussion groups. *New Media & Society, 6*(2): 259–283. https://doi.org/10.1177/1461444804041444

Pasieka, A. (2017) Taking Far-Right Claims Seriously and Literally: Anthropology and the Study of Right-Wing Radicalism. *Slavic Review, 76*(1): 19–29. https://doi.org/10.1017/slr.2017.154

Pasieka, A. (2019) Anthropology of the Far Right: What if we like 'unlikeable' others? *Anthropology Today, 35*(1): 3–6. https://doi.org/10.1111/1467-8322.12480

Pine, F. (1999) Incorporation and exclusion in the Podhale. In Day, S., Papataxiarchis, E. and Stewart, M. (eds.) *Lilies of the Field: Marginal People Who Live for the Moment.* Boulder: Westview Press. 67–88.

Pine, F. (2000) Kinship, gender and work in socialist and post-socialist rural Poland. In Goddard, V. A. (ed.) *Gender, Agency, and Change: Anthropological Perspective.* London: Routledge. 86–101. https://doi.org/10.4324/9780203449660

Pine, F. (2002) Retreat to the household? Gendered domains in postsocialist Poland. In Hann, Ch. (ed.) *Postsocialism: Ideals, Ideologies, and Practices in Eurasia.* London: Routledge. 95–113. https://doi.org/10.4324/9780203428115

Shils, E. (1997) *The Virtue of Civility.* Indianapolis: Liberty Fund.

Rosaldo, M. Z. (1984) Toward an anthropology of self and feeling. In Schweder, R. A. and LeVine, R. A. (eds.) *Culture Theory: Essays on Mind, Self and Emotion.* Cambridge: Cambridge University Press. 137–157.

Stoler, A. (2004) Affective states. In Nugent, D. and Vincent, J. (eds.) *A Companion to the Anthropology of Politics*. Malden: Blackwell. 4–20. https://doi.org/10.1002/9780470693681.ch1

Taylor, C. (2004) *Modern social imaginaries*. Durham, NC and London: Duke University Press. https://doi.org/10.1215/9780822385806

Thomas, W. I. and Znaniecki, F. (1918) *The Polish Peasant in Europe and America: Monograph of an Immigrant Group*. Boston: Richard G. Badger, The Gorham Press.

Tylkowa, D. (ed.) (2000) *Podhale: tradycja we współczesnej kulturze wsi (Podhale: Tradition in Contemporary Rural Culture)*. Kraków, Warszawa: Wydawnictwo Instytutu Archeologii i Etnologii PAN.

EMESE ÉVA ANGYAL AND ZITA FELLNER *

How are Online and Offline Political Activities Connected? A Comparison of Studies

Intersections.EEJSP
6(2): 81–98.
DOI: 10.17356/ieejsp.v6i2.649
http://intersections.tk.mta.hu

* [angyal.emese.eva@gmail.com] (Doctoral School of Sociology, Corvinus University of Budapest); [zitafellner@gmail.com] (Doctoral School of Economics, Corvinus University of Budapest; Central Bank of Hungary)

Abstract

In general, political participation means all the action of citizens that has the aim or the effect of influencing government or politics. Studies argue that media consumption and political participation are correlated: offline and online political participation affect each other. Knowing the relationship between online and offline political activity can improve estimations of offline political events based on social media data.

By comparing these empirical results, in this study we investigate whether social media usage reinforces or weakens the willingness to become involved in a demonstration or other offline political activity. Numerous studies have already attempted to measure this effect, with contradictory findings related to the direction and volume of the latter.

We explore this connection by synthesizing recent empirical political science papers. For this purpose, we compare the results of the former using Bayesian updating – a tool for comparing studies regardless of their methodology or data collection method. This method of data analysis is also insensitive to the operationalization of either the dependent or the explanatory variables.

Based on the aforementioned studies, our results prove that online political activity has a significant positive effect on offline political activity, in spite of the fact that some research has found an insignificant connection.

Keywords: *political participation, Bayesian updating, online political activity, offline political activity, social networking sites.*

1. Introduction

The links between patterns of social media usage and civic engagement have been investigated since the early 2000s. Movements have used social media to organize political demonstrations or other initiatives, and political parties have represented themselves to connect with voters. In 2008, during the elections in the United States, social media became for the first time the main tool used in a political campaign, and since then the impact of the platform has been subject to scientific debate.

Does a 'like' count as a form of political activity? Is pressing the 'share' button on a social network site as valuable as participating in a demonstration? Can the number of followers predict the number of voters at upcoming elections?

Our aim in this article is to examine a sample of earlier studies related to this scientific debate, and to compare their results in order to answer the question they all raise: Does online political activity reinforce or substitute offline political action?

Our method is an investigation of recent studies about the relationship between online and offline political participation. Researchers are debating what effect online media has on citizens regarding their political activity. Causal relationships have been found, and there are also articles on the positive and negative effects of online media. Noting the currency of the topic, the studies have employed various methods: surveys, experiments, panel methods, etc. To overcome the methodological challenge of their analysis, we use Bayesian updating instead of meta-analyses to compare studies. Meta-analysis can help with summarizing the findings of different articles, but it can only be applied to research with the same research design. Bayesian updating, however, can be used to compare studies regardless of their methodology and sample: it permits the comparison of studies with different research designs and methods.

We collected studies that were designed to answer the same questions regarding specific social media sites, and which compared various forms of participation, both online and offline.

All studies used in the analysis were published in English between 2009 and 2019, as we sought to include the latest results from the relevant literature, but also to employ a relatively narrow time interval in which the results could still be compared. We collected those articles that reported the detailed results of a regression analysis (i.e. that at least estimated regression coefficients and their standard errors), as this is necessary for conducting Bayesian updating.

After comparing the research in terms of the different research designs, we found that online political participation does have a significant effect on offline political action. We note that the method might be biased due to studies with more robust statistical results. In the last section of the paper, we investigate possible criticism of the results we present and discuss further questions.

2. Literature review

2.1 Social media and civic engagement

Since the dawn of internet use, researchers have attempted to explain its effect on people's behavior and the offline world. Patterns of internet usage were associated with socio-economic status and social capital early on, and, based on increased access to information about civic and political topics, scientists predicted greater involvement in politics (Skoric and Zhu, 2015). Internet use widens the scope of interaction with public affairs and thus may improve citizens' knowledge about political issues (Skoric et al., 2016), and have a positive effect on civic engagement through the provision of political news (Boulianne, 2009). Social media has changed the patterns of internet usage and their impact on civic engagement, as it has facilitated political engagement by making the latter personalized and more independent of traditional organizational rules (Bennett and Segerberg, 2012). Engaging in politics on social media does not require individuals to identify themselves with a specific party or movement, thus gives space for individualized political content. In this way – according to Bennett and Segerberg's (2012) theory of connective action – not only has the platform for interaction changed, but the type of activity too: for example, instead of organized, strong-tie-based action, weak ties and personal experiences now predominate in movements.

Using Bennett and Segerberg's framework, Skoric et al. (2016) argue that social media sites represent a new opportunity for debating and discussing political topics, which may lead to changes in behavior. They argue that communicative actions may predict civic engagement, and that social media has become part of the repertoire of communicative action.

2.2 Political participation

Political participation can be any activity that is intended to or has the consequence of affecting, either directly or indirectly, government action. It can happen offline, in traditional forms – participating at demonstrations, contacting members of the government, signing a petition, etc. – or, as has become more common in the last few decades, via online platforms, e.g. on social network sites. Political campaigns and parties have used these platforms for years now, but the causal relationship between online and offline political participation is still subject to scientific debate: the question is whether online activities such as social media usage mobilize or facilitate the spread of information in societies, or rather replace offline action. Knowing the relationship between online and offline political activity can help improve appraisals of offline political events based on social media data, which is available in vast quantities. However, making direct predictions solely based on these types of data is often misleading.

Earlier research has used different methodological approaches to predict political events in relation to social media activities and thus resulted in a variety of findings. One technique commonly used to estimate the offline popularity of a

political party (for example), is examining its online popularity (in the form of number of 'likes,' 'shares,' or 'followers' on the related pages, etc.) by applying weights to balance the dissimilarity between the total population and the set of users. This approach has been successfully used in some cases – weighted social media data analyses led to valid estimations of the 2016 US elections results –, but it can usually only be applied under specific conditions. However, there is no general consensus regarding how to use data from such sites.

Political participation can be defined according to the widely used definition of Verba et al. (1995) as 'activity that is intended to or has the consequence of affecting, either directly or indirectly, government action.' This definition is used in studies about online participation as well – for example, in Teocharis and Lowe (2015).

A range of different studies have used various methods to estimate political outcomes from online participation, although these have mostly been empirical studies. Fewer theories have emerged to model the link between social media usage and electoral behavior. Koltai and Stefkovics (2018) introduced two of these: the analytical approach of Strandberg (2006), and a network-based approach based on Bene's (2018) work.

2.3 Analytical approach

Strandberg's analytical approach differentiates four possible outcomes from online activities. From the perspective of political actors, online campaigns can replicate offline activities (normalization), or can equalize offline social differences (equalization). Citizens can expect social media to increase publicity and produce more information (mobilization), and may reflect their offline activity (reinforcement). Strandberg analyzed the Finnish election of 2011 and showed that political actors' social media use has normalization effects, while in the case of voters slight evidence of mobilization was found.

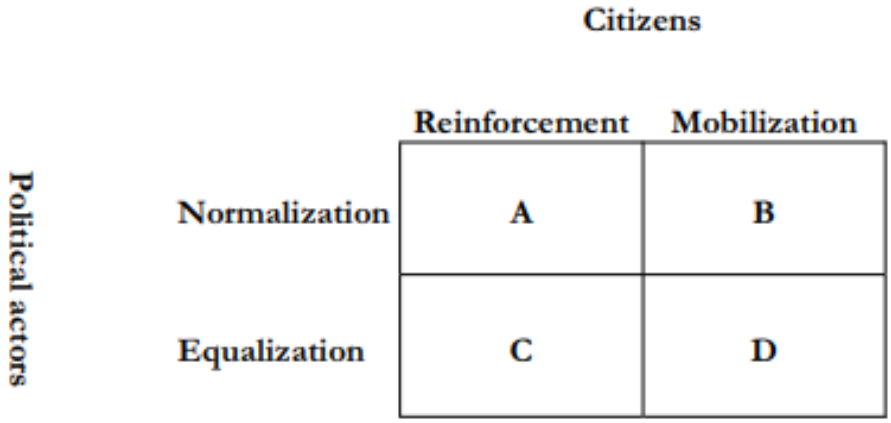


Figure 1: Strandberg's (2006) typology about the four political environments. Source: Strandberg, 2006.

2.4 Two-step flow theory

Bene (2018) found that the main effect of Facebook posts on political participation is connected to the sharing of content. His results showed that the average number of shares on candidates' Facebook pages was positively associated with electoral outcomes during the Hungarian elections in 2014, while other Facebook performance indicators (numbers of average likes and comments) were not significantly associated with electoral outcomes. 'These findings suggest that a social media campaign can result in extra votes through a two-step flow effect: The extra votes are likely to come from voters who get candidates' messages mediated by their friends and who otherwise would not see the given content' (Bene, 2018: 12).

3. Articles

The effect of online political participation on offline activity is still under debate. Studies that use different samples and methodology have investigated this connection. Here, we separately introduce 14 articles that use the concept of social media and offline political activity, the aim being to determine the connections between them. In these 14 articles, 17 models provide the basis for our analysis.

1. *Vissers and Stolle (2012)*

The analysis utilizes survey data about various forms of offline and online political engagement among undergraduate students.

Data were collected in Canada, 2011 through a survey among university students during a federal election campaign. An online questionnaire was sent to all university students, of whom 1088 completed it. Online political activities involved signing or collecting petitions online, contacting a politician or government official, donating money, and boycotting. The variable that measured offline participation was based on offline activities such as boycotts, signing paper-based petitions, demonstrations, and making personal contact with a politician.

2. *Skoric and Zhu (2015)*

The authors used assisted telephone interviews to investigate the behavior of a sample of eligible Singaporean voters in this post-election survey in 2014. The final response rate was 19 per cent.

The results suggest that social media can be used as an indicator of offline political participation: those who read news about politics via Facebook were more likely to participate in the forms of offline action that were specified than those who did not. Those who were involved in this type of media use were more likely to participate in resident dialogues and help political parties than those who did not. The independent variable in this analysis was 'expressive media use': this incorporated three different offline political activities: attending a rally, participating in resident dialogue, and volunteering for a political party.

3. *Teocharis and Lowe (2015)*

This study describes an experiment undertaken in Greece, 2011. For the experiment, data were collected from 200 people aged 18–35 years (50 per cent

female, 50 per cent male) who did not have a Facebook account. The participants were recruited using random digit dialing and were contacted from September 2011 to March 2012. The treatment group contained 120 participants, while the control group contained 80. Members of the control group were asked not to create a Facebook account during the time of the experiment.

The aim of this study was to examine the causal relationship between Facebook use and political participation, as the authors argue that previous studies – which have found a positive relationship –mainly rely on cross-sectional data. The results suggest that maintaining a Facebook page negatively affects political participation.

4. *Holt et al. (2013)*

This study investigated the impact of social media use for political purposes and attention to political news in traditional media on political interest and offline political participation. The study was based on panel data and designed to reveal causal relationships. Social media usage was measured by principal component analysis and included six activities: reading a blog about current affairs or politics, writing texts on a personal blog about current affairs or politics, commenting/discussing current affairs issues or politics on the internet, and following a politician or political party on either Twitter, Facebook or YouTube. The dependent variable was an index based on offline political activities such as visiting a campaign rally, attending a political meeting, contacting a politician, trying to convince others to vote for a specific party, etc.

The authors' hypothesis was that social media can mobilize younger citizens, while traditional media mobilizes older citizens. Results showed that using social media for political purposes does have a positive influence on political interest and offline political participation in a similar way to paying attention to political news in traditional news media.

5. *Dimitrova et al. (2014)*

This study was also inspired by research that has suggested a positive relationship between digital media use and political participation and knowledge. The research was designed to identify causal correlations using panel data. Two panel studies were conducted during the 2010 Swedish election campaign. Samples for both surveys were drawn using stratified probability sampling from a database of approximately 28,000 citizens from Synovate's pool of web survey participants. The dependent variable (offline political activity) was measured by an index of engagement in different political activities such as attending a demonstration, contacting a politician, and visiting a campaign rally. Social media use was measured by an index that used six survey items that focused on the political use of social media, such as reading or writing blogs with political news.

The authors' findings were that consuming online news had no effect on offline political participation during the campaign, while social media use had the strongest impact.

6. *Feezell et al. (2012)*

The authors used a multi-method survey of 425 undergraduate students to investigate the correlation between political activity and political knowledge and

being a member of a Facebook group. The independent variables included a self-reported answer about how many political groups the respondent was a member of, the intensity of Facebook usage, and an index based on several questions about how often respondents read and post messages. The dependent variable was a composite scale of ten forms of offline political participation. Results showed that participation in online political groups is strongly correlated with offline political participation.

7. *Valenzula et al. (2009)*

In this article, the authors investigate whether the use of social media is correlated with individual social capital. The data used for the research were based on a random web survey of higher education students, and the goal was to test the correlation between Facebook usage and political participation. Civic and political participation were measured using an index based on respondents' involvement in different activities. Respondents were asked whether they had worked in or volunteered for a community project; had worked or volunteered for nonpolitical groups such as a hobby club, environmental group, or minority student association; had raised money for charity or ran/walked/biked for charity; had worked or volunteered for political groups or candidates; voted in a local, state, or national election; tried to persuade others in an election; signed a petition; worn or displayed a badge or sticker related to a political or social cause; or deliberately bought specific products for political, ethical, or environmental reasons.

The analysis showed a positive correlation, but the association was so weak that the authors concluded that social media might not be sufficient to encourage people to participate in politics or in civic life.

8. *Kim et al. (2016)*

The research described in this article was designed to identify online activities that are connected to political participation. The authors used national survey data to examine the effect of social media on political involvement. Social media usage was defined as 'SNS (Social Networking Sites) Activities Regarding Political Issues' and was measured by the frequency of political posting, political posting by friends, and experiences with excluding others from one's own groups on social network sites because of political issues. Offline political activity was defined in this study as 'Offline Political Talk,' measured in terms of the frequency respondents talked about politics or current affairs with friends and family.

Results suggested that social networks used for political purposes predict the level of political participation.

9. *Strömbäck et al. (2017)*

Approaching social media usage as a part of the news repertoire of individuals, this article used two-wave panel data collected during a 2014 Swedish campaign to examine how media use influences political participation. The study analyzed the relationship between different forms of media use and political participation. While more media consumption was found to be positively correlated to civic engagement, the finding was that social media news consumers are more likely to participate in politics offline. Online and offline participation were both measured using the question: 'During the past month, have you done

the following…' Items included visiting a website of a political party/youth organization; reading a blog about politics and society; writing texts about social and political issues on a personal blog; commenting on or discussing issues related to politics and society online; and following any politician or political party via Twitter, Facebook, Youtube, or Instagram. Nine items were asked about regarding offline political participation: signing a petition; contacting a politician; writing a letter or a debate article for a newspaper or on the internet; arguing for one's views in a political discussion; contacting mass media; attending a demonstration or a political meeting; and trying to convince others to vote for a particular party.

10. Lane et al. (2017)

Based on two-wave panel survey data collected in the United States in 2012, this study examined the effect of social media political information sharing on offline political participation.

11. Krongard and Groshek (2017)

The authors investigated the effect of streaming on behavior. Alongside this, they tested engagement in politics and participation linked to typical forms of use of social media, finding that the relationship was positive and significant. The data for this cross-sectional analysis were collected through a representative national online panel. The independent variable social media usage was constructed based on the frequency of seven activities: posting personal experiences related to politics or campaigning; friending or following a political actor; receiving messages from parties or politicians; posting or sharing thoughts or media such as photos, videos or audio content about current events or politics; forwarding someone else's political commentary; and arguing with someone on SNS who has different political views. Offline political participation was measured by the frequency of engaging in activities such as making a campaign contribution; signing up to volunteer for a campaign or issue; subscribing to political lists; attending public hearings, town hall meetings, and political rallies, etc.

12. Tai et al. (2019)

This study defined 'e-participation' as a form of information and communication technology usage whereby people engage in public affairs and democratic processes. It was used to construct an index that measures diverse online political activities. The analysis underlined the hypothesis that 'the more types of political activities individuals engage in online, the greater their political participation offline.' Data were collected from a random national sample via telephone interviews. Offline participation was measured with an index based on similar items to the other studies: respondents were asked whether they had engaged in different activities such as attending political rallies, speeches or organized protests, etc., in the past 12 months.

13. Towner and Munoz (2016)

Focusing especially on 'boomers,' this study tested the effect of online media on participation compared to traditional media consumption. The dependent variable offline participation was constructed using an index based on five items. Respondents were asked whether they had talked to anyone about politics; attended political meetings or rallies; worn a campaign button; worked for a party

or candidate; or given an offline donation. Online participation was defined by eight items: signing an email or web petition; forwarding a political email; talking to anyone about politics; contacting a government official online; following a candidate on a SNS; posting a comment or weblink; participating in online discussion; and giving an online donation. The results showed a positive correlation between Facebook usage and offline political participation.

14. Zuniga et al. (2016)

This study aimed to test the relationship between online social capital and offline political capital. Part of this analysis involved testing the effect of social media on offline participation: results showed that social media social capital has a different effect on offline participation as it may encourage participation in demonstrations, but has a negative relationship with voting.

Six questionnaire items measured online participation: frequency of signing or sharing a petition; participating in question-and-answer sessions with a politician or public official; creating an online petition and signing up online to volunteer to help with a political cause; using a mobile phone to donate money to a campaign or political cause via text message or app; and starting a political or cause-related group on a social media site. Offline participation was defined in this study using items that measured the frequency of involvement with political groups or campaigns; participating in social movement groups; donating money to a campaign or cause; attending a protest; and attending a political rally.

4. Research question and hypothesis

There are multiple competing hypotheses in the literature concerning whether online activities support offline political participation in general. Empirical research has tested this factor over time, but no consensus has been reached regarding the effect of online political participation on offline political participation. The research question behind all the theories is similar, as it is in this study:

RQ: What kind of correlation exists between online political activities and offline political participation?

This article uses the definition of online and offline political activities as introduced above in the general literature. To answer the research question, this study compares articles that examined the correlation between the phenomena defined in the same way. The hypothesis – based on the articles – is that a positive correlation exists between the latter factors:

H: Online political activities – such as social media usage – increase offline political participation.

To test this hypothesis, we analyzed articles that aimed to investigate the causal relationship between online and offline political participation; however, most of the studies used cross-sectional survey data that limited the possibility to examine causality.

5. Data and method

To permit the inclusion of articles with different research designs, our analysis applied Bayesian updating in the comparison. The analysis includes 17 models from 14 articles published between 2009 and 2019. The choice of time interval is justified by the fact that we wanted to include the latest results, but also to investigate a period during which the results could still be compared. For this reason, we chose the post-2008 period. We were able to include in our analysis only those articles that displayed the detailed results of their regression analyses; i.e., the estimated regression coefficients and related standard errors, because these are necessary inputs in Bayesian updating. All the articles investigated the relationship between social media usage and offline political activities.[1] During this ten-year period, major changes in the use of social media occurred, but all the studies defined political activity – online and offline – similarly, so comparing them was considered reasonable, despite the variety of methods that were applied.

As mentioned above, much research has been devoted to investigating the relationship between internet use and political participation. In general, results have been positive; meta-analytical research examining the effect of the internet on political participation has found weak or modestly positive relationships between its use and offline political participation (Boulianne, 2009; Skoric et al., 2016). While meta-analyses can compare studies with similar research designs, the results are based on self-reported data. However, different studies have used different methodologies and samples to test this relationship.

6. Analysis of the articles

The articles presented above found that there are still parts of the relationship between online and offline political participation that are under debate. An analysis from 2004 by Pew Internet and American Life showed that reading online news and online political discussions is positively related to the probability of voting (Dimitrova et al., 2014). Other studies found that the strongest predictor of offline political participation is expressive online participation among a purposive sample of blog readers. Studies have also found that some online activities are associated with offline political participation. Some previous studies, however, have failed to demonstrate the tangible impact of digital media on participation. For instance, Groshek and Dimitrova (2011) found no significant impact of social media use on voting intentions in the 2008 US presidential election. Zhang et al. (2010) found that reliance on social networking sites had no effect on political participation, although it was significantly related to civic participation.

[1] In our research we could not make a distinction between effects on institutional and non-institutional political participation (Kaase and Marsh, 1979). The main reason behind this is that the empirical research conducted in the field is inconsistent in its treatment of this distinction, probably due to research design obstacles. Thus the underlying assumption in our empirical analysis is that online political activity has the same effect on both types of offline political participation.

The Bayesian updating method can be used to compare studies with different research designs using their regression parameter estimates and related standard errors. Table 1 includes a summary of the articles discussed above.

Table 1: Summary of studies. Source: Authors' compilation.

t	Model t	Parameter estimation	Standard error
01	Visser-Stolle (2012)	0.17	0.049
02	Skoric- Zhu (2015)	0.05	0.21
03	Skoric- Zhu (2015)	0.06	0.28
04	Skoric- Zhu (2015)	-0.04	0.12
05	Teocharis-Lowe (2015)	-0.192	0.198
06	Teocharis-Lowe (2015)	-0.208	0.17
07	Holt et al (2013)	0.20	0.03
08	Dimitrova et al (2014)	0.20	0.02
09	Feezell et al (2016)	2.742	1.334
10	Valenzula et al (2009)	0.01	0.03
11	Kim et al (2016)	0.56	0.14
12	Strömbäck et al (2017)	0.6	0.1
13	Lane et al (2017)	0.03	0.04
14	Krongard - Groshek (2017)	0.331	0.034
15	Tai et al (2019)	0.212	0.027
16	Towner - Munoz (2016)	0.029	0.071
17	Zuniga et al (2016)	-0.03	0.024

As noted earlier, the regression parameter that captures the effect of online participation on offline participation is positive in the majority of the models. However, in some cases these estimated values do not differ. In the next section, we briefly introduce the methodology we used, followed by our findings about the overall effect of online political participation.

7. Method and analysis

In this section, we describe how the Bayesian updating method was applied to the 17 models used in the 14 studies listed above. Each study investigated whether online participation has a significant effect on offline political participation.

To do this, we introduce Bayesian updating according to Kuiper et al. (2012). The purpose of this method is to quantify evidence about multiple studies in

relation to the same theoretical concept. In this case, the analysis aims to summarize research about the effect of online political activity on offline participation.

Since the studies use different research designs, meta-analyses cannot be used. Bayesian updating combines evidence for the positive, negative , and null effect of the predictor of interest – in this case, online participation – on the dependent variable, which is offline participation in this case. The method can be employed to evaluate the hypotheses:

H_0: null effect

$H_>$: positive effect

$H_<$: negative effect

The method uses Bayes Factors (BF) to test the evidence for each hypothesis. The result is a likelihood ratio (LR) test that shows how likely the hypotheses are to be valid in relation to each other.

In investigating the hypotheses, the parameter estimates of the T studies $(\hat{\beta}_1^t)$ and the standard errors $(\hat{\sigma}_{\hat{\beta}_1}^t, t = 1, \dots, T)$ are necessary. This method does not combine the estimates but summarizes the evidence for the hypotheses.

Steps involved in Bayesian updating:

1. Assume that the three hypotheses (H_0, $H_>$, $H_<$) are equally likely, so prior probabilities (denoted with $\pi_0^0, \pi_>^0, \pi_<^0$ respectively) are 1/3.
2. Calculate the likelihood by using the first study's parameter estimate and standard error.
3. Based on the likelihood, the Bayes Factors can be determined ($BF_{>u}^1, BF_{<u}^1$), which shows how much more support a hypothesis has versus an unconstrained hypothesis concerning the parameter of interest.[2]
4. Based on prior probabilities and Bayes Factors, posterior model probabilities can be determined (denoted with $\pi_{1,0}^1, \pi_{1,>}^1, \pi_{1,<}^1$ respectively), which show the probability of each hypothesis based on the first regression.
5. These posterior model probabilities are treated as prior probabilities of the hypotheses when we move on to the second study. Based on these, posterior model probabilities can be calculated for the second regression.
6. This process is repeated for each study shown in Figure 2. At the last step, one generates the posterior model probabilities, wherein all the information from the T studies is incorporated (these are $\pi_{T,0}^1, \pi_{T,>}^1, \pi_{T,<}^1$ respectively).

[2] The hypothesis without constraints on the parameter of interest functions only as a technical device.

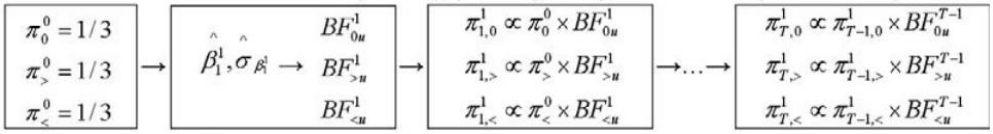


Figure 2: Process of Bayesian Updating. Source: Kuiper et al (2012).

Formally, the method can be read about in Kuiper et al. (2012). The main principles are as follows.

In the case of regression modelling, the dependent variable is a function of the explanatory variables. From all the independent variables used in the models under review, our main concern is with those that denote the marginal effect of the theoretical concept that is to be tested. In our example, the underlined variable is the one that captures the effect of online political participation.

As we mentioned above, it is not necessary to use homogeneous models in terms of design (cross-sectional- and panel-survey-based experiments can be analyzed together), data collection, or regression specification. All that is needed is the estimated effect and its uncertainty – namely, the regression coefficient and its standard error, on which the partial significance tests (t-tests) are based in inferential statistics.

With these two inputs, we can estimate the likelihood functions for the parameter of interest; that is, following a normal distribution with the mean of the parameter estimation and the variance of the square of the standard error of the parameter estimation. For the hypothesis testing of H0, H>, H< we use conjugate priors, thus we ensure that the distribution of parameters is normal.

We determine the prior distributions of the parameters in the case of each of the three hypotheses, which are proportional to the normal distribution mentioned above if the parameter does not contradict the concrete hypothesis.

A priori, we assume that all three hypotheses are equally likely, thus the parameter equals zero. Consequently, the prior confirms H> in 50 per cent of cases, and H< in 50 per cent of cases. The variance of the prior should be determined as it should become a noninformative prior. For this purpose, we produce the 99 per cent confidence intervals for all the studies under review, and based on these we create the 99 per cent credibility interval for the regression parameter.

The posterior probability is proportional to the product of the prior and the likelihood. To define the posterior distribution for each hypothesis, we create the unrestricted posterior distribution function of the parameter.

After that, Bayes Factors are computed. Bayes Factors show the level of support of a hypothesis compared to other hypotheses in the form of the ratio of the marginal likelihood of each hypothesis. In line with the Bayes Factors, posterior model probabilities can be defined that indicate the relative support of a specific hypothesis in relation to a finite set of hypotheses (of which there are three in number).

The main principle of Bayesian updating is that, in the first step, we can use uninformative priors for computing posterior model probabilities. However, after this step, for all other model t we can use the posterior model probabilities of

model t-1 as prior probabilities. It can also be shown that the order of the models does not have any effect on the results that denote the posterior model probabilities for the last model (model T); i.e. the probability of each hypothesis regarding all the information from the models under review.

In this study we test whether online political participation

H_0: does not have an impact on offline political participation;

$H_>$: affects positively offline political participation;

$H_<$: affects negatively offline political participation.

For the analysis, we used Kuiper's R code (2012). To test these hypotheses, the 99 per cent confidence intervals of the estimated regression parameters first needed to be determined (Figure 3).

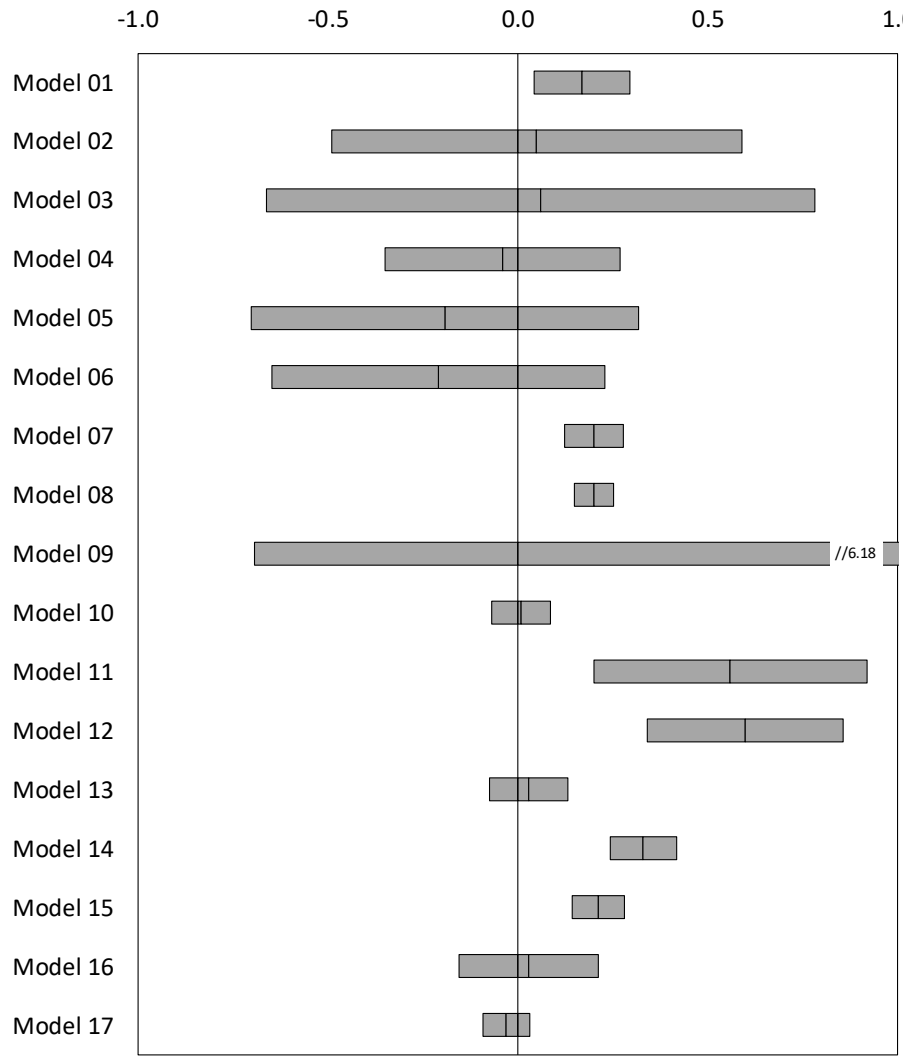


Figure 3: Ninety-nine per cent confidence intervals for β_1. Source: Authors' calculations.

After updating the uninformative prior probabilities with the 17 model estimations mentioned earlier, the Bayesian updating method provides clear evidence for the positive impact of online political participation on forms of offline participation (Table 2). The posterior model probability of $H_>$ hypothesis is 1, while that of $H_<$ hypothesis is 0, and for H_0 hypothesis it is also practically 0. Thus, the overall effect seems to be positive with respect to the studies and regressions we analyzed. As the study involved performing a sensitivity analysis related to the value of σ_0^{T2}, one can see that the results do not vary significantly: $H_>$ hypothesis is preferred in both cases. The results are stable, otherwise we would be inclined to collect other studies for inclusion in further analyses.

Table 2: Posterior model probabilities for study T (T=17)
Source: Authors' calculations.

	$\frac{1}{2}\sigma_0^{T2}$	σ_0^{T2}	$2\sigma_0^{T2}$
H_0	1.96E-69	6.46E-72	2.97E-72
$H_>$	1.00E+00	1.00E+00	1.00E+00
$H_<$	0.00E+00	0.00E+00	0.00E+00

8. Conclusion

Regarding the correlation of online and offline political participation, most of the related literature shows a positive relationship, with only a few statistically insignificant positive or negative results having been reported. This in itself suggests a positive correlation, but the emphasis on the theoretical importance of the question in the ongoing debates cannot be ignored. For the research for this paper, we identified recent articles that tried to quantify the effect of online political activity on offline political participation. The results of the collected analyses were synthesized using the Bayesian updating method due to its insensitivity to research design, the method of sampling or data collection, and the regression specification of the models under review. Our results suggest that the outcomes of the related articles prove the positive effect hypothesis; that is, online political activity is positively correlated to offline political activity. This conclusion is in line with the theoretical concepts presented in Section 2.

It should also be mentioned that social media data analyses are associated with various methodological challenges. Different social media sites have different structures and different audiences: the demographic distribution of site members does not necessarily represent the distribution of the wider population – youngsters are overrepresented; thus, most information concerns them. Also, the usage of these sites is different according to countries and cultures.

Collecting studies in this field can be also challenging. Most of the studies we identified are based on self-reported data and are from different countries (U.S., Sweden, Singapore, etc.). We were not able to include articles in the research that did not publish the estimated regression parameters and their numerical standard errors, which poses obvious limits to the set of studies available for analysis. As more research is forthcoming in this field, later results may be analytically synthesized – perhaps with respect to different geographical, cultural , or time horizons – to better appraise the relationship between online and offline political participation using a wider dataset.

References

Bene, M. (2018) Post shared, vote shared: Investigating the link between Facebook performance and electoral success during the Hungarian general election campaign of 2014. *Journalism & Mass Communication Quarterly, 95*(2): 363–380. https://doi.org/10.1177/1077699018763309

Bennett, W. L. and Segerberg, A. (2012) The logic of connective action. *Information, Communication & Society* 15 1–30. https://doi.org/10.1080/1369118x.2012.670661

Boulianne, S. (2009) Does Internet use affect engagement? A meta-analysis of research. *Political Communication, 26*(2): 193–211. https://doi.org/10.1080/10584600902854363

Dimitrova, D. V., Shehata, A., Strömbäck, J. and Nord, L. W. (2014) The effects of digital media on political knowledge and participation in election campaigns: Evidence from panel data. *Communication Research, 41*(1): 94–118. https://doi.org/10.1177/0093650211426004

Feezell, J. T., Conroy, M. and Guerrero, M. (2016) Internet use and political participation: Engaging citizenship norms through online activities. *Journal of Information Technology & Politics, 13*(2): 95–107. https://doi.org/10.1080/19331681.2016.1166994

Groshek, J. and Dimitrova, D. (2013) A cross-section of voter learning, campaign interest and intention to vote in the 2008 American election: Did Web 2.0 matter? *Atlantic Journal of Communication, 21*(2): 108–124. https://doi.org/10.1080/15456870.2013.773484

Holt, K., Shehata, A., Strömback, J. and Ljungberg, E. (2013) Age and the effects of news media attention and social media use on political interest and participation: Do social media function as leveller? *European Journal of Communication, 28*(1): 19–34. https://doi.org/10.1177/0267323112465369

Kaase, M. and Marsh, A. (1979) Political action: A theoretical perspective. In Barnes, S. and Kaase, M. (eds.) *Political Action: Mass Participation in Five Western Democracies*. London: Sage. 27–56.

Kim, T., Atkin, D. J. and Lin, C. A. (2016) The influence of social networking sites on political behavior: Modeling political involvement via online and offline activity. *Journal of Broadcasting & Electronic Media, 60*(1): 23–39. https://doi.org/10.1080/08838151.2015.1127242

Kim, Y., Russo, S. and Amnå, E. (2016) The longitudinal relation between online and offline political participation among youth at two different developmental stages. *New Media & Society, 19*(6): 899–917. https://doi.org/10.1177/1461444815624181

Koltai, J. and Stefkovics, Á. (2018) A big data lehetséges szerepe a pártpreferencia-becslésekben magyarországi pártok és politikusok Facebook-oldalainak adatai alapján (The possible role of Big Data in predicting party preferences based on the Facebook pages of Hungarian political parties and politicians). *Politikatudományi Szemle, 27*(2): 87–120. https://doi.org/10.30718/poltud.hu.2018.2.87.120

Krongard, S. and Groshek, J. (2017) Streaming entertainment and talking politics: Social television in the shaping of online and offline political talk during the 2016 campaign. In Schill, D. and Hendricks, J. A. (eds.) *The Presidency and Social Media: Discourse, Disruption, and Digital Democracy in the 2016 Presidential Election.* New York: Routledge. 123–140. https://doi.org/10.4324/9781315112824-7.

Kuiper, R. M., Buskens, V., Raub, W. and Hoijtink, H. (2012) Combining statistical evidence from several studies: A method using bayesian updating and an example from research on trust problems in social and economic exchange. *Sociological Methods & Research, 42*(1): 60–81. https://doi.org/10.1177/0049124112464867

Lane, D. S., Kim, D. H., Lee, S. S., Weeks, B. E. and Kwak, N. (2017) From online disagreement to offline action: How diverse motivations for using social media can increase political information sharing and catalyze offline political participation. *Social Media + Society, 3*(3): 1–14. https://doi.org/10.1177/2056305117716274

Skoric, M. and Zhu, Q. (2015) Social media and offline political participation: Uncovering the paths from digital to physical. *International Journal of Public Opinion Research, 28*(3): 415–427. https://doi.org/10.1093/ijpor/edv027

Skoric, M., Zhu, Q., Goh, D. and Pang, N. (2016) Social media and citizen engagement: A meta-analytic review. *New Media & Society, 18*(9): 1817–1839. https://doi.org/10.1177/1461444815616221

Strandberg, K. (2006) *Parties, Candidates and Citizens On-line: Studies of Politics on the Internet.* Pargas: Åbo Akademi University Press.

Strömbäck, J., Falasca, K. and Kruikemeier, S. (2017) The mix of media use matters: Investigating the effects of individual news repertoires on offline and online political participation. *Political Communication, 35*(3): 413–432. https://doi.org/10.1080/10584609.2017.1385549

Tai, K.-T., Porumbescu, G. and Shon, J. (2019) Can e-participation stimulate offline citizen participation: An empirical test with practical implications. *Public Management Review, 22*(2): 278–296. https://doi.org/10.1080/14719037.2019.1584233

Teocharis, Y. and Lowe, W. (2015) Does Facebook increase political participation? Evidence from a field experiment. *Information, Communication & Society, 19*(10): 1465–1486. https://doi.org/10.1080/1369118x.2015.1119871

Towner, T. and Munoz, C. L. (2016) Boomers versus Millennials: Online media influence on media performance and candidate evaluations. *Social Sciences, 5*(4): 56. https://doi.org/10.3390/socsci5040056

Valenzuela, S., Park, N. and Kee, K. F. (2009) Is there social capital in a social network site? Facebook use and college students' life satisfaction, trust, and participation. *Journal of Computer-Mediated Communication, 14*(4): 875–901. https://doi.org/10.1111/j.1083-6101.2009.01474

Verba, S., Lehman Schlozman, K. and Brady, H. E. (1995) *Voice and Equality: Civic Voluntarism in American Politics.* Cambridge, MA and London: Harvard University Press.

Vissers, S. and Stolle, D. (2014) Spill-over effects between Facebook and on/offline political participation? Evidence from a two-wave panel study. *Journal of Information Technology & Politics, 11*(3): 259–275. https://doi.org/10.1080/19331681.2014.888383

Zhang, W., Johnson, T., Seltzer, T. and Bichard, S. (2010) The revolution will be networked: The influence of social networking sites on political attitudes and behavior. *Social Science Computer Review, 28*(1): 75–92. https://doi.org/10.1177/0894439309335162

Zuniga, H. G., Barnidge, M. and Scherman, A. (2016) Social media social capital, offline social capital, and citizenship: Exploring asymmetrical social capital effects. *Political Communication, 34*(1): 44–68. https://doi.org/10.1080/10584609.2016.1227000

Book Review

Karin Wahl-Jorgensen (2019) *Emotions, Media and Politics.* Cambridge: Polity Press. 220 pages.

Research on emotions has been experiencing a renaissance since the nineties and has become a 'hot topic' of scientific interest (Evans, 2001), formulating an interdisciplinary field which social sciences now take into consideration. The so-called 'emotional turn' has also taken place in human sciences, thus in the last decades emotions have been in the focus of sociology, cultural anthropology and political sciences. *Emotions, Media and Politics* tries to react to the emotional turn, and it finds that emotions matter to mediated politics. Actually, they do not simply matter, but they matter a lot.

Despite the fact that contemporary culture is often depicted as 'emotional culture', and we can witness an emerging centrality of emotion in society, emotion sometimes 'could be seen as an epistemological elephant in the room' (p. 167). However, its 'unspoken presence' (p. 167) determines our life in many ways: emotions are everywhere, and they can be easily found in (mediated) politics as well. This omnipresence is not good or bad, but it is a satisfactory reason why emotions have to be considered 'as an integral part of any explanation of what it means to be engaged by, participate in and make decisions about politics' (p. 172). This statement means an explicit turning away from the theory of deliberative democracy, in which the decision-making process is always rational and never involves the emotional dimension.

The book is structured into seven main chapters, plus an introductory and a concluding chapter. In the first two chapters the author positions emotions in (mediated) politics and in journalism. The point of departure is the assumption of radical democrats', that is, 'political brain is an emotional brain' (Westen, 2007: xv). On the one hand, there is a process of informalization of political life, and emotions can be seen as important expressive forms and tools of contemporary politics. On the other hand, the role of emotions is also seen as a key factor in shaping the practices of journalism. Nowadays emotions are taken into account in high quality journalism as well, and the so-called 'strategic ritual of objectivity' (p. 38) shifted into the 'strategic ritual of emotionality' (p. 44). Good storytelling inherently involves emotions, because emotions can make social and political issues easily visible, and they can elicit compassion in audiences. So, there is no journalism without emotions and there is no politics without emotions, and that is why emotions need to be studied in the context of mediated politics as well.

Chapter three demonstrates why personalized storytelling is so crucial in political life. Personalized storytelling can be considered as some kind of emotional talk, by which politicians can make connections between private and public. Personalized storytelling makes the politician authentic in the eye of the public, and it creates an emotional bond between the politician and the audience. This communication form can be useful from the 'other side' as well, because it elicits

compassion oriented towards the creation of communities which want to achieve social and political change.

After having focused on the role of emotions in mediated politics generally, the book moves on to exploring particular emotions. Two chapters are dedicated to anger as a central political emotion, and one chapter deals with the 'the politics of love', more specifically with the phenomenon of political fandom.

According to the author, anger is first and foremost 'performative, discursively constructed, collective and political' (p. 92). In order to give a more comprehensive analysis of this typology, the book studies protest coverage and it finds that anger bolsters engagement in political activity. Another important statement of the book is that: 'mediated anger is always-already political' (p. 108), because it allows us to express our collective grievances. In chapter five the author applies this idea to the case of the Donald Trump's 'angry populism',[1] while the studied emotion is connected with the notion of 'emotional regime' (Reddy, 2001). The main strength of the book is that it introduces the concept of emotional regime, because with this act it emphasizes that emotions are not just working on the individual level and circulating in individual bodies, but they have collective and constructed nature, too. The author proposes that there was a shift in emotional regimes, and after Obama's presidency a new regime, the angry populism was born. The chapter also examines Trump's angry populism in the coverage of anger from the 2016 US presidential election to Trump's first 100 days in office. This examination shows that angry populism is being mediated and anger has played a crucial role in Trump's ascent, it became a real political force 'on its own right' (p. 17). Furthermore, the chapter suggests the complexity of this emotion, i.e. anger is not only a tool in the hand of political opportunists like Trump, but it can give voice to the supporters and opponents of Trump as well.

The chapter six deals with another particular emotion, it examines the politics of love. The political aspect of love is studied through the phenomenon of 'fandom', more specifically the Milifandom movement (fans of Ed Miliband, UK Labour leader) and the movement of Trump lovers. In both cases love and other emotions legitimized the fans' political engagement, and this explicitly articulated affective commitment oriented them towards political and social change. It is also important that this chapter differentiates between different kinds of use of the term 'love'. In the case of Ed Miliband, love elicited other positive forms of emotions (political interest), while in the case of Trump this kind of fandom was an essential element of Trump's angry populism. While Trump's fans expressed their love, they also created identity boundaries and defined 'the Others', so love was usually combined with anger and hate.

Chapter seven tackles the emotional architecture of social media. Emotions have a central space on social media platforms, and this centrality of feelings 'shows a paradigm shift in thinking about public debate as it takes place through social media' (p. 165). Besides the fact that rationality is overshadowed by

[1] Anger is the key (ideological) factor of Trump's populism, hence the emotional connection between Trump and his supporters is based on the establishment of an 'us' against the 'them'. This emotional bond can be most easily maintained and intensified by the aversion and anger felt towards the 'others'.

emotions, social media is also a perfect place to manipulate users' emotions and use them for commercial success. There is a real 'emotional economy of our mediatized world' (p. 165), and that is why it is so important to take emotions into account in the field of politics as well.

The book ends with nine propositions. Though some of these are undoubtedly important, either they can seem self-evident or they have long been part of the discourse on emotions in political science. For instance, the first proposition (emotions are everywhere) talks about 'the massive unspoken presence' of emotions 'that hovers over everything, but that we have for so long refused to see, talk about and engage with' (p. 167). This statement is highly questionable, because in recent years emotions have become 'trendy' in the field of political science as well. It is a fact that today, there is a huge amount of literature dealing with emotions from very different perspectives: emotions are clearly visible, and it is getting harder and harder to ignore them. Proposition 4 (emotions are everywhere in mediated politics), proposition 5 (emotional storytelling may cultivate authenticity and compassion), proposition 6 (anger is the essential political emotion) and proposition 9 (research agendas in media and politics must consider the role of emotion) are not very much developed either, hence they essentially lack any kind of specifications, and they are not organized into a well-elaborated theory. Some readers may feel that more illuminating conclusions would have been provided in the last chapter by drawing on the extremely interesting observations of the previous part of the volume.

Apart from the above-mentioned shortcomings of the book, I would like to present those two statements which I found the most innovative, and which – I think – fight against those stereotypes that somewhat determine the way we think about emotions.

The first one is that emotionality and rationality are not mutually exclusive. In the 1980s, neurological research showed that there is no clear rational decision, so a decision-making process cannot exist without involving the emotional dimension as well (Damasio, 1994; Zajanc, 1984). Nevertheless, (political) emotions are still considered as threats to rational thinking and rational decision-making (not that thoughts, which are free from emotions, cannot be 'dangerous' in themselves anyway?) Rationality and emotionality are simultaneously present in politics, and for this reason they have to be examined together, in order to obtain a more accurate picture of politics. It is also important that a decision that seems to be overemotional, can be rational in the realm of politics, because it can help to gain and maintain political support (see Trump's angry populism.) Having focused on political gain, we can see that 'mediated emotions gain their significance from their performative construction and their role as a strategic resource' (p. 173). Emotional management and the manipulation of emotions can be a tool of political gain, thus emotions used in favour of (political) interest is another good example for the coexistence of rationality and emotionality.

'Love motivates us to engage in politics' (p. 170) is another impressive statement of the book. When we think of politics, we usually notice the overwhelming majority of negative emotions. This concept of negativity can be a cliché about politically relevant emotions. It is crucial that positive emotions ought

to be the object of future examinations too, because they can play just as important a role in politics as their negative counterparts. In connection with emotional valence there is another stereotype which the book attempts to resolve, that is 'emotions are not inherently good nor inherently bad' (p. 173). In order to change this binary subdivision (good/bad, positive/negative), emotions should be studied in their complexity. We can see from chapter six that fans' love can easily transform into hate and anger, while chapter five demonstrates that anger can play an important role in mobilizing and motivating people and in intensifying political engagement, too. Emotions are not just 'for themselves', we have to see the context, and it can be necessary to map the whole emotional repertoire in order to understand politics.

While the book makes many innovative statements about the political role of (mediated) emotions, these undoubtedly important concepts are not organized into one unified and complex theory, hence sometimes these valuable thoughts remain fragmented and we miss the potential connection points between them. Despite this criticism, *Emotions, Media and Politics* is an impressive work that designates future research directions in the study of emotions in political science and in political communication.

BEÁTA KOVÁCS
[kovacs.beata@tk.mta.hu]

References

Damasio, A. (1994) *Descartes' error.* New York: G.P. Putnam's Sons.

Dylan, E. (2001) *The Science of Sentiment.* Oxford: Oxford University Press.

Reddy, W. M. (2001) *The navigation of feeling: A framework for the history of emotions.* Cambridge: Cambridge University Press.

Westen, D. (2007) *The political brain: The role of emotion in deciding the fate of the nation.* New York: Public Affairs.

Zajonc, R. B. (1984) On the primacy of affect. *American Psychologist, 39*(2): 117–123.

Stroud, N. J., Scacco, J. M., Muddiman, A. and Curry, A. L. (2015) Changing deliberative norms on news organizations' Facebook sites. *Journal of Computer-Mediated Communication, 20*(2): 188–203. https://doi.org/10.1111/jcc4.12104

Book Review

Emily Syndor (2019) *Disrespectful Democracy. The Psychology of Political Incivility.* New York: Columbia University Press. 243 pages.

As regular observers of politics know, public discourse is rife with disrespectful language and rudeness. Nowadays, the growing concern about uncivil politics it is coupled with the apprehension that the verbal, gestural and, sometimes, physical aggression is no longer a subcultural or marginal phenomenon, but increasingly becoming the mainstream way of doing politics (see Herbst, 2010). Scholarly literature investigates political incivility by focusing on ad hominem attacks, name-calling, obscenity, mockery, belittlement, cursing, aspersion, knowingly false accusations, emotional display, misrepresentative exaggeration, conflagration, ideologically extremizing language, etc. in the interactions between politicians, journalists, and citizens (see Sobieraj and Berry, 2011; Coe at al., 2014; Stryker et al., 2016). There is a wide consensus about the view that incivility shapes citizens' political perceptions and behaviour (see Gervais, 2015; Santana, 2014; Stroud et al., 2015). Our knowledge is, however, surprisingly limited about the psychological predispositions of individuals which make people to respond differently to the exposure to political incivility. Emily Syndor addresses this gap by providing a political psychological analysis to illuminate the interplay between personality traits, incivility and their effect on political behaviour in the context of the United States of America.

This book is divided into six chapters with the first and last dedicating to conceptual issues. The introductory chapter provides an overview of how the author integrates political science and psychology. Chapter two poses the hypotheses and connects them to the existing knowledge of the field. Chapter three through chapter five are data analysis sections and they offer the core information and main arguments of the book.

The monograph starts with a thorough review of the existing literature and guides the reader through the evolution of the concept of incivility in politics. This volume joins the series of research studies that ground the analysis in politeness theory by considering incivility as a social norm violation that breaks the rules of accepted communication tonality (see Mutz, 2015; Muddimann, 2017). Inspired by the studies which are concentrating on the style of political communication, incivility is considered as a collective label for 'name-calling, finger-pointing, aggressive language, interruption, and insults' (p. 15). Syndor notes that incivility in politics is a contested concept with a variety of ways to approach (pp. 12–16), the problematic nature of defining incivility, however, remains under-reflected in the introductory chapter. The author forgets to ask: on what basis does a researcher define what counts as uncivil political communication and what does not?; who sets the discursive norms in the commentary platforms?; what if the labelled words and expressions are not perceived uncivil by the users? In other words, I miss the critical account of the norm violation approach. Besides, Syndor does not discuss the situational character of incivility which raises doubt whether

it is possible to develop a general vocabulary for the norm violating words and expressions that work across different contexts and periods. It would have been extremely useful if the author could have discussed the assumption that the individuals define incivility in different ways and the boundaries between acceptable and insulting language vary across demographic groups and sub-cultures.

In the second chapter, Syndor introduces the personality traits which, she believes, matter the most in relation to political incivility. The author convincingly argues that the conflict orientation of a personality is a specific type of 'approach/avoidance motivation, stable within an individual but with variation across different people' (p. 45). In order to influence someone's political behaviour, the conflict has to be manifest and incivility in politics is a perfect way to study manifest conflicts. Previous studies highlight that the effects of incivility are context-specific, while the main contribution of Emily Syndor's book is the demonstration that the impact also depends on the individuals' personality. The main hypothesis of the volume is that people's conflict orientations shape political behaviour, but the effects differ across civil and uncivil media environments (p. 8). The thesis is supported by four sub-hypotheses: an emotional hypothesis which is about the positive correlation between individuals' conflict avoidance/conflict approach and negative/positive feelings when exposed to incivility (p. 47). Then, an information-seeking hypothesis was formulated which is to test whether individuals' conflict orientations influence the level of motivation to look for the uncivil media content (p. 48). Engagement quantity and quality hypotheses orientate the empirical investigation on political behaviour: Syndor examines if the more conflict-approaching personality one has, the more likely he or she is to participate in political activities with high incivility and use uncivil language in political discussion (p. 49).

The sets of the empirical analysis are presented in the third, fourth and fifth chapters. The empirical data of the book relies on qualitative surveys and survey experiments. It is an appropriate method to study whether people's psychological predispositions towards conflict lead them to respond differently to the same stimuli of media content with a civil and an uncivil message. More precisely, pre-selected visual treatments were used: participants were requested to watch video clips with and without uncivil content. The statistical analysis (OLS regressions mostly) are convincing and quite complex. Sometimes it may be difficult for the non-statisticians to understand, although the author does her best to help the readers to navigate the tables and figures.

The sampling strategy is, however, less impressive. Each hypothesis is tested on data coming from a different sample source. The conflict orientation of individuals is based on the two-wave panel study which is nationally representative for the U.S. in 2016, while the emotional responses are tested with the aid of an omnibus survey. There are three different sources of data related to media habits and political participation which are mostly online convenience. The date of the data collection might also be problematic since it ranges from March 2012 to August 2016. Citizens' responses to incivility are very much likely to change over those years in the U.S., especially after the electoral victory of Donald

Trump who uses insulting language as a key component of his rhetoric. In my opinion, such a limitation should have been recognized more explicitly.

In spite of my criticism on some aspects of the data collection, I should give Emily Syndor credit for the methodological transparency of the examination. The author provides a remarkably detailed description of the survey experiment variables. Appendix A is a valuable part of the book for those who are novice researchers or anyone who wants to improve his/her methodological expertise.

As for the substance of the investigation, the third chapter reveals that individuals who are conflict-approaching feel more positive emotions – greater amusement, entertainment, and enthusiasm – when faced with incivility. Evidence is offered that the conflict-avoiding persons are more likely to experience negative feelings such as anxiety, anger, and disgust in the same situations. Syndor has controlled for the topic as well, but the psychological pattern seems to be consistent when the respondents had been watching political news and non-political content. The book, however, presents a somewhat counterintuitive finding concerning the information-seeking hypothesis in chapter 4: conflict-avoidant persons are more likely to keep looking for uncivil news media content. More specifically, social media and heavily biased blogs and television programs are preferred by those who tend to stay away from conflicts. The experiments suggest that conflict approaching persons spend less time with uncivil political content. The chapter carefully describes the finding, but unfortunately leaves a possible explanation to the readers. This might be the case because the statistics provide only weak support for the expectation that conflict orientation has any impact on media consumption.

In chapter 5, it is demonstrated that there no significant connections between conflict orientation and participating in donating money and voting. When the risk of potential exposure to incivility is increasing, like for example commenting on a political blog or persuading others to vote, the conflict-approaching respondents tend to get involved in the activity. It means that conflict-approaching people are better able to cope with the rudeness of contemporary politics in the United States, while incivility negatively affects conflict avoidant people. Those individuals become less powerful citizens since they associate politics with disrespectful and aggressive behaviour, therefore they are less likely to engage with politics.

Given the fact that aggressive verbal and nonverbal behaviour has become more and more visible in the U.S., the results of the book lead us to realize that a previously undiscovered type of political inequality might be on the rise. Citizens with a low level of conflict-tolerance are more likely to be marginalized in politics since their psychological predispositions are simply incompatible with the rudeness of contemporary American politics. Although, it is not advisable to eliminate incivility from politics since certain Americans find vitriol in political conversation very amusing and it even motivates them to participate in public discourse. With this conclusion, Emily Syndor's book on political incivility is a must-read for those who are interested in the psychological background of political behaviour.

GABRIELLA SZABÓ
[szabo.gabriella@tk.mta.hu]

References

Coe, K., Kenski, K. and Rains, S. (2014) Online and uncivil? Patterns and determinants of incivility in newspaper website comments. *Journal of Communication, 64*(4): 658–679. https://doi.org/10.1111/jcom.12104

Herbst, S. (2010) *Rude Democracy: Civility and Incivility in American Politics.* Philadelphia: Temple University Press.

Gervais, B. T. (2015) Incivility online: Affective and behavioral reactions to uncivil political posts in a web-based experiment. *Journal of Information Technology & Politics, 12*(2): 167–185. https://doi.org/10.1080/19331681.2014.997416

Santana, A. D. (2014) Virtuous or vitriolic: The effect of anonymity on civility in online newspaper reader comment boards. *Journalism Practice, 8*(1): 18–33. https://doi.org/10.1080/17512786.2013.813194

Stryker, R., Conway, B. A. and Taylor Danielson, J. (2016) What is political incivility? *Communication Monographs, 83*(4): 535–556. https://doi.org/10.1080/03637751.2016.1201207

Sobieraj, S. and Berry, J. (2011) From incivility to outrage: Political discourse in blogs, talk radio, and cable news. *Political Communication, 28*(1): 19–41. https://doi.org/10.1080/10584609.2010.542360

Stroud, N. J., Scacco, J. M., Muddiman, A. and Curry, A. L. (2015) Changing deliberative norms on news organizations' Facebook sites. *Journal of Computer-Mediated Communication, 20*(2): 188–203. https://doi.org/10.1111/jcc4.12104

Book Review

Eibl, Otto and Gregor, Miloš (eds.) (2019) *Thirty years of political campaigning in Central and Eastern Europe*. Cham: Palgrave Macmillan. 426 pages.

Modern political life cannot be understood without political marketing. While political campaigning in the western world has been widely studied and compared in political communication (Medvic, 2014; Thurber and Nelson, 2018; Potholm, 2003; Walter, 2013), this is not the case for countries in Central and Eastern Europe (CEE). There have been multiple reasons for that. Analyzing the evolution of the political campaigning in the whole CEE, assuming that we can come to interesting conclusions about similarities (or a lack of them) between the countries and the regions inside this whole geographical area is a challenging task.

The characteristics of regions inside CEE are both similar and different. Besides having been part of the Communist bloc, on the one hand many regions of CEE share common features; some countries share the same languages or ethnic groups, others have the same allies or enemies or want to be part of the same international organizations. On the other hand, the countries show vast differences as well, in terms of the socio-political and economic development.

Thankfully, this Goliath was not too frightening for Otto Eibl and Miloš Gregor, who gave us a compelling and absorbing book on the evolution of political marketing in the last three decades in CEE, with the contribution of a team of well-known researchers. The book is part of the prestigious series on Political Campaigning and Communication, edited by Darren G. Lilleker. The result is a unique comparative analysis of the evolution of ex-communist countries' political campaigns and marketing techniques, which can help the reader understand the reasons behind the progress, regress, or the stagnation of these countries toward the path of building a consolidated democracy.

The book starts with a brief historical overview of political campaigning in modern democratic states, describing how it evolved during the twentieth century. Eibl and Gregor focus on the milestones which have shaped political campaigning and summarize some of the most well-known theories and concepts regarding this evolution. This chapter will be useful, especially for the upcoming chapters, where the reader can understand the direct influence of western democracies in shaping the way CEE countries understood political marketing.

The book is divided into five parts. The first four parts focus on four different regions in CEE grouped considering their mutual history: Baltic states (Estonia, Latvia, Lithuania), Central Europe (or Visegrad Group: Czech Republic, Hungary, Poland, Slovakia), Balkans (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, North Macedonia, Romania, Slovenia, Serbia); and Eastern Europe (Moldova, Ukraine, Russia). Each part comes with an introduction and a conclusion about the dedicated region. This structure facilitates the comparison between countries, and between regions of CEE.

Each chapter analyzes the evolution of political campaigning in each country throughout the general elections of the last three decades. Since most of the countries are parliamentary democracies, most of the data will come from parliamentary elections, but there are also cases (such as Lithuania, Poland etc.), where presidential elections are taken into consideration. In cases where there are presidential elections but are not considered relevant for political marketing, such as in the case of North Macedonia, the focus has remained solely on the parliamentary elections. Even if the reader does not know anything about a given country in CEE, the dedicated chapters are organized in a way to give them the most relevant information regarding its historical, political, and societal background of the last thirty years. Historical overview of campaigns, the legal framework related to the electoral and political campaigns, and the recent trends are presented with evidence in all of the cases.

The evolution of campaigning in each country is followed by sections that are easy to read and rich in data tables through which anybody can check the electoral system on each election, its essential campaign characteristics, the main campaign focus, campaign topics or information about the presence of external advisors (foreign and domestic). There are also tables where the reader can understand what type of communication is used, what type of campaign activities are in place, understand whether there is a use of polling and research techniques, what are the campaign spending limits, free airtime on public media, and whether there was a possibility to buy airtime for political purposes. Whenever relevant, there are simple notes that give further information in each table.

Another concept that is well-delivered throughout the book is the personalization of politics. A clear definition of the concept and a theoretical discussion about the phenomenon is presented at the beginning of the book. Each country has been analyzed regarding the presence or absence of the personalization of politics. The shift from parties and topics to people and politicians represents a crucial point in the evolution of political campaign, and it is worth paying attention whenever it is presented. Part V of the book, dedicated to the conclusions, is simply and well elaborated, and comes as a digression of all the conclusion summaries of the previous chapters.

In this part, we can see that the more countries are democratic or politically and economically stabilized the easiest is to talk about the evolution of political marketing and their willingness to mirror the Western way of doing political campaigning. Countries engaged in internal or external fights (especially concerning their ethnic groups) have demonstrated a more complicated picture regarding the professionalization of the campaigns due to the direct affiliation of the citizens to one particular party or group. The relationship between CEE countries and the EU, NATO, Russia, the United States or other key players in the region, has also played its part in the speed in which each country has adopted new political marketing techniques. The whole segment dedicated to the conclusions serves as a testament of what this book has achieved, which is a clear understanding of the path of CEE political parties toward electoral communication modernization.

One of the limitations of the book is the absence of the analysis of other types of elections besides parliamentary or presidential ones. There are many countries where municipal elections have also been hard-fought battles, which have had their relevance on the way political marketing has developed afterwards. Referendums or presidential elections in countries where the President's role is not an influential one have not been analyzed in many cases. However, they may represent a crucial moment in a particular country to understand the development of political marketing.

Permanent campaigning, a concept widely discussed in political communication, can also determine the evolution of campaigning. While the book gives space to the presence of permanent campaigning (especially in the Baltic states), we have not much information on the real impact of permanent campaigning and its role in the evolution of political marketing in the case studies of different countries. Eibl and Gregor are well aware of this limitation of the book, which they mention in their conclusions: 'We were not able to cover a fully detailed development in every single country. With our aim of covering eighteen countries, we were limited by the extent of one book' (p. vii). Nevertheless, the edited volume is a lightning guide on the way the political parties in CEE countries have changed drastically with the scope of creating winning campaigns, and through their metamorphosis, we can better understand the societal, cultural and media changes in each country.

Whilst the regional outlook of the book is welcome, readers might wonder about the justification for the country selection. It is surprising to see that some states are missing from the list, such as Belarus, Kosovo and Montenegro. The last two are mentioned at various moments, especially in the chapter dedicated to Serbia or in the summary of the characteristics of the Balkans, so the reader would have naturally presumed to find dedicated chapters for these countries as well, and of course, they would have helped make the Balkan part more compact. Eibl and Gregor explain this decision by stating that 'some former Yugoslavian successors from the Balkans are missing because of their formation and independence years after the first wave at the turn of the 1980s' (p. vii). Overall the book would of course have benefited if these countries would also have been taken into consideration despite the difficulties.

It would have also been valuable to see whether countries in the same region have influenced each other through the way they organized their political campaigns. There are many cases in different regions where countries share the same language or are influenced directly by the trends of other countries neighboring them. This relationship is somehow missing or not fully developed even in the cases where it is mentioned.

The impact of social media is well elaborated in each chapter, and the summary of the recent trends are quite helpful for an understanding of the current situation in political marketing in the CEE countries. The current strategies of political campaigning are also briefly described and could be used as a good starting point for new researches. While concepts such as populism, fake news, big data, are presented in many cases, other relevant issues like post-truth and algorithmization do not find their proper space in the volume. Particularly, the

assessment of the emotions in campaigning is painfully missing throughout the book. It would have made the book even more impressive if the affective dimensions of the campaign culture in politics had been registered and analyzed. It is a well-known phenomenon by the international literature on political marketing that the politicians attempt to build an emotive relationship with voters on the 'accumulation of memories, emotions, personal narratives, and expectations' (Banet-Weiser, 2012: 8; Serazio, 2017). If we would agree with researchers such as Weber, that 'emotions are a vital characteristic to consider when describing the consequences of political campaigns' (Weber, 2012: 414), then we need further reflections on their role in the political marketing evolution of the selected countries.

Overall the book can be considered a thorough coverage of the subject of political campaigning in Central and Eastern Europe. Besides its limitations, it fulfils its promise to give a clear understanding of the most significant developments in political marketing in the area. The book will be of great benefit to researchers and professionals in political campaigning in all the 18 countries taken into consideration, but also to researchers and professionals from outside this area, to better understand how the different political and the historical context of countries influences the outcome in political marketing.

The book would be of great help also to future studies which will want to draw a comparison between Western and Eastern Europe in political campaigning, or even between CEE and other regions of the world. Finally, the book can be helpful also to journalists, media analysts, and students of political science, media studies, political communication and similar disciplines.

LOREN KOÇOLLARI
[l.kocollari@europeancollege.it]

References

Banet-Weiser, S. (2012) *Authentic*. New York: New York University Press.

Medvic, S. K. (2014) *Campaigns and Elections*. Abingdon, Oxon: Routledge.

Nelson, C. J., and Thurber, A. J. (2018) *Campaigns and Elections American Style*. Abingdon, Oxon: Routledge.

Potholm, C. P. (2003) *This Splendid Game*. Amsterdam: Adfo Books.

Serazio, M. (2017) Branding politics: Emotion, authenticity, and the marketing culture of American political communication. *Journal of Consumer Culture, 17*(2): 225–241. https://doi.org/10.1177/1469540515586868

Walter, A. S. (2013) Negative campaigning in Western Europe: Similar or different? *Political Studies*, *62*(1_suppl): 42–60. https://doi.org/10.1111/1467-9248.12084

Weber, C. (2012) Emotions, campaigns, and political participation. *Political Research Quarterly, 66*(2): 414-428. https://doi.org/10.1177/1065912912449697

CSABA MAKÓ AND MIKLÓS ILLÉSSY*

Automation, Creativity, and the Future of Work in Europe: A Comparison between the Old and New Member States with a Special Focus on Hungary

Intersections.EEJSP
6(2): 112–129.
DOI: 10.17356/ieejsp.v6i2.625
http://intersections.tk.mta.hu

* [mako.csaba@tk.mta.hu] (National University of Public Services, Faculty of Governance and International Studies);
[illessy.miklos@tk.mta.hu] (Centre for Social Sciences, Eötvös Loránd Research Network)

Abstract

Fear of job losses due to labor-saving technological change is not a new phenomenon, but dates back to the nineteenth-century Luddites in Britain. Recently, similar concerns have reawakened due to the rapid expansion of increasingly inexpensive and capable computers (digitization) and the automatization of some of the tasks that were formerly undertaken by workers. According to the empirical findings of European Working Condition Surveys (EWCS, 2005; 2015), every second workplace involves a form of 'creative work,' which is less threatened by automation, while every fourth worker carries out 'routine' tasks that will be easily replaced by computers. However, important country-group-level differences exist: creative jobs are found at rates above the EU-27 average in the Nordic, Continental, and Anglo-Saxon countries, while Mediterranean and Central and Eastern European countries are characterized by the highest proportion of jobs involving routine tasks. Among the post-socialist countries, Hungary lags behind the European average, and job loss trends suggest that concerns about the impacts of automatization on the job market for unskilled workers are valid.

Keywords: *automatization, digitization, employment, working conditions, EU.*

1. Introduction

For more than half a century, many business organizations and national policies have embraced Drucker's declaration that organizations only have two basic functions: marketing and innovation (Mohr, 2009). There have been attempts by political and social scientists to probe the wider social implications of innovation on labor and employment policy through theoretical and empirical analyses that have stressed the impact of technological advancement in relation to destroying workplaces on the one extreme, and innovation as a panacea for all problems on the other. Apart from literature on national innovation systems initiated by the Scandinavian innovation governance model (Edquist, 2019), more balanced evaluations have been relatively rare.

The significance of the topic has been further growing due to two recent events. The ten-year strategy of the European Union, accepted in 2010, placed smart, inclusive, and sustainable growth at the center of development policy (European Commission, 2010). Of these objectives, 'smart' has almost become synonymous with most modern technological development, 'inclusive' with the risk of widening social inequalities, while 'sustainability' draws attention to the long-term environmental and socio-economic impacts of human activity.

A key concern that has attracted attention, particularly in the industrial, agricultural, and service sectors, relates to the social impacts of technological changes caused by automation, digitalization and robotization. Our study describes the complex social impacts of technological innovation through the example of automation by using American, European, and Hungarian quantitative analyses. On the basis of cluster analysis we intend to answer three main research questions: i) to what extent are European labor markets susceptible to automation, ii) to what extent do EU Member States differ in this regard, and iii) what trends can be identified with respect to this phenomenon over time (i.e., between 2005 and 2015)? Our paper reviews the history of automation and the most relevant literature in the field, presents our own conceptual framework in the second section, describes the methodology and the data sources used in the empirical analysis, summarizes results, and raises some research questions and challenges for the future.

2. Literature review: between automation anxiety and technological optimism

Pessimistic forecasts about the negative impact of technological changes on employment, or so-called 'automation anxiety' has a long history in the social sciences.[1] John Maynard Keynes (1931) signaled that technological unemployment

[1] However, it is important to point out now that although the terms 'automation' and 'digitalisation' are used interchangeably, they slightly differ in content. In a stricter sense, *automation* is the phenomenon of manpower being replaced by machines for the same task. *Digitalisation,* on the other hand, means a process of using sensors and other digital instruments to transform processes of

was the new disease of economic development in the first third of the twentieth century. Moreover, he also drew attention to the possibility that countries lagging behind in development might find themselves in a more disadvantaged situation in the long term, while the hardships of adapting to technological changes are temporary. Leontief (1952) represented the more pessimistic view when he suggested that work would become less important in the future as machines increasingly replace workers, who will not necessarily be employed by newly emerging industries.

While changes in labor always occur, for nearly half a century forecasts that technological change will result in mass unemployment have not materialized. The employment-related problems accompanying new forms of development and technological unemployment have been regarded as temporary, short-term hardships related to adaptation. In addition, development-related failures have also signaled the hidden limits to automation. For instance, in the 1980s Volkswagen launched a project known as Halle 54 that was called the 'automated factory,' involving Computer Integrated Manufacturing (CIM). However, the experiment failed as the number of car rejects that were produced increased enormously, and repairing them made the factory uneconomical. By the end of the 1980s, attempts to totally automate production and entirely phase out the human factor were abandoned. According to Hack and Pfeiffer, VW's unsuccessful attempt at radical automation was the guinea pig and exemplar of a narrow-minded technological approach to modernization according to which every business organization is interpreted as technological in nature. In the authors' opinion, this approach had reached its limits, just as Taylorism did in the past. The basic reason for the failure of both approaches is that their rationalizing strategy was based on a flawed understanding of human-centered work organizations (Hack, 1994; Pfeiffer, 2010; Kopp, Howaldt and Schultze, 2016). The overarching question that has remained unchanged since then is how can human labor best be valued in the context of innovation and social change?

With the advent of intelligent robots, driverless cars, 3D printing, and, more generally, artificial intelligence (AI), we again are witnessing the resurrection of claims that technological development will cause unemployment, or, more broadly, automation anxiety (Brynjolfsson and McAfee, 2014; Ford, 2015). Nevertheless, in contrast to the earlier views of experts, those marketing the benefits of digitalization stress that robots are now partners and not enemies of workers, and increasingly will be so in the future. Nevertheless, estimates vary about the actual impact technological change is having on employment. Andrea Szalavetz (2018) likens the competing prophecies that envisage proximate employment disaster to a 'numbers war.' For instance, according to Frey and Osborne (2017), almost half of all employees (47 per cent) will be replaced by computers and algorithms in the

production or logistics into digitally conveyable and processable forms. Artificial intelligence (AI) – according to the most commonly used terminology 'is a system ability to operate in a goal-oriented fashion and anticipate its environment' (Koski and Husso, 2018: 56). What they have in common is an attempt to capture the efficiency of digital technologies; consequently, their impact on work and employment is similar in many cases.

USA in the forthcoming one or two decades. Bowles (2014) states that 45–60 per cent of the jobs in Europe will be automated. Experts say that within Europe the majority (59 per cent) of jobs in Germany are threatened by the risk of automation (Brzeski and Burk, 2015).

The most recent analyses have drawn attention to the more differentiated consequences of the impacts of automation and robotization on employment, rejecting scenarios that represent and simplify the likely radical changes. For example, one of the most recent studies from the internationally renowned consultancy firm McKinsey & Company, which involved the analysis of more than two thousand activities undertaken in nearly 800 jobs in the USA, found that in the following decade automation will result in the total disappearance of few actual jobs. Instead, a thorough transformation is already underway, affecting all jobs to a greater or smaller extent, regardless of the specific tasks undertaken at work (Chui, Manyika and Miremadi, 2016). The most recent analysis of the OECD 21 (Arntz, Gregory and Zierhan, 2016) came to very similar conclusions to those of the previous research: namely, that only onetenth (9 per cent) of all jobs in America are likely to be wiped out by the digital revolution.

The use of various concepts, levels of analysis and analytical methodologies often lead to incomparable, sometimes conflicting results. The field of labor sciences is no different, but the following two mainstream approaches can be distinguished. The first involves surveying the presence of information-communication technologies (ICT) in certain industries or jobs, and, based on these data estimates, developing forecasts of the future development of these technologies and their future impact on employment. The second approach is more differentiated, relying on surveys and other analytical tools to examine the effect of automation/digitalization on typical tasks in the workplace, from which aggregated estimates about impacts can be made. Our paper deals with the latter approach in detail.

One of the most significant analyses in the related field was carried out by David H. Autor (2014), who interpreted the possible impacts of automation on the level of tasks at work by drawing on Mihály Polányi's ideas, which were used as a theoretical framework. Polanyi examined the role of tacit knowledge by researching the structure of personal knowledge, and came to the conclusion that we know more than we can communicate in words (Polanyi, 1966). Polányi's insights made a contribution by creating a bridge between two main areas of human knowledge: explicit knowledge that can easily be codified and transferred formally, and tacit (personal) knowledge that is hard or impossible to codify.

Autor (2014), after examining the proportion of explicit and tacit knowledge elements necessary for undertaking work-related duties, divided jobs into three main categories: abstract-intensive, routine-intensive, and manual-intensive physical jobs. He argued that these three groups are exposed to the impacts of automation to different extents. 'Human tasks that have proved most amenable to computerization are those that follow explicit, codifiable procedures – such as multiplication – where computers now vastly exceed human labour in speed, quality, accuracy, and cost efficiency. Tasks that have proved most vexing to

automate are those that demand flexibility, judgment, and common sense – skills that we understand only tacitly – for example, developing a hypothesis or organizing a closet. In these tasks, computers are often less sophisticated than preschool age children' (Autor, 2014: 129).

After distinguishing these three groups, Autor started to examine American employment statistics and attempted to fit the ten non-agricultural main groups of jobs into his typology of three. The first category includes managerial positions and jobs that require higher education qualifications or a secondary school certificate, which are associated with higher salaries in general and require a high level of vocational education. Autor classifies employees in sales, office work and administration, production, assembly, repair and other jobs that require manual skills into the second category. These jobs are typically white-collar jobs requiring a secondary education, in relation to which the proportion of women is high, and also some blue collar jobs occupied by men who typically have a secondary or lower-level education. The third group of jobs includes security, the professions of personal assistance, cleaning, hospitality, and other service-oriented positions. These are jobs that offer lower salaries and/or require a lower level of education. According to Autor, digitalization primarily threatens jobs in the second category, as these are the tasks that can be routinized most easily.

In addition, Autor analyzed the employment trends of these three employment groups in the United States, beginning in 1979. Data justify his hypothesis that the proportion of those employed in the second category has historically decreased. The employment statistics span nearly four decades, and show on-going hollowing out of the second group (i.e. white-collar positions associated with a secondary education, and blue-collar jobs requiring secondary or a lower level of education). A similar trend can be traced in the European employment data as well. According to Autor, this decrease can partly by explained by increasing automation and digitalization.

However, the impact of automation does not merely involve the phasing out of jobs; rather, it prevails in a more complex way. 'The fact that a task cannot be computerized does not imply that computerization has no effect on that task. On the contrary: tasks that cannot be substituted by computerization are generally complemented by it. This point is as fundamental as it is overlooked' (Autor, 2014: 136). In these cases, digitalization does not have a direct impact on employment, but clearly influences job quality. As can be seen, the impact of automation prevails via a more complex mechanism that cannot be simplified merely as the 'anxiety and fear of technological unemployment' that arises from time to time. Autor's analysis shows that over the past four decades employment polarization has increased; i.e. there has been growth in the number of individuals with a higher level of education and high-wage jobs, and also of those with a lower level education in low-wage jobs, with a hollowing out in the middle, where a significant reduction in the number of jobs is statistically observable.

However, not everyone agrees with the polarization argument. Fernández-Macías, Hurley and Bisello (2016) in a study published with the support of the European Foundation for the Improvement of Living and Working Conditions

(Eurofound), examined the possible impact of automation on the European employment structure. From an analysis of the literature about employment shifts generated by technological development, the authors concluded that there are two wider-scale streams within it: skill-biased vs. routine-biased technological change. The former appreciates education and finds skill upgrading to be a major contributor to the employment tendencies of the past decades. The latter approach (which includes Autor's analysis) envisages the decreasing significance of routine tasks, and analyses the same data within the theoretical framework of employment polarization, looking for proof of justification. 'With upgrading employment shifts, the expected pattern is a more or less linear improvement in employment structure, with the greatest employment growth in high-paid (or high-skilled) jobs, the weakest growth in low-paid (or low-skilled) jobs, and middling growth in the middle. With polarisation, the main difference is that the relative positions, in terms of employment dynamics of the middle and bottom levels of the job distribution, are swapped: employment growth is weakest in the middle and relatively stronger at both ends of the job–wage distribution, leading to a "hollowed middle"' (Fernández-Macías, Hurley and Bisello, 2016: 11).

This polarization effect has prevailed in European small- and medium-sized enterprises (SME): 'The crisis period of 2008–2010 was characterized by significant job loss in Europe […]. The overall trend towards job polarization could also be observed for SMEs, with a lower level of job loss among the lowest-paid and highest-paid jobs compared with the medium wage categories' (Mandle et. al, 2016: 19). A similar trend may be noted in the most recent IMF review, which concludes that it is the service sector (financial services, public administration, healthcare, and education) that is worst affected by polarization. There are signs that more detailed research is required to confirm that polarization is occurring in the sectors most exposed to technological change (International Monetary Fund, 2017).

In order to obtain a more accurate picture about European employment shifts after the financial and economic crisis (2008) than the general analyses that are available, Fernández-Macías, Hurley, and Bisello (2016) combined the approach of examining employment groups with industrial analyses so that their basic unit of observation was jobs within specific industries. These were then classified into quintiles on the basis of average salaries so that the employment level could be examined before, during, and after the crisis. Due to the constraints of the study, neither the methodology nor the results can be presented in detail here, but the following contains a summary of the three most important findings.

First, European employment trends have always been characterized by the simultaneous presence of skill upgrading and polarization, although the extent of these has changed dynamically throughout the years. Before the global financial crisis and economic downturn that began in 2008, upgrading skills dominated, while polarization also took place, although minimally. In the aftermath of the crisis, polarization obviously increased while employment also climbed in relation to the jobs in the upper quintile, so upgrading also prevailed. The more recent phenomenon (lasting from the second quarter of 2013 to the second quarter of 2015) was a well-balanced increase in employment with a minimal shift to higher

skilled jobs. There was no sign of a lessening of demand for skills on an aggregate European level, but the increase in the level of the former was less obvious than in the years before the crisis (Fernández-Macías, Hurley and Bisello, 2016). While the current economic downturn caused by the response to COVID-19 appears to be hitting Western Europe and the USA particularly hard, even as unemployment levels remain relatively low in Eastern European countries, it remains to be seen whether the trend will increase polarization.

Second, although the most recent trends related to the employment shift are less compatible with skill upgrading than before the crisis, skill downgrading obviously occurred only in two countries. 'Over the four-year period 2011–2015, Hungary and Italy both experienced an obvious downgrading pattern of employment shift. In each of these countries, employment growth was strongest in the lowest-paid jobs and weaker in higher-paid jobs […]. At aggregate EU level (*sic*) over 2011–2015, there was upgrading with some polarization – relatively faster growth in the bottom than in the middle. However, this involved a more even spread of job gains across the wage distribution, as employment growth accelerated from mid-2013 onwards' (Fernández-Macías, Hurley and Bisello, 2016: 13).

Third, while the greatest growth was produced by the service sector, employment also increased in some areas of the manufacturing industry, such as in food processing and car manufacturing. Moreover, in these sub-industries the greatest growth was observed in the highest paid jobs.

3. Automation and creativity: A conceptual framework

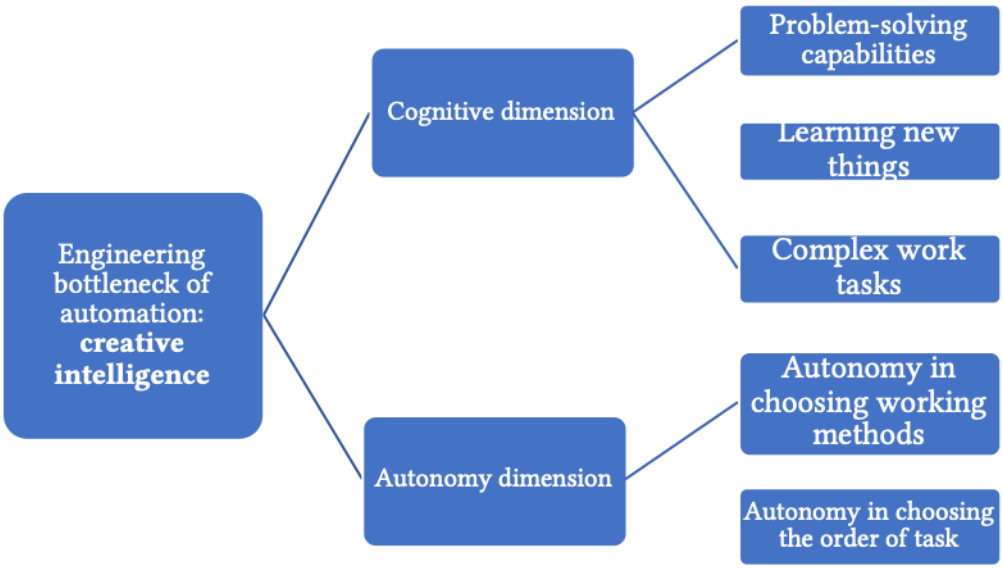
To describe labor markets in the Member States of the European Union from the perspective of the possible impact of current and future waves of automation and digitalization, we draw upon the theoretical basis elaborated by Frey and Osborne (2017), who distinguished three major job characteristics – perception and manipulation, creative intelligence, and social intelligence – that may inhibit the substitution of human labour by computers. The authors conclude that jobs requiring the mobilization of any of these labour inputs are less likely to be automated. Here, we narrow our focus to the creative element of job requirements for two reasons. First, we wanted to keep our model as simple as possible, and second, the creative dimension is relatively easy to measure compared to the perception/manipulation and social intelligence dimensions, which are more difficult to capture using survey questions. We assume that countries where the share of creative jobs is high will be less impacted by automation and digitization in terms of job losses, and that countries where creative jobs are less dominant are more susceptible to the negative effects – in terms of job losses – of automation.

In order to estimate the potential impact of automation in the European Union, we use Lundvall and Lorenz's work (Lundvall and Lorenz, 2010) as a starting point. Inspired by Richard Florida's seminal work on the creative class (Florida, 2002), the authors analyzed the fourth wave of European Working Condition Survey (EWCS) data from 2005 to examine the emergence of the

European creative class. Their conceptual framework, however, permits us to extend their analysis to make a preliminary forecast about the susceptibility of European jobs to automation by combining the data analysis that is available at the job-task level with the analytical conception of Autor about the cognitive aspects of jobs. Instead of predicting the probability of automation on an occupational basis, analysis of the EWCS database makes it possible to investigate directly the likelihood at the job level, which – in our opinion – provides a better estimate of the potential employment impacts of automation and digitalization.

We assume that creative jobs involve highly abstract elements involving more tacit knowledge and complex problem solving that is harder to automate. We also assume that creativity at work is associated with some level of employee autonomy, thus the higher the level of autonomy an employee enjoys at work, the less the probability that their job will be automated. Therefore, following the model of Lorenz and Lundvall, we used two types of variables in our analysis to measure the probability of automation, one capturing the cognitive aspects of jobs, and the other measuring employee autonomy at work.

Figure 1: Analytical framework for predicting the probability of automation



Source: Authors' compilation

Because these data describe job requirements, our unit of analysis is jobs, not employees, which is an important consideration when interpreting our results. It is also important to note that the assumptions we make about the probability of automation are valid only under the conditions of the current technological paradigm. As technology develops over time, new opportunities and development paths will open up; consequently, the real effects of digitalization may vary in

ways that cannot be clearly projected now. What is more, the employment impacts of technological development are not determined solely by technology itself, but are also shaped by societal change that is engineered or driven by stakeholders (governments, trade-unions, civic organizations, employers' associations, the scientific community) and externalities (such as a global pandemic and resulting economic downturn). In other words, while many of the studies about automation that have recently been published are informed to varying degrees by technological determinism and confident predictions about the future, we do not share these approaches and strongly believe in societal agency, and that the future is ultimately unknown. However, we share the following view of Freeman that 'technology in itself is neither good nor bad. It is the use which human beings make of any technology which determines both the nature and the extent of benefits' (quoted in Soete, 2018: 29).

4. Methodology and data sources

Data from several European Working Conditions Surveys (EWCS) represent a unique opportunity to analyze empirically task-based changes over a longer time (i.e. taking a longitudinal perspective). The survey is based on interviews with almost forty thousand European employees that are carried out every five years (Eurofound, 2015). Part of the survey instrument focuses on identifying the cognitive (learning) characteristics of work, as well as the level of autonomy of employees. These two dimensions of work are especially important for identifying the level of exposure to automation: as Autor (2014) suggested, until machines learn to study, only activities whose rules can relatively easily be programmed can be automated, such as those based on transparent, explicit routines that do not require human interaction in ad hoc situations.

Since Lundvall and Lorenz published their above-mentioned paper in 2010, the database of the 2015 survey was also made available, allowing us to identify longitudinal trends between 2005 and 2015. We also extended the scope of analysis by including the New Member States of the post-socialist countries, which is another novel feature. This paper focuses on salaried employees working in organizations with at least 10 employees in non-agricultural sectors as industry and service, excluding public administration and social security; education; health and social work; household activities; as well as agriculture and fishing. In addition, the study excludes several non-market occupational categories such as armed forces occupations; skilled and elementary agricultural, forestry and fishery occupations. To be simple and brief, data from Malta and Cyprus are not listed separately in the tables but as part of the European average. Furthermore, Croatia was also excluded from the sample as it joined the European Union only in 2013.

On the basis of Lorenz and Lundvall (2010), the following six variables were used to identify the cognitive dimensions of work tasks and the level of employee autonomy: i) the importance of problem-solving ability at work, ii) the opportunity for studying new things, iii) the complexity of work tasks, iv) the possibility of using ideas at work, v) the level of autonomy in selecting working methods, and

vi) the level of autonomy in choosing the order of work tasks. First, we employed multiple correspondence analysis (MCA), followed by Ward's method of hierarchical cluster analysis on the basis of the factor scores.[2]

The cluster analysis distinguished three larger groups of jobs. In creative jobs, employees have to make use of their cognitive abilities at work to a large extent, and enjoy a large degree of autonomy. Jobs organized on Taylorean principles represent the other end of the scale, and involve the least use of cognitive abilities and autonomy. Between these two groups, constrained problem solvers can be identified whose jobs are characterized by relatively strong expectancies about cognitive learning, and an extremely low level of autonomy. We assume on the basis of the above that Taylorean jobs will be most affected by automation, while the jobs of creative workers and, to a slighter extent, constrained problem solvers, will be less dramatically affected by the processes of automation.

5. Research results

Analysis of the changes in the EU-27 average shows that within the ten years of the survey, few changes were experienced in terms of single jobs. Almost one-quarter of all the jobs of European employees may be defined as involving constrained problem solving,[3] and half of all employees had creative jobs. However, as can be seen from Table 1, the stable European average masks significant differences and dynamics between the country groups. Not surprisingly, most creative jobs can proportionally be found in *Scandinavian countries*. Almost three-quarters of jobs in that region significantly rely on the cognitive abilities of employees, which ensure a high level of autonomy. Of the three Nordic countries examined during the ten years, the proportion of the former jobs also increased in Denmark and Finland, while Sweden, which originally had the highest proportion, experienced a decrease. In parallel, the proportion of Taylorean jobs is the lowest in Europe, and significantly decreased or levelled off in Sweden between 2005 and 2015.

The Continental country group shows a much more heterogeneous picture. Somewhat surprisingly, Germany, with a downward trend, stands out from this cluster as the number of creative jobs does not reach 50 per cent, while the share of Taylorean ones reaches nearly 30 per cent. The proportion of the latter is the lowest in Luxembourg, almost at the level of the Scandinavian countries, which can be explained by the former's well-developed financial sector. A significant difference, in comparison with the Nordic countries, is that the proportion of constrained problem-solving jobs in Germany is much larger.

The case of the Netherlands is similar to that of Germany, with increasing proportions of Taylorean jobs. This is noteworthy, as in 2005 the Netherlands was

[2] For further methodological details, see Makó et al. (2019) and Lorenz and Lundvall (2010).

[3] It is important to stress that it is not employees but jobs that are characterised as creative or Taylorean. An underskilled employee may also have a creative job, and many highly qualified professionals have less creative jobs.

more similar to the Scandinavian county group than the Continental one. However, the years since the 2008-2009 economic crisis have brought about radical change, but in a negative direction.[4] In contrast, the proportion of creative jobs in Austria has significantly increased.

Table 1: Types of Workplaces: Country Group Comparison – EU-15 (EWCS 2005, 2015)

	2005			2015		
	CW	CPS	TW	CW	CPS	TW
Nordic countries						
Denmark	74	13	13	77	14	9
Finland	67	20	13	73	18	9
Sweden	80	10	10	74	15	11
Continental countries						
Austria	51	29	20	57	25	19
Belgium	56	20	23	59	19	21
France	59	19	21	62	24	14
Netherlands	72	16	13	63	16	21
Luxemburg	63	18	19	65	24	11
Germany	51	25	24	49	23	29
Mediterranean countries						
Greece	40	32	28	28	32	40
Italy	40	28	33	45	16	38
Portugal	42	24	34	41	28	31

[4] To decide what role the crisis, technical changes gaining ground, or a third factor, played in these changes is beyond the scope of the study. Our paper makes reference to the crisis as it is obvious that such shocks do have an impact on job quality, especially the creative dimension of work tasks, and the extent of employees' autonomy.

	2005			2015		
	CW	CPS	TW	CW	CPS	TW
Spain	**37**	**28**	**35**	**47**	**28**	**25**
Anglo-Saxon countries						
Ireland	**58**	**19**	**22**	**55**	**21**	**24**
United Kingdom	**50**	**20**	**30**	**59**	**21**	**20**
EU-27	**50**	**24**	**26**	**52**	**24**	**24**

Source: Authors' calculation from the fourth (2005) and the sixth (2015) waves of the European Working Conditions Survey. Legend: CW= Creative Workers; CPS= Constrained problem-solvers; TW= Taylorized Workers.

The period of the crisis also accelerated convergent processes in the Anglo-Saxon countries within the cluster. In 2005, 58 per cent of the jobs in Ireland were creative, which proportion had decreased to 55 per cent by 2015. In contrast, during the same period in the United Kingdom this share increased from 50 per cent to 59 per cent. Interestingly, this significant growth exclusively impacted Taylorean jobs, while the proportion of constrained problem solvers did not change. Numerically, this means that in the United Kingdom the share of least creative jobs decreased from 30 per cent to 20 per cent within 10 years.

Not surprisingly, within the EU-15 countries the proportion of creative jobs is smallest in the Mediterranean countries. It is more interesting however, that most of the latter countries were able to catch up in this regard with the EU-27 average during the crisis. Spain takes the lead, where the proportion of creative work increased from 37 per cent to 47 per cent, but in Italy the share also grew from 40 per cent to 45 per cent. In Portugal, the proportion did not change. Only in Greece did it dramatically decline, from 40 per cent to 28 per cent.[5] In parallel, the proportion of Taylorean jobs was strikingly high, not only in comparison with the old Member States but also most post-socialist countries The two extremes are represented by Spain and Greece, respectively. The proportion of least creative jobs decreased by 10 percent in the former, and increased by 12 percent in the latter. Another fact worth highlighting is that in Italy not only did the proportion of the most innovative jobs increase, but the least innovative ones did as well during the same time period (between 2005 and 2015).

The Post-Socialist country group also shows a varied picture (Table 2). Estonia stands out from the Baltic *North-Eastern European counties*, as the high proportion of creative jobs and the general distribution of job types are similar to

[5] The latter one also signals that in addition to the technological changes the crisis also played a great role in forming clusters at work.

those of the more developed countries of the Continental cluster. Lithuania is positioned in the middle, as less than half of all jobs were creative, and the rest were evenly distributed among the other two types of jobs. The case of Latvia is unique since it is one of the least developed countries in the EU, although it was one of the leaders in terms of the number of creative jobs in the region in 2005. While 2010 data are not included in the table, it is worth remarking that the country strengthened its position at that time, and the drastic decrease occurred within the last five years. The Visegrad countries and Slovenia were categorized as Central European countries, although the latter significantly differs from the others regarding innovative jobs. The 55 per cent of creative jobs is similar to the proportion in Anglo-Saxon countries, and makes Slovenia stand out in this country group, similarly to Estonia in the North Eastern country cluster. What is striking in connection with the countries of the Visegrad region is that, in all four member countries, the share of creative jobs decreased after the 2008/2009 crisis. This decrease was strongest in Hungary, which went from having 44 per cent to 37 per cent of the latter jobs. Hungary is also the only one of the five countries where the proportion of least innovative, Taylorean jobs exceeds that of the share of constrained problem solver jobs, whose autonomy is minimal but for which the learning capability of employees is crucial. The proportion of these jobs increased by six percent within ten years. The situation in Poland is similar. Creative jobs lost ground due to an increase in Taylorean jobs. The weaker position of the Visegrad countries resulted in the fact that the share of innovative jobs in two *South-Eastern European Member States* (Romania and Bulgaria) further eroded. This occurred in parallel with stasis in the proportion of creative jobs, although the former decrease was much smaller than in Hungary.

Table 2: Types of Workplaces: Country Group Comparison – Post-socialist Countries (EWCS 2005, 2015)

	2005			**2015**		
	CW	**CPS**	**TW**	**CW**	**CPS**	**TW**
North Eastern Europe						
Estonia	**57**	**25**	**19**	**62**	**21**	**18**
Latvia	**52**	**19**	**29**	**35**	**17**	**48**
Lithuania	**39**	**30**	**31**	**45**	**28**	**27**
Central Eastern Europe						
Czech Republic	**43**	**30**	**27**	**38**	**32**	**30**

	2005			2015		
	CW	CPS	TW	CW	CPS	TW
Poland	46	32	22	41	30	29
Hungary	44	29	27	37	30	33
Slovakia	37	32	31	35	35	31
Slovenia	52	24	24	55	26	19
South Eastern Europe						
Bulgaria	40	30	29	38	34	28
Romania	37	39	24	35	37	28
EU-27	50	24	26	52	24	24

Source: Authors' calculation from the fourth (2005) and the sixth (2015) waves of European Working Conditions Survey. Legend: CW= Creative Workers; CPS= Constrained problem-solvers; TW= Taylorized Workers.

6. Summary and challenges for future research

The ongoing increase in info-communication technologies in production and services draws attention to the importance of examining the social – and particularly work-related – impacts of technological changes. During the earlier years of 'automation anxiety' that were generated by automation, digitalization, and robotization, menacing forecasts projected the disappearance of many jobs. The second wave of studies, more empirically focused, revealed a more complex picture and produced more differentiated findings. In parallel, researchers started to concentrate on the content of work tasks, instead of job groups, making estimations of how many employees are endangered by automation. This has also involved examining jobs for which automation does not substitute but rather complements human work, thereby making more differentiated analysis possible.

In our analysis we first applied the analytical framework of Frey and Osborne (2017), which classifies three main elements of job content that may inhibit attempts at automation: perception and manipulation, creative intelligence, and social intelligence. Using the databases of different waves of the European Working Conditions Survey allowed us to measure the risk of automation in line with the creative intelligence dimension of European jobs. We then used the model of Lundvall and Lorenz (2010) to identify three clusters of jobs that are susceptible to automation to different degrees, with creative jobs that are characterized by a high level of employee autonomy and creative skill requirements being at the lowest risk of automation. In contrast, Taylorean jobs can be characterized by low

level of employee autonomy and less room for creativity, meaning that these jobs are more likely to be automated. The third cluster of jobs, constrained problem solvers, are located in between the previous two cluster and can be characterized by a high level of creativity and low level of autonomy. Interpreting more deeply the susceptibility of these jobs to automation poses a challenge, particularly in view of recent social and economic developments, but we estimate that these kinds of jobs are less likely to be automated than Taylorean ones.

The results of the 2005 and 2015 EWCS database were analyzed, and led to the following most important findings:

1) Although the aggregated job cluster patterns of the EU-27 average have hardly changed in the examined ten-year period (2005–2015), significant differences exist between countries and important shifts took place.
2) In European countries, the proportion of creative jobs is the greatest and that of Taylorean jobs the smallest in the Scandinavian countries, followed by the members of the Continental and Anglo-Saxon country groups. With regard to the former metrics, the situation in Mediterranean and the East-Central European post-socialist countries is below the average of their European peers, with the former somewhat more favorably positioned.
3) From 2005 to 2015 strong convergence can be detected within the Scandinavian, Continental, and Anglo-Saxon country groups, while differences between the groups remained or even slightly increased. In contrast, significant divergence can be observed within the Mediterranean and the Post-Socialist country groups.
4) Estonia and Slovenia stand out from the post-socialist countries, as the share of creative jobs is similar to that of the Continental and Anglo-Saxon country groups. In contrast, the share of creative jobs significantly decreased in the Visegrad countries, occasionally approaching the level of Romania and Bulgaria, which countries are considered to be the least developed in the region.

Due to our particular interest in forecasting the employment risks of automation in Hungary, it is worth stressing that negative trends prevail in Hungary. While 2010 data are not included in our tables, it can clearly be seen from the results that the situation had become unfavorable within that timeframe. In 2010, the share of creative jobs was 48 per cent, of Taylorean ones 23 per cent, and within five years the proportion of the former had dropped to 37 per cent, and that of the latter increased to 33 per cent. All these processes are a cause for concern as technological development may result in the high exposure to automation of Taylorean jobs.

Hungary has based its economic competitiveness on a cheap but skilled labor force, and its geographical proximity to the center of Europe. This strategy was successful until the middle of the 2000s. With some significant exceptions, such as automotive, high-tech service, and software companies, Hungarian enterprises have been unable to attract higher value-added activities that could open the way to more knowledge-based economic development. There are signs that the segmented nature of the Hungarian economy has increased in past

decades, as internationally renowned companies that produce and provide services to international markets exist and operate side by side with newly created small- and medium-sized enterprises that operate on the Hungarian market, and growing players in the state-owned or partly state-owned sectors (Makó and Illéssy, 2016). Weak cooperation and networking between these three segments creates a barrier to exploiting the economic opportunities of the country. Automation, digitization, AI, and the related changes in working organizations are the tools for renewing the competitiveness strategy of Hungary. For example, in the United Kingdom, one of the explicit objectives of the strategy that has been defined to improve Industry 4.0 is to rebuild the industrial basis of the economy and relocate (resource) processing industry activities back to the island from low-labour-cost countries (Made Smarter, 2017: 8). If these scenarios play out, such changes may occur that foster the reorganization of global value chains and shake up Hungary's position in this field. Although the cheaper and more disciplined labour force – and extremely developed supplier network – in South East Asia posed less of a threat to Hungarian jobs than expected, German AI-related ambitions and the shift towards the use of electric cars represent a much more realistic danger to jobs that is predominantly associated with routine tasks in the production and service sectors of the global value chain.

References

Arntz, M., Gregory, T. and Zierahn, U. (2016) The Risk of Automation for Jobs in OECD Countries. *OECD Social, Employment and Migration Working Papers,* No. 189. https://doi.org/10.1787/5jlz9h56dvq7-en

Autor, D. H. (2014) Polanyi's Paradox and the Shape of Employment Growth. *National Bureau of Economic Research Working Paper,* No. 20485. https://doi.org/10.3386/w20485

Bowles, J. (2014) The Computerization of European Jobs. *Bruegel,* 24 July. Available at http://bruegel.org/2014/07/the-computerisation-of-european-jobs Accessed 11-01-2018.

Brynjolfsson, E. and Mcafee, A. (2014) *The Second Machine Age: Work, Progress, and Prosperity in a Time of Brilliant Technologies*. New York and London: W.W. Norton & Co.

Brzeski, C. and Burk, I. (2015) *Die Roboter kommen: Folgen der Automatisierung für den deutschen Arbeitsmarkt (The Robots are Coming: Consequences of Automatisation for the German Labour Market)*. ING DiBa Economic Research. Available at https://www.ing-diba.de/pdf/ueber-uns/presse/publikationen/ing-diba-economic-research-die-roboter-kommen.pdf Accessed 21-01-2018.

Chui, M., Manyika, J. and Miremadi, M. (2016) Where machines could replace human – and where they can't (yet) (The Technical potential for automation differs dramatically across sectors and activities). *McKinsey Quarterly,* 2016/3. Available at https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/where-machines-could-replace-humans-and-where-they-cant-yet Accessed 03-12-2017.

Edquist, Ch. (2019) Towards a Holistic Innovation Policy: Can the Swedih National Innovation Council (NIC) be a Role Model? *Research Policy, 48*(4): 869–879. https://doi.org/10.1016/j.respol.2018.10.008

Eurofound (2015) *European Working Conditions Survey.* Available at https://www.eurofound.europa.eu/surveys/european-working-conditions-surveys Accessed 31-03-2018.

European Commission (2010) *Europe 2020: A Strategy for Smart, Sustainable and Inclusive Growth.* Brussels: European Commission.

Fernández-Macías, E., Hurley, J. and Bisello, M. (2016) *What Do Europeans Do at Work? A Task-Based Analysis: European Jobs Monitor 2016.* Luxembourg: Publications Office of the European Union. Available at https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef1617en.pdf Accessed 31-03-2018.

Florida, R. (2002) *The Rise Of The Creative Class: And How It's Transforming Work, Leisure, Community And Everyday Life.* New York: Perseus Book Group.

Ford, M. (2015) *The Rise of the Robots.* New York, Basic Books.

Frey, C. and Osborne, M. (2017) The Future of Employment: How Susceptible are Jobs to Computerization? *Technological Forecasting & Societal Change, 114:* 254–280. https://doi.org/10.1016/j.techfore.2016.08.019

Hack, L. (1994) Industriesoziologie (Industrial Sociology). In Kerber, H. and Schmieder, A. (eds.) *Spezielle Soziologien. Problemfelder, Forschungsbereiche, Anwendungsorientierungen.* Hamburg, Rowohlt. 40–74.

International Monetary Fund (2017) *World Economic Outlook October 2017: Seeking Sustainable Growth – Short-term Recovery, Long-term challenges.* Washington: International Monetary Fund.

Keynes, J. M. (1931) *Essays in Persuasion.* London: MacMillan and Co.

Kopp, R., Howaldt, J. and Schultze, J. (2016) Why Industry 4.0 needs Workplace Innovation: A critical look at the German debate on advanced manufacturing. *European Journal of Workplace Innovation, 2*(1): 7–24. https://doi.org/10.46364/ejwi.v2i1.373

Koski, O. and Husso, K. (2018) Work in the Age of Artificial Intelligence: Four Perspectives on the Economy, Employment, Skills and Ethics. Helsinki: Ministry of Economic Affairs and Employment. Available at http://urn.fi/URN:ISBN:978-952-327-311-5 Accessed 31-10-2018.

Leontief, W. (1952) Machines and Man. *Scientific American, 187*(3): 150–160.

Lundvall, B.-Å. and Lorenz, E. (2010) Accounting for creativity in the European Union: A multi-level analysis of individual competence, labour market structure, and systems of education and training. *Cambridge Journal of Economics, 35*(2): 269–294. https://doi.org/10.1093/cje/beq014

Made Smarter (2017) *Made Smarter: Review 2017.* Available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/655570/20171027_MadeSmarter_FINAL_DIGITAL.pdf Accessed 31-10-2018.

Makó, Cs., Illéssy, M. and Borbély, A. (2019) Creative workers in Europe: Is it a reserve of the 'Would-Be Entrepreneurs'? A cross country comparison. In Dallago, B. and Tortia, E. (eds.) *Entrepreneurship and Local Economic Development: A Comparative Perspective on Entrepreneurs, Universities and Governments.* New York: Routledge. 186–207.

Makó, Cs. and Illéssy, M. (2016) Segmented capitalism in Hungary: Diverging or converging development paths? In Delteil, V. and Kirov, V. (eds.) *Labour and Social Transformation in Central and Eastern Europe: Europeanization and Beyond.* London and New York: Routledge. 77–97.

Mandl, I., Hurley, J., Ledermaier, S. and Napierala, J. (2016) *Job creation in SMEs: ERM Annual Report 2015.* Luxembourg: Publications Office of the European Union. https://doi.org/10.2806/342142

Pfeiffer, S. (2010) Technisierung von Arbeit (The Technicisation of Labour). In Böhle, F., Voß, G. and Wachtler, G. (eds.) *Handbuch Arbeitssoziologie.* Wiesbaden: VS Verlag für Sozialwissenschaften. 231–262.

Polanyi, M. (1966) *The Tacit Dimension.* New York: Doubleday.

Soete, L. (2018) Destructive creation: Explaining the productivity paradox in the digital age. In Neufeind, M., O'Reilly, J. and Rauft, F. (eds.) *Work in the Digital Age: Challenges of the Fourth Industrial Revolution.* London: Rowman & Littlefield. 29–46.

Szalavetz, A. (2018) Ipari fejlődés és munka a tudásalapú társadalomban (Industrial development and work in knowledge-based societies). *Magyar Tudomány, 179*(1): 55–60. http://doi.org/10.1556/2065.179.2018.1.6

KAROLINA LENDÁK-KABÓK, STANISLAVA POPOV AND IMRE LENDÁK*

The Educational Migration of Sub-state Ethnic Minorities on the Outskirts of the EU: A Case Study of Serbia

Intersections.EEJSP
6(2): 130–153.
DOI: 10.17356/ieejsp.v6i2.592
http://intersections.tk.mta.hu

* [karolina.lendak@uns.ac.rs] (Faculty of Philosophy, University of Novi Sad);[stanislava.popov@gmail.com] (Faculty of Sport and Tourism, Educons University, Novi Sad); [lendak@inf.elte.hu] (Faculty of Informatics, ELTE, Budapest; Faculty of Technical Sciences, University of Novi Sad)

Abstract

The goal of this paper is to present an analysis of the status and career choices of Hungarian, Slovak, and Romanian ethnic minority high school graduates in the Autonomous Province of Vojvodina, the northern province of Serbia. We implemented a purpose-built, paper-based-questionnaire process of data collection that involved 2,192 ethnic minority high school students who were finishing high school in their mother tongues in 16 municipalities in Vojvodina. The results of the analysis showed that almost 40 per cent of the sample of ethnic minority high school graduates planned to leave Serbia to study in their mother tongues in nearby European Union (EU) countries. While this brain drain is not a new trend, our research shows that there are new and different reasons for it and it was caused by the insufficiency of Serbian language skills of the ethnic minority studnets. The results of the research show that the main reason for this educational migration is thus the aspiration to obtain a diploma from an EU-based institution, which (1) grants immediate access to the EU's integrated labor market, and (2) is perceived to improve social status compared to that of remaining in Serbia after graduating. Despite this new motive for educational migration, language barriers are still relevant determinants of the latter. A gender-sensitive analysis of the responses was undertaken that showed that there are gender-based differences in terms of which students continue their studies after high school, and in the reasons for staying in Serbia.

Keywords: *ethnic minorities, educational migration, high school graduates, brain drain, language barrier, gender differences, Vojvodina, Serbia.*

1. Introduction[1]

Vojvodina, the northern autonomous province of Serbia, is known for its stormy past and changing borders due to historical events.[2] Vojvodina is not a territorial autonomy on ethnic grounds, but a multi-ethnic region with a clear (and growing) Serbian majority (Székely and Horváth, 2014: 434). Its autonomy is largely geographical and socio-political. It is home to sizeable Hungarian (13 per cent, ca. 250,000), Romanian (1.3 per cent, ca. 25,000) and Slovak (2.6 per cent, ca. 50,000) ethnic minority communities (Statistical Office of the Republic of Serbia, 2012).[3] When it comes to defining national structure, following Kymlicka's (2007) classification of three general types of minorities in Western democracies (indigenous, sub-state, and immigrants), we consider the above-mentioned ethnic minorities as sub-state 'national groups'. These national groups or national minorities are caught between two mutually antagonistic nationalisms – those of the nationalizing states in which they live, and those of the external national homelands to which they belong by ethnonational affinity, though not by legal citizenship (Brubaker, 1996: 5). In this triadic nexus (Brubaker, 1996), members of these Hungarian, Slovak, and Romanian ethnic minorities are in a challenging position: the main bodies of their nations live in nation states inside the European Union (EU), while they are 'locked out' in Serbia, a non-EU state. The educational system of Serbia allows the young members of these ethnic minorities to finish their primary and secondary education in their mother tongues (Hungarian, Romanian, and Slovak). After high school, most of them need to decide between continuing their studies in the predominantly Serbian-language higher education system in Serbia, or leaving Serbia and continuing their studies in their mother tongues in neighboring/nearby EU states. If they choose to study in Serbian, they need to master the Serbian language, as without proficiency in Serbian they often face a language barrier that makes their participation in classes and examination difficult (Lendák-Kabók and Lendák, 2017). In a recent study that was conducted with the aim of improving multilingual education in Vojvodina, it was shown that ethnic minorities consider knowledge of their mother tongue to be most important, subsequently followed by knowledge of the majority language. The former

[1] The authors of this paper would first like to express their gratitude to two anonymous reviewers for their insightful suggestions that significantly improved the quality of the manuscript. Furthermore, the authors would like to thank Professor Andrea Pető (Central European University, Budapest, Hungary) and senior researcher Dr. Michael Ochsner (ETH Zürich and FORS Swiss Centre of Expertise in the Social Sciences, Lausanne, Switzerland) for comments that improved the quality of the earlier version of the manuscript. The authors received partial financial support from the Provincial Secretariat for Education, Regulations, Administration and National Minorities – National Communities, Autonomous Province of Vojvodina, Serbia, for the research, authorship, and/or publication of this article.

[2] The territory of the Autonomous Province of Vojvodina was part of the Austro-Hungarian Empire before the Treaty of Trianon in 1920.

[3] Vojvodina is home to 25 different ethnicities; however, in this paper only three of them will be discussed due to their considerable size and the possibility for these ethnic minorities to be taught in schools in their mother tongues.

assessed their knowledge of their mother tongues to be better than their knowledge of the majority Serbian language (ibid.). In their struggle for better employment opportunities, a higher salary, and improved social status, about one-third of high school students from the analysed minorities decide to leave Serbia and study abroad, predominantly in Hungary, Romania, and Slovakia (Takács, 2013; Puja and Badesku, 2009; Šimonji and Černak, 2006).

In relation to the Hungarian ethnic minority in Vojvodina, their countinous educational migration represents a brain drain that has been ongoing for several decades (Gábrity-Molnár, 2009). The arrival into Hungary of qualified professionals with a Hungarian mother tongue and culture from across the border is for Hungary an often unacknowledged benefit, but it represents a loss for the source Hungarian communities (Váradi, 2013: 97). Previous research has identified that Hungarian national policy with its associated instruments is unable to fulfil its most important purpose, which is to safeguard the existence of the intellectual elite within the Hungarian minority community, and help them sustain an adequate livelihood in their country of birth (Erőss et at, 2011: 4).

The situation is similar for the Romanian and Slovak ethnic minority in Serbia as well, who also engage in significant outward educational (and other) migration (Puja and Badescu, 2009, Zlatanović and Marušiak, 2018)

In nationalising states, minorities may feel that the state they are living in is structured and governed in favour of the majority, and that their identity is under threat (Kemp, 2006: 111). Research into the Romanian minority community in Vojvodina has shown that members of minority communities often feel that despite their (legal) equality with the majority and their freedom to use their language in schools, in media such as the press, as well as in public life, they still feel a sense of inferiority that is based on the idea of belonging to another nation (Maran, 2013: 232). In this sense, members of the minority community feel the need to turn to their kin-state. The act of educational migration to external national homelands or kin-states (Kemp, 2006) causes the gradual disappearance of ethnic minorities in their homelands. The goal of this paper is to describe the educational migration of the three above-mentioned ethnic minorities to the EU. The study also explains the causes of educational migration and the low majority language skills of ethnic minorities. Additionally, the study puts specific emphasis on the aspect of gender and identifies the key gender differences behind the career decisions of ethnic minority women and men. The study is important from a Central and Eastern European (CEE) perspective as it gives insight into how the continuous brain drain of ethnic minority students inevitably leads to the weakening and disappearance of the above-mentioned ethnic minority communities.

2. Theoretical framework

2.1 Continuing education and the educational migration of ethnic minority students

Earlier studies have suggested that non-academic factors, particularly socioeconomic background, affect graduates' post-secondary destinations. (Foley, 2001) For example, students from lower-income families were found to be particularly likely to attend less selective institutions, regardless of their level of academic ability, achievement, and aspirations. (Muskens et al, 2019)

Educational migration can be a form of transmigration that takes place when young people move from their home country to another country for the sake of better education (Badikyan, 2011). Such migrants aspire to eventually obtain better career prospects, a higher salary, new professional experiences, and contacts, motivating and interesting jobs, and/or better training facilities (Stukalina et al., 2018). Skill acquisition plays an important role at many stages of an individual's migration (Dustman and Glitz, 2011). Researchers argue that educational migration is unfavorable for the country of origin, as it produces brain drain, which has an economic and social impact (Tremblay, 2005; Lien and Wang, 2005; Teferra, 2005; Váradi, 2013). Others claim the opposite, highlighting the positive effects of a 'brain circulation' that creates knowledge networks, enriching all parties that are involved (Özdenand Schiff, 2006; Walker, 2010; Wooley et al., 2008).

Educational migration from Serbia to Hungary, with a focus on higher education, has become one of the most significant types of migration and is determined by both ethnic and economic factors (Takács et al., 2013: 78). Research conducted by Takács et al. indicated that this kind of educational migration is not transnational (i.e. involving resettlement, return, move to a third country, circulation), but that, in the majority of cases, migration for education constitutes the first step towards permanently leaving the country of origin (ibid.). In Vojvodina, about one-third of ethnic minority Hungarian, Slovak, and Romanian high school students leave Serbia and study abroad, predominantly in their motherland (Takács, 2013; Puja and Badesku, 2009; Šimonji and Černak, 2006), causing a severe brain drain from Serbia, which has been ongoing for several decades (Gábrity-Molnár, 2009). Regarding the effect this has on the kin-state – taking Hungary, for example –, Váradi (2013: 97) states that the former profits since it benefits from educational migrants who speak the Hungarian language – language proficiency being the most commonly required skill of migrants (Raghuram, 2013: 140). The privilege of having such language skills eases social and cultural integration (ibid.). Accordingly, migration for emigration is considered as primarily a form of elite migration, confined for the most part to the upper and middle classes (Brubaker, 1996: 157). When it comes to the Romanian ethnic minority in Vojvodina, most parents enroll their children into the Serbian school system on the assumption that better social integration and obtaining Serbian language skills will make it easier for their children to continue their education (high school and university) (Puja and Badescu, 2009). Such decisions surely have

their advantages, especially with regard to learning Serbian terminology in subjects such as physics, chemistry, mathematics, etc. On the other hand, in such settings the native (Romanian) language is not taught and cultivated further; consequently, the Romanian language skills of ethnic minority Romanians remains at the level of the preschool period (Puja and Badescu, 2009). Paradoxically, when Romanian high school graduates continue their higher education in Romania (which has also been a trend in recent years), the enrolment of these children in Serbian-language classes in Vojvodina is by no means an advantage (Puja and Badescu, 2009).

Vojvodinian Slovaks study in Slovakia as foreign students with special benefits (Zlatanović and Marušiak, 2018). Many of them receive scholarships from the Slovak government that cover tuition costs that would potentially not be covered by Serbia. The interviewees who participated in research undertaken by Zlatanović and Marušiak (2018) generally gave pragmatic reasons for their decision to study in Slovakia – for example, after graduation they would get a job there, and with a diploma earned in the EU they could continue their education or seek employment in a more developed country. Some of them were attracted to specific study programs that universities in Serbia did not offer (Zlatanović and Marušiak, 2018).

2.2 Gender differences in Continuing Education and Education Migration

In the past continuing education has been reserved for boys, who usually received more resources from their parents to pursue their education compared to girls, either because parents expected higher economic returns from their sons' education, or because of traditional gender roles, according to which women do not need, or even should not have, a formal, advanced education (Schneebaum et al., 2015: 240). in even very patriarchal societies such as the Nepali one, parents started supporting grils' education. The latest trends show that in private institutions by investing significant resources into their education (Adhikari, 2013), but typically only in traditionally 'female professions' such as nursing programs.

In today's Europe, there are considerably more girls studying at both the bachelor's and master's level than boys (Eurostat, 2016). Courses in which female students traditionally dominate are increasingly being changed from college courses to three-year undergraduate courses (Dingwall, 2016). Recent years have also seen a focus on campaigns that encourage female students to study science, technology, engineering, and mathematics (STEM) courses (Dingwall, 2016).

Studying in a foreign country might be appealing to women as they may see it as a way of exercising freedom and independence, as opposed to being under surveillance by their parents and other members of society at home (Dhungel, 2019: 362). Opportunities for student mobility are especially important for women (Juhász et al., 2005: 177), although the level of participation of female staff and faculty mobility at university decreases after graduation, usually due to family and care responsibilities (Juhász et al., 2005).

The Erasmus program student has significantly enhanced mobility and opened up opportunities for educational migration in Europe. In 2000–2001, 59 per cent of all Erasmus students were female (Juhász et al., 2005: 177). The decision to go abroad may be affected by language skills, which play an important part in the considerations that precede a decision to go abroad (Juhász et al., 2005).

Gender differences in educational migration in the Carpathian basin among ethnic minority students have previously received little scholarly attention. The only gender differences that have been recorded among ethnic minority students is that girls are reported to have a slightly greater desire to continue their studies than boys (Papp, 2003).

2.3 Minority language education and the language barrier

Although linguistic diversity remains entrenched as one of the key values of the European project, the EU has relatively limited competence to manage this issue (Kraus and Kazlauskaite-Gürbüz, 2014: 524). In this sense, every country autonomously deals with the issue of minority languages.

Language may be important to a group at a symbolic level (Jaspal, 2009: 18) and is strongly connected to one's ethnic identity. If language is separated from cultural context, it does not remain a community language; only functioning as such can its existence be assured (Dołowy-Rybińska, 2015: 260). Language is an important component of maintaining a separate ethnic identity. Attempting to establish a cohesive national identity may be detrimental to minority groups' identity, since an important component of self-identity, namely language, is often at stake (De Vos, 1995). The official language is bound to the state and 'integration into a single "linguistic community," which is a product of the political domination that is endlessly reproduced by institutions capable of imposing universal recognition of the dominant language' (Bourdieu, 1991: 46). When it comes to minority groups, education in one's mother tongue is crucial for the preservation of national identity. The importance of education in one's mother tongue is increasingly emphasized in multilingual regions, as teaching and learning in one's mother tongue improves learning outcomes in primary schools (Seid, 2016). Mother tongue education plays an important role in preserving the mother tongue, as in addition to the linguistic dimension, it has an ethnic dimension. The 'imagined community future' also requires the use of the mother tongue (Papp, 2015: 51). National minorities tend to seek some form of institutionalization of mother tongue education, and use their own language at school as a means of preventing or reducing language assimilation (ibid.).

With regard to the different ethnic minorities in Europe, Swedish-speaking Finns have no clear incentive for a 'mother country'-type of affiliation to Sweden (Morning and Husband, 2007: 95). The mother tongue education (Mansika and Holm, 2011) and media (Morning and Husband, 2007) of the former are quite strong in Finland. In Lithuania, the Law on Language introduced in 2011 does not favor the Polish minority, as since 2013 all high-school students have been required to pass a unified Lithuanian-language exam, with which Polish students

have typically struggled after having 700 fewer hours of Lithuanian-language lessons than their counterparts from Lithuanian schools (Barwiński and Leśniewska, 2014). The Slovak community in Hungary has 'Slovak national education'; the term refers to a network of schools that educate members of the Slovak community in Hungary and aim to preserve and develop the Slovak language (Šimonji and Černak, according to Ondrejovič, 2006). However, this has failed to avert progressive linguistic assimilation in the family environment, weak national awareness, deficiencies in the system of learning the Slovak language at an earlier period, and the dominance of the Hungarian language in the modern school system, but has increased interest in learning foreign languages (Šimonji and Černak, according to Homišinová, 2006). Minority language education is sometimes associated with later risks for minority students. Filipović, Vučo and Đurić assesses this issue in Serbia, stating that the teaching of all classes in primary and secondary education in a minority language, with only a few hours per week of Serbian as a majority language, has created generations of unbalanced bilinguals, characterized by a very low level of Serbian proficiency (Filipović et al., 2007). In the first and second year of elementary school there are 72 classes of Serbian for minority students, and 180 classes of Serbian for majority students, while in the third and fourth year of elementary school there are 108 Serbian language classes per year for ethnic minority students.[4] In addition to the low number of majority classes in school, young people living in the north of Bačka, where the majority of Hungarians live in Serbia, have typically not wanted to learn the state language since the Yugoslav wars of the 1990s (Nađ, 2006: 448).[5] Consequently, they face difficulties during their post-secondary education in Serbia, and/or struggle to find satisfactory employment, which by default requires knowledge of Serbian (Filipović et al., 2007). These ethnic minority students first need to overcome the language barrier (i.e., to learn Serbian) when starting their studies, which requires time, effort, and sacrifice (Lendák-Kabók, 2014). Minority students around Europe also experience different challenges after finishing high school (Khattab, 2018); the above-discussed minorities are not exceptional in this sense. In Britain, members of (immigrant) ethnic minority communities demonstrate high levels of motivation and enrollment in higher and further education (Lessard-Phillips, 2018). The situation is quite different in Italy, where only a minority of non-Italian secondary school graduates continue their studies at the university level compared to their Italian peers, (Mantovani et al., 2018). A study of Turkish and Roma ethnic minorities living in Bulgaria showed that they had lower education levels and lower employment rates than their Bulgarian majority peers (Trentini, 2014).

[4] Bylaw on the curriculum for the first, second, third and fourth grade of primary education and Bylaw on the curriculum for the third grade of primary education (Official Gazette of the Republic of Serbia, no. 1/2005, 15/2006, 2/2008, 2/2010, 7/2010, 3/2011 – other bylaw 7/2011 – other bylaw, 1/2013, 11/2014, 11/2016 and 12/2018)

[5] With the start of the Yugoslav wars, some intolerance arose among refugees and the majority nation towards sub-state national groups that were living in Vojvodina. This was mainly manifested through low-intensity, inter-ethnic conflicts within the younger population, or in the public scolding of members of ethnic minorities who used their language in the streets and on public transport.

Minority language education can be analyzed at either the macro (government) or micro level (family). Although bilingual education might be the government approach to preventing/lessening the language barrier, there are a wide variety of often conflicting ideologies, theories, policies, and practices surrounding bilingual and multilingual education throughout the world (Wright et al, 2015). In some cases, bilingual education may even be misused to limit the access and opportunities of linguistic minority students (Wright et al, 2015) – this has been the case in Ukraine, for example, affecting the Hungarian minority population (Papp, 2017). Some parents enroll their children in majority-language schools, as they feel that a Hungarian-language education does not provide as many opportunities as Ukrainian-language education (which does allow for optional Hungarian lessons). In this way, children 'learn to read and write in Hungarian, too,' but their competences develop in the official (majority) language as well, which is important if they want to 'exist,' prosper, and build a career at home (Papp, 2017: 97). According to data from a survey published recently, the majority of those participating in state-language education are born in interethnic (mixed) marriages (Dombos, 2011). Intermarriages, the level of education of parents, and socio-economic status affect majority-language school choice (Papp, 2017: 92).

Based on the above-mentioned theoretical background, the authors identified the following hypotheses:

H1: There are gender differences in the career choices of ethnic minority high school graduates (i.e. in whether they aspire to complete higher education).

H2: There are gender differences with respect to the country in which the ethnic minority students under examination plan to continue their education (i.e. in Serbia or in a nearby EU Member State).

H3: The language barrier has a significant impact on the choice of country of further education (i.e. in Serbia or in a nearby EU Member State).

These hypotheses are relevant, as the shift in motivation for the educational migration of ethnic minority students finishing their secondary education in Vojvodina and its gender aspects has not been previously researched. Additionally, no detailed research has investigated the interplay between the language barrier (i.e. a lack of majority [Serbian] language skills) and the above-described educational migration to nearby EU countries, nor the gender aspects of that trend. This research focuses on three sub-state national groups: Hungarian, Slovak, and Romanian. This choice was made because, on the one hand, those groups are quite numerous (Hungarian is the most populous minority group, Slovak is the second, and Romanian is the fifth),[6] and on the other hand, those national groups can access elementary and secondary education in their mother tongues in Serbia.

[6] The third national group is Croatian and the fourth is Roma; however, this research did not cover those national groups because the Croatian language is very similar to Serbian. The Roma minority was not included because their sub-state minority group does not have primary and secondary education in its mother tongue in Serbia.

3. Method

In this section an overview of the data collection and analytical methodology, as well as the ethical aspects of the research, will be presented.

3.1 Sample, procedure and ethics

The total sample was determined using the quota sampling method (Biljan-August et al., 2009) and consisted of 2,192 high school students: 1,119 females (51 per cent) and 1,073 males (49 per cent). The average age of the respondents was 18 years. Ethnic membership structure was the following: Hungarian 1,951 (89 per cent), 175 Slovak (8 per cent), and 66 Romanian (3 per cent). These students were in their final year at high school, a critical period for making decisions about their future, career choices, and further education.

The sample was collected in the following 16 municipalities of AP Vojvodina, where there was a sizeable community of the ethnic minorities under investigation: Ada, Alibunar, Bačka Topola, Bački Petrovac, Bečej, Čoka, Kanjiža, Kovačica, Novi Kneževac, Novi Sad, Senta, Sombor, Subotica, Temerin, Zrenjanin, and Vršac.[7] The questionnaire was filled in in 26 high schools in total.

The pupils were finishing high school in their mother tongues. The entire population of the ethnic minority Hungarian, Slovak, and Romanian high school graduates in the 2013/14 and 2014/15 school years numbered 3,311[8] students in Vojvodina; therefore, the sample covered 66.20 per cent of all students. The research was conducted in two consecutive school years; specifically, in May 2014 and in April 2015, as these were the last months of the students' secondary education before their graduation in June. It should be noted that the research focused on students who studied in ethnic minority languages, while those who were enrolled in majority language schools were not included.

After obtaining the principals' approval, the researcher attended one of the classes during which students filled in the paper-based questionnaires. All three types of high schools that operate in the languages of the three ethnic minorities were included in the research – namely, three-year vocational, four-year vocational, and four-year grammar schools.

3.2 Instruments

For the purpose of the study, a questionnaire was built, consisting of 20 questions that can be grouped into the following themes of interest:

[7] The names of the municipalities are given in the Serbian language as a state language; however, the ethnic minority students used the names of the municipalities in their mother tongue when filling in the questionnaire.

[8] Data was provided by the Provincial Secretariat for Education, Regulations, Administration and National Minorities – National Communities, AP of Vojvodina and was used only for the purpose of this research.

Demographic information consisting of gender, ethnicity, school, and school year (i.e. third or fourth grade); mother tongue of respondents (i.e. Hungarian, Slovak, or Romanian); self-assessed Serbian (majority) language skill level; plans for continued (i.e. higher) education; location of chosen higher education institution (Hungary, Slovakia, Romania, or Serbia), as well as thoughts about the career choices women have in pedagogy and/or in technical fields.

Most questions were closed-ended, multiple choice format, but eight open-ended choices and one open-ended question were included. Respondents were asked to fill in by hand the name of the chosen higher education institution. Self-assessed knowledge of the Serbian language was measured using a seven-point Likert scale that ranged between 'not at all' and 'very good,' and the frequency of use of the Serbian language with a five-point Likert scale ranging between 'less than once a week' and 'several times a day.'

3.3 Data analysis

The data analysis was performed using IBM's Statistical Package for the Social Sciences (SPSS) version 16 for Windows. Given the fact that the majority of variables were defined as categorical data, nominal, cross-tabulation analysis, and Pearson's Chi-Square test were mainly utilized. In the case of continuous variables (e.g. assessment of knowledge and language-use frequency), one-way ANOVA was used to analyze the differences among group means.

3.4 Ethics

Use of the paper-based questionnaires was authorized by the principals at each secondary school involved in this research. Students were informed about the goals of the research, and given the option to opt out from filling in the questionnaire. Questionnaires were anonymous, i.e. no names, addresses, or other personally identifiable information of students were recorded. Only the location, name, and type of secondary school were recorded, as this information was relevant in the context of the research.

4. Results

In the next sections, the authors analyze the education migration patterns of Vojvodinian ethnic minority students. We present the results of our gender-sensitive analysis of (1) students' aspirations to continue (not continue) education, (2) the extent, destination, and motivation behind educational migration to nearby EU countries, as well as (3) the interaction between the language barrier and educational migration.

4.1 To study or not to study?

In Section 2, the first hypothesis was formulated (H1) around the notion that there are gender differences between the career choices made by ethnic minority students finishing secondary education in Vojvodina, the northern province of the Republic of Serbia. As elsewhere in Europe (Eurostat, 2016), the sample showed that more girls who are finishing secondary education (83.6 per cent) aspire to continue their studies compared to boys (73.1 per cent), a finding which is in line with the results of previous research done in Vojvodina among ethnic minority Hungarian students (Papp, 2003). We can mention here that a significant percentage of boys and girls do not want to continue their education at all, which fact may be connected to their parents' education level, which has been hypothesized to influence young people's choice of whether to pursue post-secondary education (Foley, 2001).

The reasons given by students who did not wish to continue their studies after secondary education were examined as well, and we found that there were significant gender-related differences in these ($\chi^2(6)=29.70$; $N=673$; $p<0.001$). Most students who did not plan to continue their education wanted to find a job. As shown in Table 1, male students more often agreed with the statement 'a high school degree is sufficient.' This outcome is markedly different to the situation with other ethnic minorities in the European geographic context, especially first- or second-generation immigrants, who usually understand the need for and aspire to complete higher education (Lessard-Phillips et al., 2018).

Very few students stated that they did not want to enroll in a higher education institution because of the language barrier, which would have indicated that they do not have adequate Serbian language skills. There were no significant gender differences between boys' and girls' answers regarding language skills.

Almost two-thirds (63.6 per cent – rows 1 and 2 in Table 1) of the girls who were not planning to continue their higher education claimed that they wanted to get a job or had financial difficulties. Although in absolute terms the number of girls and boys who referred to financial difficulties was quite similar, more than one in five girls who did not aspire to complete higher education claimed that their lack of motivation was caused by some form of financial barrier. The relatively high number of ethnic minority students stating that they wanted to get a job or that financial difficulties barred them from higher education points to class-related issues, considering the fact that both state-funded higher education and subsidized public transport are quite affordable in Serbia (based on the authors' own experience with commuting and obtaining higher education degrees without the need to pay any tuition fees).

Table 1 – Reasons for lack of aspiration to continue studies

	Female		Male		Total	
	Number	[%]	Number	[%]	Number	[%]
I want to get a job	106	42.4	198	46.81	304	45.2
Financial barrier, i.e. lack of funds	53	21.2	45	10.64	98	14.6
No courses match my interests	19	7.6	33	7.8	52	7.7
A high school degree is sufficient	15	6	64	15.13	79	11.7
Language barrier	15	6	25	5.91	40	5.9
Low grades in high school	7	2.8	21	4.96	28	4.2
Multiple answers	35	14	37	8.75	72	10.7
Total answered	250		423		673	100

4.2 Where to study?

In order to verify our second hypothesis (H2), we investigated the gender aspect of the long-standing educational migration of ethnic minority students who are finishing their secondary education in Vojvodina. Our goal was to determine the extent and causes of the educational migration of ethnic minority students to nearby EU countries. Therefore, we first analyzed where the respondents planned to continue their higher education.

Findings are shown in

Table 2. 684 students (out of 2192) intended to study abroad only, which is a staggering 39.6 per cent (see row 2 in Table 2 for details). The finding that almost 40 per cent of ethnic minority pupils who were finishing high school in Vojvodina planned to study abroad is higher than that identified in previous studies (Takács, 2013). Migration for education would not be an issue if the students returned to Serbia after completing their studies, but multiple decade-long trends show that most of them will not (Takács et al., 2013). Additionally, a smaller number of respondents (from rows 3 to 5 in Table 2) also plan to leave Serbia if they gain entry to a higher education institution abroad.

Table 2 - Gender differences in intended country of future education

	Female		Male		Total	
	Frequency	[%]	Frequency	[%]	Frequency	[%]
Serbia	375	40.5	309	38.6	684	39.6
Hungary, Slovakia, or Romania	369	39.8	286	35.7	655	37.9
I will try to apply both in Serbia and in my country of ethnic origin, but I will opt for my country of ethnic origin if I pass the entrance examination	70	7.6	76	9.5	146	8.4
Do not know yet	113	12.2	130	16.2	243	14.1
Total	927		801		1728	100

Statistical analysis of the data showed significant gender differences in the career aims of respondents ($\chi^2(3)=9.18$; N=1728; $p<0.05$). We found that female students are more determined about their career choices, as the total number of undecided girls answering 'Do not know yet' or not answering at all was slightly lower than that of boys. We found that more girls desired to continue their studies in Hungary, Slovakia, or Romania (see row 2, Table 2) than boys. If we add to these numbers those students who will try to gain entry to an institution of higher education in both Serbia and another country but will continue in the country of their ethnic origin if accepted, the proportion is even larger. It is important to note that there were no gender differences in favor of boys as regards pursuing education abroad, which may represent a greater financial burden on parents. Therefore, we conclude that parents were not expecting a higher economic return on their sons' education (Schneebaum et al., 2015).

Although the questionnaires were filled in only one or two months before the deadline to submit applications to a higher educational institution either in Serbia or abroad, a greater number of boys (16.2 per cent) were undecided. This might have a detrimental effect on the future prospects of these students and their social groups as well, as they will either not continue their education, thereby putting themselves in an inferior position in the Serbian labor market, or make uninformed and rushed decisions at the very last moment. Fortunately for the male students, even if they do make a decision at the very last minute, the chances are high that they will choose a more 'masculine' track (technical college or university) and thereby be in a better starting position after graduating. The undecided girls (12.2 per cent; see row 4 in Table 2 above) might not fare as well. Due to their general inclination towards the social sciences and humanities (SSH), in combination with hastily made decisions, they may end up in areas with a lower number of vacancies and lower average salaries.

Next, we analyzed why students chose to stay and study in Serbia, and here we also found gender differences ($\chi^2(5)=16.93$; N=1015; $p<0.005$). Our findings (Table 3) indicate that most students want to remain and study in Serbia because,

in their opinion, the Serbian higher education system will give them a high level of knowledge. Male students opt to study in Serbia because of financial problems more often than female ones, as well as because of ties with friends. On the other hand, female students opt for Serbia because they think they will succeed more easily with a Serbian diploma at home.

Table 3 - Reasons for choosing a higher education institution in Serbia

	Female		Male		Total	
	Frequency	[%]	Frequency	[%]	Frequency	[%]
Financial issues disallow studying abroad	35	6.6	52	10.8	87	8.6
Will succeed better with a Serbian degree	63	11.8	48	9.9	111	10.9
Family bonds	46	8.6	42	8.7	88	8.7
Bonds with friends	34	6.4	54	11.2	88	8.7
Will study in Serbia if I fail entry exam abroad	68	12.8	69	14.3	137	13.5
Academic education in Serbia provides excellent knowledge	286	53.8	218	45.1	504	49.7
Total	532		483		1015	100

We also examined why students choose to study outside Serbia. Results are shown in Table 4. Somewhat surprisingly, we did not find significant gender differences between the answers (x^2=2.06(4); N= 887; p=0.724).

Table 4 - Reasons for choosing higher education in Hungary, Slovakia, or Romania

	Female		Male		Total	
	Frequency	[%]	Frequency	[%]	Frequency	[%]
Insufficient knowledge of the Serbian language	77	16.1	70	17.1	147	16.6
EU diploma is better	182	38.1	165	40.3	347	39.1
I want to work in the country of my ethnic origin	63	13.2	47	11.5	110	12.4
Educational profile which I want to pursue does not exist in Serbia	37	7.7	24	5.9	61	6.9

	Female		Male		Total	
	Frequency	[%]	Frequency	[%]	Frequency	[%]
Something else	119	24.9	103	25.2	222	25
Total	409		478		887	100

The main reason for leaving Serbia to study in a nearby EU Member State was, for both male and female students, the desire to obtain a university degree from a country within the EU. Earlier studies typically identified language barriers as the primary source of motivation for migration. This reason seems to have been superseded since Hungary, Slovakia, and Romania joined the EU. However, our analysis showed that language barriers were still a major source of concern, as this factor was quoted as the second most frequent reason for leaving.

4.3 Language barriers

Students from ethnic minority communities have limited higher education options in their mother tongue in Serbia (namely, the departments for Hungarian, Slovak, and Romanian language and literature at both the University of Novi Sad [UNS] and at the University of Belgrade, the state-funded Hungarian Language Teachers Training Faculty in Subotica [part of the UNS] and a number of courses taught in Hungarian at the Faculty of Economics, also in Subotica). Partial or complete Hungarian-language tuition is offered outside the University of Novi Sad in Vojvodina at the Subotica Tech College, and at the privately-owned Educons University. Slovak- and Romanian-language tuition is also offered at the Faculty of Philosophy in the native language departments at the Teacher Training Faculty in Sombor. There was also once a Study Program in the Slovak language in Bački Petrovac, but this has since closed due to an insufficiency of staff. In Bački Petrovac, the St. Elisabeth University of Health and Social Work Bratislava, Slovakia, EU, is operated by the Slovak government. At the University of Belgrade, there is a study program called Professor of Classroom Teaching that is taught in Romanian in Vršac. Such a limited choice of courses might explain why respondents stated that their insufficient knowledge of the Serbian language was the second most frequent reason for leaving Serbia to study abroad (see row 2 in Table 4). That lack of Serbian language proficiency might be partly explained by the Yugoslav civil wars, which led to increased nationalism and segregation, even in Vojvodina, which was spared armed conflict apart from the NATO bombings in March to June 1999. Because of the above-mentioned segregation, children from ethnic minorities do not often need to master the Serbian language before finishing their secondary education, especially in municipalities in which they are the majority ethnic group.

We decided to investigate the causes and effects of this language barrier with our questionnaire. Ninety-seven per cent of respondents indicated that their

ethnic minority language was their mother tongue. A relatively small number of students explained that they had two mother tongues, typically the ethnic minority language and Serbian. Most of these exceptions involved intermarried families.

We asked students how often they speak Serbian each week. More than 30 per cent (rows 2 and 3 in Table 5) of our respondents used Serbian no more than once a week. That means that some students managed to get by almost without ever using the majority language.[9] There was no significant gender-related difference in the frequency of majority language use.

Table 5 – Weekly frequency of Serbian language use

	Female		Male		Total	
	Frequency	[%]	Frequency	[%]	Frequency	[%]
No answer	5	0.4	7	0.7	12	0.5
Less than once a week	205	18.3	218	20.3	423	19.3
Once a week	161	14.4	115	10.7	276	12.6
Several times a week	337	30.1	285	26.5	622	28.3
Once a day	59	5.3	66	6.1	125	5.7
Several times a day	352	31.5	385	35.8		33.6
Total	1119		1076		2195	100

In the questionnaire, students were asked to self-assess their skills in both their mother tongues and in Serbian. Results are shown in Table 6 (below). A majority of the ethnic minority secondary school graduates spoke good, very good, or excellent Serbian (56.9 per cent of girls, and 52.9 per cent of boys); a little more than half of all respondents. The language barrier is greater for male students, meaning they are more likely not to opt for higher education at all (as shown in Table 1, where male students more often chose the option 'a high school degree is sufficient' compared to female ones). The self-assessed Serbian language skills of the rest of the respondents (around 45 per cent) were inadequate to permit them to enroll in a higher education study program in Serbian.

Table 6 – Self-assessed language skills

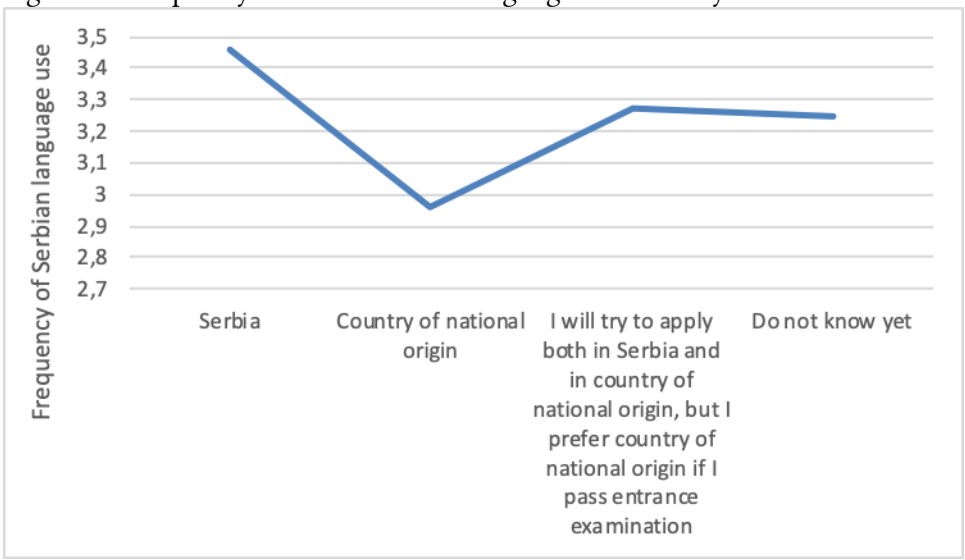
	Female		Male	
	Mother tongue	Serbian	Mother tongue	Serbian
No answer	0.4%	0.4%	0.8%	1.2%
Not at all	0.4%	2.2%	0.5%	4.7%
Do not speak, but	0%	5.1%	0.1%	5.8%

[9] We did not specifically ask students whether they watched TV or read books or other written materials in Serbian. Even if they did (which is highly unlikely), but spoke very rarely, their spoken Serbian skills would be limited.

	Female		Male	
	Mother tongue	Serbian	Mother tongue	Serbian
understand				
Only a few words	0.2%	7.9%	0.5%	9.4%
Not so well	0%	27.5%	0.6%	26.1%
Good	1.6%	27.8%	3.2%	26.3%
Very good	2.9%	18.1%	3.1%	15.4%
As a mother tongue	94.5%	11.0%	91.3%	11.2%

The level of Serbian language proficiency appeared to influence where respondents were planning to continue their education. In order to examine this proposition, a one-way ANOVA with a Bonferroni post-hoc test was used (the dependent variable was the frequency of use of the Serbian language – see the Y axis in Figure 1, and the grouping variable was the location of the chosen higher education institution [Serbia, EU Member State, etc.]).

Figure 1 - Frequency of use of Serbian language and country of further education



Significant correlation was identified between the frequency of Serbian language use and the intended country of further education ($F(4.2190)=8.94$; $p<0.01$). Participants who used the Serbian language less frequently were more liable to want to study outside Serbia. This confirms our third hypothesis (H3); namely, that a lack of Serbian language skills significantly impacts the career choices of ethnic minority secondary school graduates, and is an important driving force behind the education migration faced by their communities.

5. Conclusion

We have presented research into the status and career choices of Hungarian, Slovak, and Romanian ethnic minority high school graduates in Vojvodina. We were particularly interested in the higher education aspirations of the target group in terms of the desired destination (Serbia or neighboring/nearby EU Member States, which represent their ethnicity-based homeland) and the effect of the language barrier on outward educational migration towards nearby EU states. We found that almost 40 per cent of ethnic minority high school graduates intend to leave Serbia to study abroad. If we add to this figure those who will try to pass an entrance exam in both countries (for example, in both Serbia and Slovakia) and whose aspiration is to move to the neighboring country if successful, the number is even higher. As most emigrants will not return (Takács et al., 2013), this represents a significant brain drain that will affect the ethnic minority communities and Serbia as well. We have shown that language barriers may no longer be the most important driving force behind the multiple-decades-long educational migration of ethnic minority students living in Vojvodina. According to our findings, the most important reason for ethnic minority students to leave Serbia is the pull of a higher education degree from an EU-based institution, which grants them immediate access to the EU's integrated labor market, and the potential for increased social status. The language barrier is however relativized, as there is strong overlap between the economic and linguistic elements of the phenomenon under analysis.

The second reason for students leaving their country of origin is the language barrier; i.e. a lack of Serbian language proficiency that hinders entry into the Serbian higher education system, in which most study programs are available in the Serbian language only. Reasons for leaving the country students were born in are also likely to be linked to social status and empowerment. Respondents felt that obtaining a higher education degree in an EU-based institution might allow them to earn more and obtain higher social status than their peers who stay at home. Additionally, if the former continued their studies in Serbia, the language barrier would place them in an inferior position compared to their Serbian peers. This inferiority might even extend to their entry into the labor market in Serbia in which certain professions are reserved for well-integrated individuals with excellent Serbian language skills.

We identified significant gender differences in educational aspirations and migration patterns. First, our results confirmed previous research (Papp, 2013) that found that more girls who finish secondary education aspire to continue their studies compared to boys. In relation to not continuing their post-secondary studies, male students more frequently claimed that a high school degree was sufficient, while girls not planning to continue their education claimed that they wanted to get a job or had financial difficulties. We also found that almost every third girl wanted to continue her studies in a nearby EU country, whereas this proportion was significantly lower for boys. Boys faced greater language barriers (i.e. weaker Serbian language skills), which meant that they might not opt for

higher education at all. Additionally, we found that female students are more determined about their career choices: the total number of undecided girls (i.e. those not knowing where they would continue their studies) was significantly lower than that of boys. This lack of timely decision making might have a detrimental effect on the future prospects of both genders and their social groups. The latter will either not continue their education, thereby putting themselves in an inferior position on the Serbian labor market, or will need to make uninformed and rushed decisions at the very last moment.

As far as future research is concerned, the authors have identified two ways to potentially extend this research. First, they intend to 'close the circle' by extending this questionnaire-based study to the entire Carpathian basin and analyzing the status of different minorities in parts of Serbia, Hungary, Romania, Ukraine, Slovakia, and Croatia. Second, they intend to work towards implementing some related measures (e.g. career orientation for ethnic minority high school graduates) and subsequently repeat the questionnaire-based research to measure the impact of these measures.

References

Adhikari, R. (2013) Empowered wives and frustrated husbands: Nursing, gender and migrant Nepali in the UK. *International Migration, 51*(6): 168–179. https://doi.org/10.1111/imig.12107

Badikyan, T. (2011) *Educational migration from Armenia: A case study of a group of OSF and DAAD beneficiaries.* Master Thesis. Central European University.

Barwiński, M. and Leśniewska, K. (2014) The contemporary situation of Polish minority in Lithuania and Lithuanian minority in Poland from the institutional perspective. *Geographia Polonica, 87*(1): 27–46. https://doi.org/10.7163/gpol.2014.2

Biljan–August, M., Pivac, S. and Štambuk, A. (2009) *Statistička analiza u ekonomiji (Statistical Analysis in Economics).* Rijeka: Ekonomski fakultet Sveučilišta u Rijeci.

Bourdieu, P. (1991) *Language and Symbolic Power.* Cambridge, MA: Harvard University Press.

Brubaker, R. (1996) *Nationalism Reframed: Nationhood and the National Question in the New Europe.* Cambridge: Cambridge University Press.

Bylaw on the curriculum for the first, second, third and fourth grade of primary education and Bylaw on the curriculum for the third grade of primary education (*Official Gazette of the Republic of Serbia*, no. 1/2005, 15/2006, 2/2008, 2/2010, 7/2010, 3/2011 – other bylaw 7/2011 – other bylaw, 1/2013, 11/2014, 11/2016 and 12/2018)

De Vos, G. A. (1995) Ethnic Pluralism: Conflict and Accommodation. The Role of Ethnicity in Social History. In Romanucci-Ross, L. and De Vos, G. A. (eds.) *Ethnic Identity: Creation, Conflict, and Accommodation.* Walnut Creek, CA: AltaMira. 15–47.

Dingwall, S. (2016) Why do more girls than boys go on to higher education? *The Knowledge Exchange Box Blog.* Available at https://theknowledgeexchangeblog.com/2016/04/27/why-do-more-girls-than-boys-go-on-to-higher-education/ Accessed: 06-05-2020.

Dołowy-Rybińska, N. (2015) Dilemmas of identity and language among young Kashubs in the light of 21st-century cultural change. In Schrammel-Leber, B. and Korb, Ch. (eds.) *Dominated Languages in the 21st Century*. Graz: Grazer Linguistische Monographien. 246–263.

Dombos, F. (2011) *Asszimilációs folyamatok az erdélyi, felvidéki, kárpátaljai és vajdasági magyarság körében 1996–2011 (Assimilation Processes among Hungarians in Transylvania, Slovakia, Subcarpathia and Vojvodina, 1996–2011).* Fókusz Intézet. Available at http://www.kmkf.hu/tartalom/assszimilacio.pdf

Dustmann, C.and Glitz, A. (2011) Migration and education. In Hanushek, E. A., Machin, S., Woessmann, L. (eds.) *Handbook of the Economics of Education,* vol. 4. Amsterdam: North Holland. 327–439. https://doi.org/10.1016/B978-0-444-53444-6.00004-3

Erőss, Á., Filep, B., Tátrai, P.,Rácz, K., Váradi, M. M. and Wastl-Walter, D. (2011) Tanulmányi célú migráció, migráns élethelyzetek: vajdasági diákok Magyarországon (Educational migration, living as migrants: Students from Vojvodina in Hungary). *Tér és Társadalom, 25*(4): 3–19. https://doi.org/10.17649/tet.25.4.1936

European Commission (2000) *Survey into the Socioeconomic Background of Erasmus Students.* Brussels: European Commission.

Eurostat (2020) *Tertiary Education Statistics.* Available at https://ec.europa.eu/eurostat/statistics-explained/index.php/Tertiary_education_statistics#Participation_of_men_and_women_in_tertiary_education Accessed:03-06-2019.

Filipović, J., Vučo, J. and Đurić, Lj. (2007) Critical review of language education policies in compulsory primary and secondary education in Serbia. *Current Issues in Language Planning, 8*(1): 222–242. https://doi.org/10.2167/cilp103.0

Foley, K. (2001) *Why Stop after High School? A Descriptive Analysis of the Most Important Reasons that High School Graduates do not Continue to PSE.* Ottawa: Canadian Millennium Scholarship Foundation.

Gábrity-Molnár, I. (2009) Továbbképzési esélyek a kisebbségi létben – A vajdasági magyarok esélyegyenlőségének példáján (Chances of continuig education: The example of equal opportunities of Hungarians in Vojvodina). In Káich, K. (ed.) *Az esélyegyenlőség és a felzárkóztatás vetületei az oktatásban – Általános kérdések – (anya)nyelvi oktatás.* Újvidék: Magyar Tannyelvű Tanítóképző Kar. 15–25.

Jaspal, R. (2009) Language and social identity: A psychosocial approach. *Psych-Talk, 64:* 17–28.

Juhász, B., Pető, A., Van der Sanden, J. and Waaldijk, B. (2005) Educational migration and gender: Women's studies students' educational mobility in Europe. In Griffin, G. (ed) *Doing Women's Studies: Employment Opportunities, Personal Impacts and Social Consequences.* London: Zed Books. 168–194.

Kemp, W. (2006) The triadic nexus: lessons learned from the status law. In Ieda, O. (ed.) *Beyond Sovereignty: From Status Law to Transnational Citizenship.* Sapporo: Slavic Research Center (Hokkaido University). 109–126.

Khattab, N. (2018) Ethnicity and higher education: The role of aspirations, expectations and beliefs in overcoming disadvantage. *Ethnicities, 18*(4): 457–470. https://doi.org/10.1177/1468796818777545

Kraus, P. and Kazlauskaite-Gürbüz, R. (2014) Addressing linguistic diversity in the European Union: Strategies and dilemmas. *Ethnicities, 14*(4): 517–538. https://doi.org/10.1177/1468796814528693

Kymlicka, W. (2007) *Multicultural Odysseys. Navigating the New International Politics of Diversity.* Oxford: Clarendon Press.

Lendák-Kabók, K. (2014) Magyar egyetemi hallgatónők Vajdaságban – az Újvidéki Egyetem tudományterületeinek helyzetképe a társadalmi nemek szempontjából (Hungarian female students in Vojvodina: A gender-focused survey of disciplines at the University of Novi Sad). In Németh, F. (ed.) *Régió és kultúra.* Szabadka: Újvidéki Egyetem, Magyar Tannyelvű Tanítóképző Kar. 136–147.

Lendák-Kabók, K. and Lendák, I. (2017) Language barrier faced by Hungarian women students and teaching staff in the higher education system in Serbia. In Filipović, J. and Vučo, J. (eds.) *Minority Languages in Education and Language Learning: Challenges and New Perspectives.* Belgrade: Faculty of Philology. 281–295. https://doi.org/10.18485/fid.2017.7.ch16

Lessard-Phillips, L., Boliver, V., Pampaka, M. and Swain, D. (2018) Exploring ethnic differences in the post-university destinations of Russell Group graduates. *Ethnicities, 18*(4): 496–517. https://doi.org/10.1177/1468796818777543

Lien, D. and Wang, Y. (2005) Brain drain or brain gain: A revisit. *Journal of Population Economics, 18*(1): 153–163. https://doi.org/10.1007/s00148-003-0174-x

Mansikka, J. E. and Holm, G. (2011) Teaching minority students within minority schools: Teachers' conceptions of multicultural education in Swedish-speaking schools in Finland. *Intercultural Education, 22*(2): 133–144. https://doi.org/10.1080/14675986.2011.567071

Mantovani, D., Gasperoni, G. and Albertini, M. (2018) Higher education beliefs and intentions among immigrant-origin students in Italy. *Ethnicities, 18*(4): 603–626. https://doi.org/10.1177/1468796818777549

Maran, M. (2013) Rumuni u Banatu. Osobenosti identiteta (Romanians in the Banat: Elements of identity). *Zbornik radova Etnografskog instituta SANU – Kulturna prožimanja: antropološke perspektive, 28:* 229–238.

Moring, T. and Husband, C. (2007) The contribution of Swedish-language media in Finland to linguistic vitality. *International Journal of the Sociology of Language, 187–188:* 75–101. https://doi.org/10.1515/ijsl.2007.051

Muskens, M., Frankenhuis, W. E., & Borghans, L. (2019). Low-income students in higher education: Undermatching predicts decreased satisfaction toward the final stage in college. Journal of youth and adolescence, 48(7), 1296-1310. doi: 10.1007/s10964-019-01022-1

Nađ, I. (2006) Nekoliko obeležja migracije vojvođanske elite (Migration patterns of the elite in Vojvodina). *Zbornik Matice Srpske za društvene nauke, 121:* 445–456.

Özden, C. and Schiff, M. (2007) *International migration, economic development and policy*. Washington, DC: World Bank and Palgrave Macmillan.

Papp, Z. A. (2003). Igényfelmérő kutatás a vajdasági magyar fiatalok továbbtanulási hajlandóságáról (A survey of demands on the willingness to continue studies of young Hungarians in Vojvodina). In Bárdi, N. and Fedinec, Cs. (eds.) *Etnopolitika. A közösségi, magán -és nemzetközi érdekek viszonyrendszere Közép – Európában.* Budapest: Teleki László Alapítvány.

Papp, Z. A. (2014) Selecting a majority-language school by Hungarian minority students, or from PISA results to discourses in the Carpathian Basin. *Minority Studies, 17:* 87–99.

Papp, Z. A. (2015). Nyelvi-etnikai, nem bevándorló kisebbségi tanulók iskolai teljesítménye a PISA-felmérésekben (Perfirmance of linguistic and ethnic non-migrant minority students at PISA tests). *Educatio, 24*(2): 50–63.

Papp, Z. A. (2017). Oktatási részvétel és továbbtanulási szándékok a Kárpát-medencei magyar fiatalok körében (Participation in education and further education aims of young Hungarians in the Carpathian Basin). In Papp, Z. A. (ed.) *Változó kisebbség: Kárpát-medencei magyar fiatalok A GeneZYs 2015 kutatás eredményei.* Mathias Corvinus Collegium, Tihanyi Alapítvány and MTA Társadalomtudományi Kutatóközpont Kisebbségkutató Intézet. 341–366.

Popov S. and Radović, D. (2015) *Unapređivanje obrazovanja na više jezika u multijezičkoj Vojvodini: Stavovi roditelja o višejezičnosti u osnovnim školama (Development of plurilingual education in Vojvodina: Parents' attitudes to plurilinguality in primary schools).* Novi Sad: Pedagoški zavod Vojvodine.

Puja-Badesku, M. (2009) Dvojezičnost rumunske dece u Vojvodini (Bilinguality of Romanian children in Vojvodina). In Vlahović, P., Bugarski, R. and Vasić, V. (eds.) *Višejezični svet Melanije Mikeš.* Novi Sad: Filozofski fakultet. 145–150.

Schneebaum, A., Rumplmaier, B. and Altzinger, W. (2016) Gender and migration background in intergenerational educational mobility. *Education Economics, 24*(3): 239–260. https://doi.org/10.1080/09645292.2015.1006181

Seid, Y. (2016) Does learning in mother tongue matter? Evidence from a natural experiment in Ethiopia. *Economics of Education Review, 55:* 21–38. https://doi.org/10.1016/j.econedurev.2016.08.006

Šimonji-Černak, R. (2009) *Psihološka analiza i efekti programa obrazovanja slovačke jezičke manjine u Srbiji, Mađarskoj i Rumuniji (A psychological analysis and effects of the Slovak language minority education program in Serbia, Hungary and Romania).* PhD thesis. Novi Sad: Univerzitet u Novom Sadu.

Statistical Office of the Republic of Serbia (2012) *2011 Census of Population, Households and Dwellings in the Republic of Serbia,* Belgrade: Statistical Office of the Republic of Serbia.

Stukalina, Y., Roskosa, A. and Pavlyuk, D. (2018) Investigating students' migration decisions in the frame of career management in higher education institutions of Latvia. *International Journal of Educational Management, 32*(3): 416–430. https://doi.org/10.1108/ijem-09-2016-0200

Székely, G. I. and Horváth, I. (2014) Diversity recognition and minority representation in Central and Southeast Europe: A comparative analysis. *Nationalities Papers, 42*(3): 426–448. https://doi.org/10.1080/00905992.2014.916660

Takács, Z. (2013) *Felsőoktatási határ/helyzetek (Borderline Cases in Higher Education).* Szabadka: Magyarságkutató Tudományos Társaság.

Takács, Z., Tátrai, P. and Erőss, Á. (2013) A Vajdaságból Magyarországra irányuló tanulmányi célú migráció (Educational migration from Vojvodina to Hungary). *Tér és Társadalom, 27*(2): 77–95. https://doi.org/10.17649/tet.27.2.2530

Teferra, D. (2005) Brain circulation: Unparalleled opportunities, underlying challenges, and outmoded presumptions. *Journal of Studies in International Education, 9*(3): 229–250. https://doi.org/10.1177/1028315305277619

Tremblay, K. (2005) Academic mobility and immigration. *Journal of Studies in International Education, 9*(3): 196–228. https://doi.org/10.1177/1028315305277618

Trentini, C. (2014) Ethnic patterns of returns to education in Bulgaria – Do minorities have an incentive to invest in education? *Economics of Transition and Institutional Change, 22*(1): 105–137. https://doi.org/10.1111/ecot.12035

Váradi, M. M. (2013) Migrációs történetek, döntések és narratív identitás. A tanulmányi célú migrációról – másként (Migration stories, decisions, and narrative identity: Educational migration from a different perspective). *Tér és Társadalom, 27*(2): 96–117. https://doi.org/10.17649/tet.27.2.2520

Walker, P. (2010). Guests and hosts – the global market in international higher education: Reflections on the Japan–UK axis in study abroad. *Journal of Research in International Education, 9*(2): 168–184. https://doi.org/10.1177/1475240910374228

Woolley, R., Turpin, T., Marceau, J. and Hill, S. (2008) Mobility matters: Research training and network building in science.*Comparative Technology Transfer and Society, 6*(3): 159–184. https://doi.org/10.1353/ctt.0.0014

Wright, W. E., Boun, S. and García, O. (2015) Introduction: Key concepts and issues in bilingual and multilingual education. In Wright, W. E., Boun, S. and García, O. (eds.) *The Handbook of Bilingual and Multilingual Education.* Chichester: John Wiley & Sons. 1–16.

Zlatanović, S. and Marušiak, J. (2018) 'Return' migration of the Slovak community of Vojvodina: Issue of belonging. *Glasnik Etnografskog instituta SANU, 65*(3): 653–668. https://doi.org/10.2298/GEI1703653Z

BEGOÑA PÉREZ-ERANSUS AND LUCÍA MARTÍNEZ-VIRTO *

Understanding Social Exclusion through Minimum Income Recipients' Living Conditions: Proposals for a New Institutional Social Inclusion Strategy

Intersections.EEJSP
6(2): 154–175.
DOI: 10.17356/ieejsp.v6i2.614
http://intersections.tk.mta.hu

* [begonia.perez@unavarra.es] (Public University of Navarre);
[lucia.martinez@unavarra.es] (Public University of Navarre)

Abstract

There is a long academic and institutional trajectory that understands social exclusion as an accumulation of barriers that hinder social participation. However, stereotypes about misuse and dependency on social benefits continue to be widespread in society. Fighting poverty is the first objective of sustainable development and the UN's 2030 Agenda for Sustainable Development. Commitment is needed from institutions to disseminate real information about people living in exclusion. This study of the living conditions of Minimum Income recipients in Navarre (Spain) shows that households that stay longer in the scheme encounter serious obstacles accessing employment, including unrecognized physical and mental illnesses, are required to care for dependents, or have weak job skills. The related study was conducted through a database analysis of 14,000 benefit recipients and in-depth interviews with 20 recipients.[1] The results show that inclusion through work continues to play a central role in the fight against social exclusion. However, this remains a difficult goal to achieve for many recipients, and employment does not always guarantee social inclusion due to harsh conditions and low salaries. This article recognizes the inclusive potential of economic benefits, since they prevent the deterioration of living conditions and favor social participation. Finally, it suggests a new institutional strategy based on two activities: designing inclusion-based activities around the real needs of poor people, and promoting the commitment of all actors and agents in society in the fight against poverty.

Keywords: *minimum income benefits, social exclusion, inclusion policy, UN Sustainable Development Goals, poverty, institutional strategy.*

[1] This analysis of Navarre (SPAIN) was carried out within the framework of two research projects in which the author is a Principal Investigator: INCLUSIVE, Inclusion Policies in Spain. (CSO2014-51901-P) funded by MINECO, and the European ERSISI project: Enhancing the Right to Social Inclusion through Service Integration (VS / 2016/0209), funded by the European Commission.

1. Introduction

The integration of European citizens is based on participation in three spheres: economic, political, and social. The majority of the population manages, through employment, to obtain a salary that allows them to fulfil their needs while paying for assets and services. In addition, European welfare states have favored taking a collective strategy against risks, such as ageing, illness, or disability, with systems of protection for retirement, health, and social services (Mestrum, 2014). We participate in decision making with our votes, through union membership, and by belonging to the associations that organize public life. Finally, but maybe most significantly, we benefit from a framework of family and social networks in which we find protection, care, and emotional support. The breakdown or weakening of any of these three links – work-related, political, or social – is often compensated for by the effect of the others (Laparra et al., 2007). In contrast, situations of exclusion are characterized by double or triple breakdowns such as in employment and consumption on the one hand, social protection systems on the other, and the most serious kind: of the bonds of social and family protection. Currently, situations of social exclusion persist in many European countries and their remediation is a shared objective according to the 2030 horizon (Sachs et al., 2019).

In this work, the objective is to illustrate, with scientific rigor, the situation of those people with the most difficulties, and to defend the importance of designing policies aimed at remedying these situations. One of the traditional criticisms of studies about exclusion is that, by focusing on households that are less well integrated, this may divert attention from deeper structural phenomena such as socio-economic inequalities (Atkinson and Davoudi, 2000). Providing evidence about situations in which citizens encounter greater difficulty allows urgent responses to be articulated that help avoid the related discomfort and deterioration (Ayala, 2014). However, the study of poverty and exclusion is not incompatible with the study of inequalities and the defense of inclusive social policies that go beyond anti-poverty programs (Silver, 2012).

This is why important progress towards social inclusion would consist of fostering collective recognition of the existence of that part of the population that accumulates difficulties in different areas, and is in need of help. This implies overcoming prejudices regarding poverty and exclusion that involve claims about the passive behavior and dependency on social benefits of recipients (Wacquant, 2010). An analysis of the living conditions of the population that receives these benefits can eradicate such erroneous concepts by showing that what really characterizes the majority of these situations is a real need for support, and the accumulation of barriers which make social participation difficult (Foessa, 2019).

This article aims to contribute to this objective by analyzing the database of minimum income scheme recipients in Navarre, Spain. It is designed to highlight the characteristics of the households that access this benefit in order to understand, from their socio-demographic profile, the reasons they require financial support, and the factors that shape their trajectories of social exclusion. Equally, it intends to describe the different living conditions of the beneficiaries

and identify the real scope of chronic dependence on economic benefits. In addition to this, and in line with the objective of the qualitative study of minimum income recipient households, it aims to identify the factors that exclude this population and, at the same time, to provide evidence of the integration potential of economic benefits.

Inclusion policies in Spain are highly decentralized, thus much of their effectiveness depends on the local and regional factors in relation to which they were developed (Silver, 2015). This makes the present in-depth case study relevant and necessary. Navarre is a northern Spanish region with a long history of fighting poverty and social exclusion. Navarre's minimum income benefit was a pioneering initiative for Spain. Since the 1990s, this provision has progressed in terms of legal framework, coverage, and funding. In 2016, the recognition of the 'double right' weakened the requirements for receiving the benefit and implemented incentives making it compatible with employment. Navarre's minimum income benefit is currently one of the most advanced resources in Spain in term of the fight against poverty, together with other European models (Aguilar and Arriba, 2020). Its impact represents an interesting case for other Spanish regions and European countries, and can contribute to knowledge dissemination between territories.

The first part of this work features a conceptual approximation of social exclusion as a multidimensional phenomenon, while the second part presents the methodological process and the results of the analysis of minimum income recipients in Navarre using a quantitative study, on the one hand, and an in-depth qualitative analysis of a selection of case studies on the other. In the last section, conclusions are provided along with some considerations about a new institutional strategy that acknowledges the need to recognize the inclusive potential of financial benefits and other channels of social inclusion beyond employment, and the commitment of all actors and agents in society in the fight against poverty. The UN's 2030 Agenda for Sustainable Development defines the goals for governments to reach, and studies such as this one can provide the evidence that is necessary to guide social policies (Le Blanc, 2015).

2. Understanding social exclusion from a multidimensional perspective

There is broad consensus that social exclusion should be perceived as a phenomenon that is more extensive than economic poverty, and which, therefore, tends to be accompanied by difficulties in other dimensions (Förster et al., 2003). However, this theoretical consensus does not always translate into a shared definition of the dimensions of difficulty that should be considered, and there is no commonly acknowledged means of measuring the phenomenon (Atkinson et al., 2010; OECD, 2017). Thus, there are multiple ways of perceiving and measuring exclusion. One of the most commonly used in Europe is the AROPE rate, which includes the dimensions of economic poverty, severe material deprivation, and low employment intensity. However, on a national scale there are many other approaches which are much more complex and which include other dimensions. In

this project, we have adopted a conception of social exclusion based on the three dimensions that are claimed to integrate European citizens (Marshall, 1985): economic participation, political participation, and social participation. We can outline different situations of difficulty in each of these three dimensions (see Table 1):

Table 1: Dimensions of exclusion

Economic participation	Economic poverty Deprivation Lack of quality employment (long-term unemployment, working poverty, households that accumulate unemployment, households with low work intensity)
Political participation	Badly addressed health problems (failure to use health services, lack of protection against dependency, inability to access medicines or treatments for economic reasons) Inadequate housing (impoverishment due to living costs, overcrowding, accessibility, degraded environment) Limited use of the education system (illiteracy, early school leaving)
Social participation	Social isolation Lack of social support Bad family relationships (conflict, abuse)

Source: Laparra and Pérez-Eransus (2008: 208)

Therefore, the accumulation of difficulties in different dimensions characterizes social exclusion as a more serious phenomenon than other more numerous individual sources of difficulty, such as financial poverty. In this sense, exclusion comprises different situations that are associated with the intensity of an accumulation of problems, and the weight of different dimensions.

Although exclusion is a multi-dimensional phenomenon, financial poverty is undoubtedly a dimension that is widely present in social exclusion. Households that have prolonged periods of low income suffer from deprivation and an inability to fulfil basic needs, such as those for food, energy, medicine and leisure. Such lack worsens their living conditions and has negative long-term and short-term effects on the physical and mental health of the former (Martinez Virto, 2018).

Unemployment and inactivity are also traditionally linked with social exclusion, especially if they are combined with a lack of income or family protection. In recent times, we have been able to add to this list the reality of people who, in spite of working, still find themselves in poverty (ILO, 2018). The growing polarization of labor markets is generating a large proportion of precarious employment that does not favor social integration. In contrast, the intensity of some exploitative labor situations has negative effects on health and

cohabitation in the home (Muntaner, et al, 2010). Spain has a higher poverty risk than the average of countries in the EU-28. As may be observed from Table 2, the at-risk-of-poverty rate in 2013 had escalated to 20.4 per cent, while the European average was four percentage points lower (16.7 per cent). This index defines 'at-risk-of-poverty' as the proportion of households with an income less than 60 per cent of the median annual income consumption. Slightly increases in both regions can be seen in 2018.

Table 2: At-risk-of-monetary-poverty and AROPE rate in Navarre, Spain, and Europe-28, 2013 and 2018

	Navarre		Spain		EU 28	
	2013	2018	2013	2018	2013	2018
At risk of monetary poverty (national threshold) (per cent)	9,9	8,9	20,4	21,5	16,7	17,1
AROPE	14,5	12,6	27,3	26,1	24,6	21,8

Source: Spanish Institute of Statistics (INE) and Eurostat

In contrast, Navarre has an average level of economic poverty that is below that of Spain and Europe. However, it should be noted that this is partly because the income threshold defined in related surveys is the national threshold, not the regional one. If the regional threshold were applied, the poverty rate in 2013 would rise to 22.3 per cent, according to official statistics from Navarre (ORSN, 2019). In Navarre's case, relative poverty rates decreased between 2013 and 2018. This is partly a consequence of the new active income benefit that since 2016 has reduced poverty rates in the region.

However, in Navarre and Spain, with elevated housing prices, there is a close link between situations of exclusion and housing access. For instance, in 2013 the House Price Index (HPI), calculated quarterly by the Spanish Institute of Statistics (INE) and Eurostat, confirmed the high price of housing in Navarre (102.60), which is more than the Spanish average (95.51) and the Europe-28 average (94.70). Although these differences have declined in recent years, Spain is a country in which housing costs are a significant burden in terms of family budgets.

High rental and sales prices have a direct impact on the situation of exclusion, and become manifest in several ways: the impoverishment of families, the need to share homes, not being able to adapt to conditions at home, and homelessness (Shinn, 2010). Spain has a specific and perverse combination of high housing prices combined with a high rate of precarious employment and unemployment. In 2013, Spain's youth unemployment rate (25–29 years old) was double the average European (33.3 per cent vs. 14.6 per cent, respectively), according to data from LFS (Eurostat). While in 2018 the rate declined to 20.4 per cent, it continues to be double the level of the Europe-28 average (9.1 per cent).

Likewise, job insecurity in Spain is reflected in the rate of workers in poverty, which reached 12.9 per cent in 2018, three percentage points higher than the European average (9.4 per cent), according to SILC (Eurostat) data. This dual phenomenon characterizes a substantial part of the exclusion processes in this country which unfairly affect young households and the non-native population (Foessa, 2019).

The link between health and exclusion is also close, and has been widely supported with evidence. Health issues are both a cause and a consequence of exclusion. The presence of disability, dependency, illnesses and mental disorders makes occupational and social inclusion difficult, not only for those who suffer, but also for their carers. Equally, deprivation (a lack of food, heating, medicine, orthopedic devices and other treatments) that originates from a lack of income and from long-term unemployment, or from job-related exploitation, has a negative impact on people's physical and mental health (Pettersson, 2012). For this reason, the presence of health problems is a common characteristic of households in which there is exclusion, and this constitutes a barrier to occupational and social inclusion (Stuckler et al., 2011).

A higher level of educational attainment and substantial access to higher education in Europe and in Spain were claimed, in the period following the crisis in 2008, to protect against exclusion. The greater the level of education, the lower the rate of social exclusion (Flores, 2016). Young, unqualified people are particularly affected by long-term unemployment in Spain. This situation suggests a clear lesson: better education helps to prevent social exclusion; however, the most excluded families do not manage to attain a level of education that would negate their difficulties. Greater investment into reducing the effect of social class on the utilization of the education system is required (Fernández y Calero, 2014).

The significance of the breakdown of social links justifies studies of social exclusion. Household-level protection, in the form of support from other members of the family, can effectively compensate for many difficulties. Such support can be financial, emotional, or in the form of care (Mullin and Arce, 2008). This is why studies of exclusion show that certain forms of cohabitation are especially frequent in cases of social exclusion: people living alone and single-parent households have a heightened probability of becoming immersed in exclusion processes. In these households, a lack of support negatively reinforces other difficulties, such as unemployment, housing-related expenses, or problems with health and dependency (Foessa, 2014).

As we have described, the causes of people's suffering from social exclusion are linked to processes that occur in different areas. The fact that exclusion is a situation characterized by an accumulation of barriers which originate in different social spheres necessarily implies that inclusion policies need to be designed with this in mind.

At the structural level (see Table 3), the transformation processes of the labor market and migratory dynamics foster situations of vulnerability for many people. At an institutional level, the configuration of social protection systems in various countries favors the social protection of some social risks, such as ageing,

illness, and precarious unemployment (Fernández, 2015). However, supportive elements such as affordable housing, free access to medicine and health treatment, and post-compulsory education have failed to be included in social protection. In some countries, such as Spain, the limits to the protection of contributions related to unemployment and other social policies represent a clear lack of institutional protection for people who join the labor market only later: especially young people and foreigners. Finally, at the individual/family level, many other factors also determine the processes of social exclusion: the configuration of the household itself, breakups, illnesses, conflict, capacities, and attitudes (Oxfam, 2019).

Table 3: Analytical levels of inclusion policies

Level	Structural	Institutional	Individual/Family
Definition	Capability of a society to encourage the social participation of its members. Level of social cohesion	Activities aimed at improving access to protection systems for certain people	Schemes specifically designed to encourage the social participation of certain people or families
Type of policies	Influence of the state on the generation of job opportunities, access to benefits. Position in the international division of labor. Management of migratory flows	Social inclusion policies: active policies, economic protection, housing, educational inclusion schemes, access to health resources	Personalized schemes for comprehensive care

Source: Author's elaboration, from Laparra et al. (2007)

Thus, effective inclusion policies should promote joined up action across the three levels, especially productive frameworks that promote quality employment or the regulation of migratory flows. At an institutional level, social policies should make access to health, education, housing, and social services more inclusive. Moreover, at a micro level, responses should be provided that are adapted to the specific circumstances of households that find themselves in situations of exclusion.

3. Methodology

In the study described herein, two types of analysis were carried out, one of a qualitative nature using an official database of 14,000 households that received the Guaranteed Income (GI) (2016), which was designed to collect information about the socio-demographic profile of the beneficiaries and the amount of time that they had spent in the scheme. Even though this database collects information on households without any income, is the closest regional approach to this phenomenon and represents a large enough research sample. The multidimensional and dynamic nature of exclusion makes for arduous quantitative measurement. With the exception of some indicators such as AROPE, or the Foessa

Reports in Spain, it is challenging to obtain administrative records that measure this phenomenon.

This approach, accompanied by other qualitative tools, allows for a deeper understanding of social exclusion and the living conditions of those affected by it. Second, a qualitative study that included case studies of beneficiaries was carried out.

The interviews were carried out in 2014, and all cases had been recipients of the benefit for several years. Life stories were recorded and analyzed based on the following analytical categories: household typology, age and place of birth, health, employment, survivor strategies, deprivations, and social relationships.

This analysis was designed to examine the living conditions associated with these homes, and reveal the impact of the benefit on the situation of the inhabitants. The total sample was made up of 20 life stories of individuals at risk of, or currently suffering from, situations of social exclusion. The selection of the sample was carried out based on criterion such as sex, age, origin, and educational level. In the article, eight types of homes are selected and analyzed from the overall testimonies. This selection responds to the fact that the sample reached information saturation in relation to the objectives of this analysis at this point (Kvale, 2011).

Through the selection and in-depth analysis of these eight cases, the different exclusion factors that mark their exclusion trajectories were identified. The empirical material was transcribed and coded using the following categories of analysis: economic participation, work, childcare, housing, social relations, health, and education. The combination of quantitative and qualitative methodology demonstrated significant potential for poverty and exclusion research. While quantitative information permits the measurement of the dynamics of poverty and exclusion, qualitative information helps the researcher to understand the factors that shape exclusion paths (Callejo, 1998). Moreover, this approach generates contrasting results through the triangulation of data and testimonies (Flick, 2017) and makes those who are excluded the protagonists of their own stories in relation to understanding this phenomenon (Brannen, 2017).

4. Understanding social exclusion from the living conditions of minimum income recipients

The aim here is to contrast the multidimensional conception of exclusion and its accumulative character using a study of households that are minimum income recipients in Navarre. The *Renta Garantizada* (Guaranteed Income: GI) is a benefit aimed at people who find themselves below the poverty line in this area of Spain. In Spain, as mentioned before, the national unemployment protection system is contribution based, and although there are some care benefits for certain groups, there is no state benefit aimed at people who suffer from poverty. This responsibility has been left in the hands of the regions that must attempt to, in a very unequal manner, manage the situation of poverty in Spain. In fact, paradoxically, some of the regions with lower poverty and exclusion rates have the

most generous minimum income schemes. This is the case in the Basque Country and Navarre. Specifically, in Navarre, the income threshold for accessing the benefit is 644 euros per individual per month.

The number of people receiving this benefit has greatly increased over the last few years. From 2,473 households in 2007, it had increased to 14,000 households in 2016. Since 2017, according to official data from Navarre, the distribution of the Guaranteed Income benefit progressively increased in scope, being awarded to 15,940 beneficiaries in 2017, 16,299 in 2018, and 15,941 in 2019. This can be explained by the rise in poverty generated by the crisis that began in 2008, but also to a reform in the benefit that, in response to the delicate situation, increased its coverage. Finally, it is worth highlighting that the demand for this type of regional benefit has increased in recent years due to the gradual depletion of contribution-based state benefits.

Navarre has had a minimum income benefit since 1999 and an exclusion strategy since 1998, both regulatory milestones and pioneering initiatives in Spain. The first benefit remained in effect until 2008 when it was modified to promote more integral coverage. Nevertheless, as a direct consequence of the economic crisis, it was reformed again in 2012 to incorporate strict restrictions on access. This led to a strong response from the affected social institutions, social fabric, and those directly affected. Due to this pressure, five partial reforms were undertaken, making the requirements more flexible, extending protection to households with minors, and trying to make the renewal process of the benefits more efficient. Finally, in 2016, Regional Law 15/2016 approved the new Guaranteed Income (GI) and revoked legal support for the 2012 benefit.[2] The new benefit was approved in November 2016, so the data analyzed in this article refer to the previous regulations. Even so, the increase in social need and partial regulatory changes show a progressive increase in the number of beneficiaries. These include the protection of households with children, the extension of eligibility for benefits for up to 36 months, and extended provisions for people under 25 and over 65 years old with family responsibilities. These modifications were identified both in the increase in number of beneficiaries and the life stories of the households we analyzed.

Opinions about this benefit are somewhat variable, but what is for sure is that, since its origins in the 1990s, it has been subject to constant debate regarding its efficiency, its relationship to dependent behavior, and its deterrent effect upon beneficiaries as regards re-joining the labor market. Such questions have become more prescient with the rise in the number of recipients and especially since the economic recovery and employment growth since 2015. The query put forward by certain political and social actors is why has the number of benefit recipients not decreased along with the falling rate of unemployment?

[2] Each of these modifications took a different name: 'Basic Income' until 2012, 'Social Inclusion Income' until 2016, and currently, 'Guaranteed Income.' In order to simplify the terminology, the current name Guaranteed Income is taken as the general denomination, although the important differences among the former schemes will be identified.

The fact that many people accumulate social problems as well as those related to health and a low level of qualifications, as well as other types of issues, may partly explain why new jobs have not been given to the former but to the unemployed with the best qualifications and the personal situations. Several studies alert us to the fact that the labor market discriminates on the basis of many factors in addition to qualification and professional experience: for example, age, gender, ethnicity, disability, and availability (OIT, 2018).

4.1 Characteristics of households receiving benefits

The analysis of the survey regarding recipients of Guaranteed Income benefit in Navarre has shown the heterogeneity of recipient families. In view of claims about passive behavior and chronic dependency that traditionally accompany these benefits, this study identifies a typology of five common characteristics that helps us to understand the situation of recipient households: households without family protection, households that include many minors, households with working beneficiaries, the low employability of 'breadwinners,' and the low level of chronic dependency

1. Households without family protection

Analysis of the profile of recipients highlights the specific presence of households with limited protective capacity. Some 70 per cent of households that were receiving the Guaranteed Income benefit in 2016 were single people who were relying on their own income: either because they were living by themselves (20.7 per cent), because they were separated from their children (25.3 per cent), or because they were sharing a house with other people they were not related to (24.1 per cent). Only 28.8 per cent of households that were receiving the GI benefit were made up of couples (with or without children). This data confirms the fact that unemployment and insecurity are often compensated for in households, and that it is largely people who depend on their own income that are more likely to fall into poverty and request help.

2. High number of minors

One-third of people in the scheme were under the age of 18 (10,507 out of 29,029). The high presence of minors, both in single-parent households and families with children, shows the clear generational stamp of the effects of the economic crisis and the transformations that have taken place in the job market. Equally, it alerts us to the fact that the difficulties experienced by these households have a negative impact on the nurturing and development of minors that reproduces inequalities. The presence of minors confirms the fact that GI benefits are required as a preventative mechanism against the greater deterioration of the living conditions of children caused by poverty and deprivation.

3. Growing presence of beneficiaries that work

From 2014–2016, 38.6 per cent of people receiving the GI benefit had some kind of work contract (7,965 people). In these cases, the limited duration and remuneration of employment meant that these people were also claiming the economic benefit. The majority of these recipients had temporary contracts in the

service sector. We believe that the growing presence of 'poor people who work' within these schemes should help to overcome stereotypes about the passive behavior and dependency associated with poverty and exclusion (Carter and Witworth, 2017). This situation should also lead to us to reconsider the social and occupational intervention strategies that, until now, have been aimed at facilitating 'reintegration to the labor market.' First, the inclusion process could be improved by a strategy of 'making work pay' by means of financial supplements. The employment incentives included in the new GI legislation from 2016 clearly adhere to this principle, and their streamlined and flexible management will be key to encouraging beneficiaries to accept job offers in spite of their instability.

In second place, it is necessary to rethink employment activation strategies in two ways: by permitting those (precarious) jobs that are available to be accessed, and to adapt them in terms of schedules, requirements, and payment to the reality of poor workers.

4. Low employability of 'breadwinners'

Beneficiaries of the Guaranteed Income benefit typically lack higher-education-related and professional qualifications (see Table 4). Almost 90 per cent of recipients of legal age do not have sufficient training to allow them to compete in the search for employment in a context that is exceedingly more competitive, and thereby escape precarious employment. Again, we become aware of the need for measures that would allow unstable employment to be complemented, and for qualification strategies that are especially well adapted to the circumstances of the excluded population.

Table 4: Educational level of Guaranteed Income beneficiaries

	per cent
Illiterate	0.2
Incomplete primary education	7.4
Primary education	4.1
First stage of secondary education	76.1
Second stage of secondary education (general)	4.5
Second stage of secondary education (professional)	3.7
Higher education	0.9

Source: GI database 2016

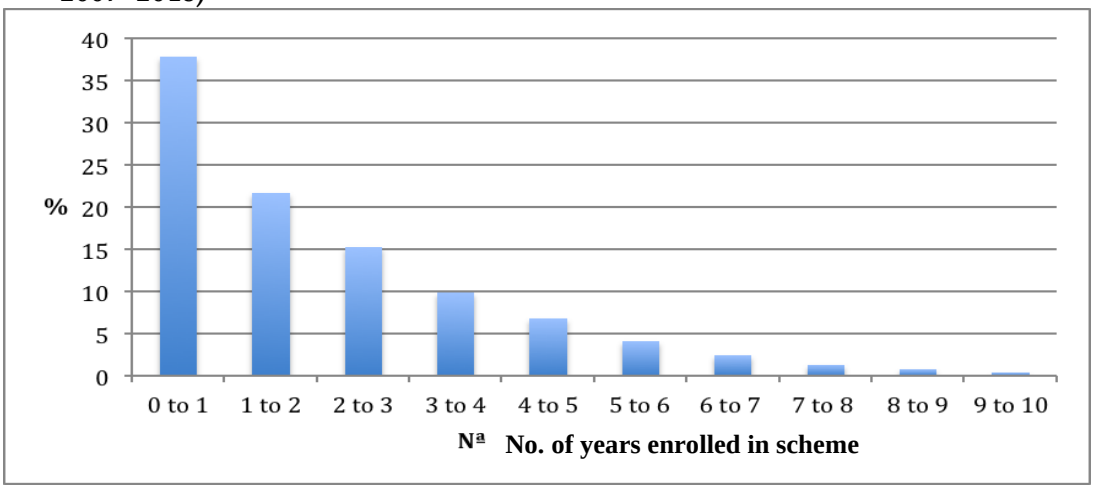
Considering age, we see that 75 per cent of recipients of the GI benefit that are not working are above the age of 45. Within this group, it is of particular note that 36 per cent of people above the age of 55 years old are unemployed and their labor insertion would be especially complex. In this case, tailored approaches should be applied that respond to the characteristics of each case, given that mental health problems (alcoholism, depression, and other afflictions) often seem to be present. In some of these cases, employment and protected or occupational activity may be a way of improving quality of life. In others, promoting other methods of social

participation may be more appropriate, such as social networks, leisure activities, and others.

5. Low probability of chronic dependency

In terms of the permanence of claiming benefits, it is obvious that there are several types of relationships with the scheme, but that dependency or chronic use is clearly not the predominant case.

Figure 1: Years spent receiving Guaranteed Income benefit (beneficiaries 2007–2016)



Source: GI database (2007–2016).

Some 37 per cent of people who accessed the scheme between 2007 and 2016 only spent one year receiving the benefit and did not do so again during that period. Another 36 per cent received the benefit for a periods of two or three years, and 27 per cent spent over three years in the scheme. Among the sample, the percentage of families that remained in the scheme for over six years did not reach 5 per cent.

Therefore, the analysis of this survey highlights the characteristics of recipient households. Specifically, it identifies how factors such as the level of education and family networks affect the receipt of benefits. Equally, the protective capacity of this benefit in households with minors is verified. However, the increasing presence of precarious employment in these families may be noted, along with the low incidence of chronic dependency. Again, these results back up the idea that the population turns to these types of schemes in times of need, but if there are occupational opportunities, or their situations improve, they leave them.

Despite the significance of this data, in order to fully understand social exclusion we must draw upon qualitative methodology. The biographical method is a good approach for increasing understanding of the implications of poverty and exclusion in affected households that receive benefits (Kornblit, 2007). Specifically, in-depth analysis of those households that spend the most time in the scheme can help us to understand the causes of said permanence, the factors that shape exclusion, and their living conditions.

4.2 The multidimensionality of exclusion in households receiving the GI benefit

Shown here are the results of eight case studies of families receiving the Guaranteed Income benefit, together with an in-depth analysis of the living conditions as identified through the quantitative analysis. This selection includes benefit recipients who we studied for a period of three years or more. These eight cases represent diverse examples and have been examined in relation to four analytical categories: household composition (single-parent households/single persons/families with minors), age (older people/young people), origin (foreigners/nationals), and occupation (employed/unemployed people).

This qualitative analysis shows the living conditions of these families in line with the set of social participation dimensions (economic, political, and social) and the factors that motivate their social exclusion. Thanks to the above approach, the role that services play in stopping and containing situations of need can be verified. Table 5 contains a summary of the cases that reflects the multidimensionality of the situations of the households and helps explain the difficulty they have escaping the protection of the scheme.

Table 5: Characteristics of selected GI benefit recipients

	Type	**Age and nationality**	**Health**	**Employment**	**Strategies**	**Deprivations**	**Social relationships**
1	A single mother with three-year old girl	35 years old Bolivia	Work involved a lot of travel and instability. Suffering from psychological and physical exhaustion	Combines work with GI Has worked in the domestic and care sector Low-level qualifications	Shares her home with another family to cover expenses.	Leisure, food, and housing	No family and social networks, conflict related to cohabitation
2	Couple	59-year-old man and 50-year-old woman Spanish	The woman has arthritis (having worked as a cleaner). She is stressed and overweight due to her diet	Unemployed for three years, she has exhausted her contribution-based benefits Low-level qualifications	Asking friends for money	Leisure, food, mortgage-related debts and housing expenses	Conflict related to relationships and cohabitation
3	Couple with children (8, 6 and 4 years old)	46-year-old man, and 44-year-old woman Spanish	The man has been diagnosed with diabetes which makes movement and vision difficult, kidney problems	Delivery job with no associated social security Unqualified Raising the children	Decrease housing, food, and leisure expenses	Heating house, food, no orthopedic nor opticians for specific treatments which could alleviate illness	Conflict related to relationships and cohabitation with children

	Type	Age and nationality	Health	Employment	Strategies	Deprivations	Social relationships
4	Single man	63 years old, Spanish	Receiving treatment for alcohol addiction Health weakened as a result of alcohol	Previous skilled occupation Has now exhausted contribution-based benefits	Decrease housing, food, and leisure expenses	Autonomy, and leisure	Social isolation Divorced Re-building relationship with daughter and sisters
5	Single man	35 years old Spanish	Being treated for mental health, low self-esteem, depression	Unemployed for 4 years Basic education Some irregular work-related activity	Previously an apartment owner, had to sell but he's still paying off the debt Currently living in a rented property	Debt problems Leisure, food. and housing	Has no family support, A bad relationship with his sisters Separated
6	Couple, and three children, (5, 4 and 2 years old)	A 41-year-old man and a 36-year-old woman Malian	No relevant health problems	Unemployed for 3 years Sporadic work in agriculture and construction She is raising the children	To increase the motivation to find a job Decrease housing, food, and leisure expenses Lives in shared house	No recognized qualification Woman Doesn't speak Spanish language well	Conflict related to relationships and cohabitation in a reduced space
7	Single man	20 years old Ecuadorian	No relevant health problems	Unemployed Low level of qualifications	Lived in a foster center until he turned 18 years old Currently living in one room	Leisure, food, and educational training	Relationship problems with his mother due to his migration Has accumulated charges for violent behavior

	Type	Age and nationality	Health	Employment	Strategies	Deprivations	Social relationships
8	Single, woman	50-year-old Spanish	Due to intense caring responsibilities, she ended up becoming ill too	Left her job to look after her parents Works as cleaner in a theatre, no contract Unqualified	Decrease housing, food, and leisure expenses	Isolation	No social networks

Source: Prepared by the author based on respondent life stories

The first case is of a 35-year old migrant mother from Bolivia, a single parent working in the domestic sector, and her three-year-old daughter. In this case, access to the scheme is necessary to complement a low and unstable income from work. Cohabitation with another family and deprivation increase the risk of social exclusion for the minor. Being solely responsible for her daughter, the mother's potential to increase her workload or opt for other types of employment is limited. The economic benefit plays a clear role in preventing further deterioration. Single-parent households experience problems resulting from unemployment and high housing prices. These are usually covered by the income of one single person using different coping strategies such as shared housing and taking on care work. This situation also reflects the severity of living conditions in the domestic employment sector associated with limited protection.

The second case is of a childless couple: a 59-year-old man and his wife, who is 50 years old. This case clearly reflects the negative interactions between the different dimensions of social exclusion: a lack of income, debt, and worry are having negative effects on the physical and mental health of the couple and their relationship. Due to age, lack of qualifications and experience, labor participation seems improbable. In this case, the benefit also plays a moderating role, preventing further deterioration of the situation.

The third case focuses on a couple with children: a 46-year-old man, a 44-year-old woman and three children of eight, six and four years old. In this case, a spiral of negative reinforcement between unemployment and health problems are having a direct impact on the living conditions and relationships of the household members. Both members of the couple, who are relatively young, have limited training, experience, or availability for employment. In this case, the benefit also prevents further deterioration of the situation.

In the fourth and fifth case, we find two single men. The first is a 63-year-old, and alcohol is behind a series of breakdowns related to his job, relationship, and family. His advanced age and alcohol consumption make his employability unfeasible. In this case, the benefit also prevents further deterioration of the situation and has enabled a link with services who can work on obtaining access to treatment for his addiction and monitoring of the case.

Case 5 involves a 35-year-old man. This case shows an intense decline into social exclusion leading from unemployment. The effects of a lack of income, with

the presence of a substantial housing loan, have had a hard and sustained impact on the mental situation of this person who, in addition to this problem, has no other social networks. The benefit has had an effect on preventing the deterioration of the situation.

In Case 6, unemployment and deprivation have had a negative impact on the cohabitation situation of the family, making the couple's relationship and the rearing of minors difficult. In this household, made up of a Malian migrant couple (a 41-year-old man, a 36-year-old woman, and three children aged five, four, and two years old), deprivation involves a lack of food and weak protection of minors. The benefit prevents further deterioration.

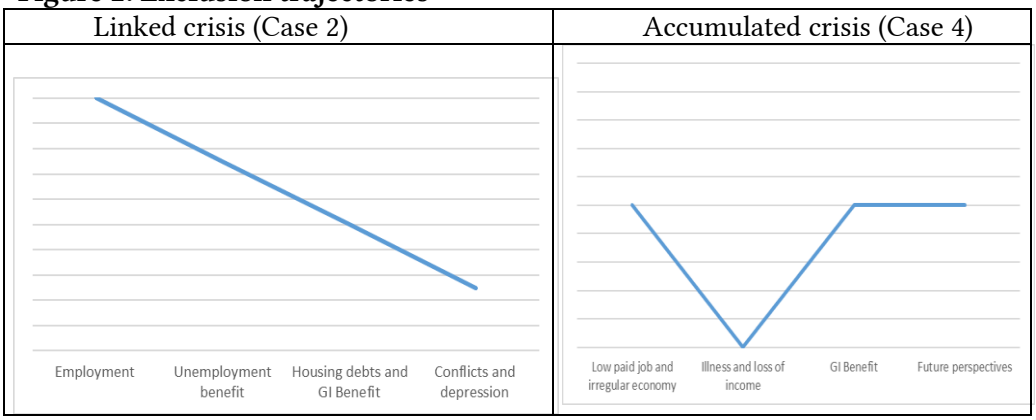
Case 7 represents the very specific reality of minors who transition through protection and reform institutions. When they turn 18, they are ejected to begin an independent life in which they are clearly vulnerable to social exclusion. In this case, the minor is 20 years old, has broken all ties with his mother, and has no other type of family protection. His mother emigrated from Ecuador when he was four years old and he was raised by his grandmother. He was reunited with his mother in Spain at the age of 13. He has little opportunity for participation in quality labor due to his lack of qualifications, and also requires personal follow-up and support. In this case, the benefit acts in a preventive way.

The last case involves a 50-year-old woman and is representative of an extreme case of an increasingly frequent reality: women who are weighed down with care tasks. In this case, care is an obstacle in terms of her engagement in paid labor, but it has also had serious effects on her physical and mental health. The benefit has a preventative effect.

The eight cases represent a diversity of situations of social exclusion that share the factor of an accumulation of problems and negative reinforcement among these problems in different dimensions. In most of the cases, the specific impact of health problems may be observed, which represent both the cause and the consequence of the relationship with employment. The absence of family networks and the impact of problems on cohabitation-based relationships also seem to be a constant issue for many families. For many of them, normalized labor participation is not easy, or at least not when it comes to obtaining quality employment, thus the economic benefit they receive halts any further deterioration in their situations that are characterized by deprivation in terms of basic factors such as food, health treatment, and housing expenses.

All of the above-described situations have highlighted a variety of exclusion and inclusion processes. People's health (whether or not care-related support is needed), deprivation in terms of housing, food, or leisure, as well as the existence of family networks and social support affect exclusion situations. Two types of trajectories stand out. On the one hand, a lack of income has worsened the highly precarious life conditions and situations of many and resulted in an accumulation of crises. On the other hand, for some, illness, addiction, or unsuccessful unemployment have put them on a rapid downward path of progressive exclusion. The following graph shows how these trajectories can be verified. Case 2 and Case 4 are included as examples.

Figure 2: Exclusion trajectories



Source: Prepared by the author based on life stories

The first graph traces the trajectory of a family with a late history of unemployment. During the first stage of unemployment, the family obtained a contribution-based benefit that mitigated income loss. However, over time, the household lost purchasing power and accumulated debts related to making payments on a house and ultimately requested help from family and friends. The Guaranteed Income benefit has been an important source of support for the household due to their few employment opportunities and loss of self-esteem derived from their exclusion. On the other hand, Case 4 is a household marked by a lifetime of precariousness. Always linked to irregular activities or low-wage jobs, the respondent's situation worsened after an illness. Guaranteed income has been key to alleviating the total loss of income, allowing the couple to survive this continuous and constant situation of exclusion. Therefore, in both types of situations, guaranteed income benefit has been a buffer against poverty and a brake on exclusion.

5. Conclusions: Proposals for a new institutional social inclusion strategy

The empirical analysis presented above is proof of the multidimensionality of exclusion, which affects, in a combined manner, different areas of the well-being of the people who are affected. This point confirms the importance of designing an inclusion strategy that unites different actors and includes collaboration for raising social awareness about these socio-economic phenomena, and taking joint responsibility for the treatment of exclusion.

First, from public administrations commitment is required to generate and disseminate real information about the characteristics of people served by different social benefits. Here, we have verified that households that access the Guaranteed Income benefit in Navarre, and spend a longer period receiving it, are the more vulnerable households that accumulate the most problems.

On the one hand, there is a greater proportion of single people and single-parent households within this scheme, which indicates that the presence of two adults in a home may make difficult situations more compensable. On the other hand, in recent years the presence of people who, despite being employed, find themselves below the poverty line has increased. There is also a growing presence of unemployed people above the age of 45, or even 55, who are unqualified and have special difficulty in terms of accessing employment. Finally, it has been verified, through the in-depth study of benefit recipients, that an accumulation of problems can be an obstacle to returning to employment, and therefore make financial protection and other types of support necessary for longer.

The commitment of political parties, media, and society is essential in this effort to overcome the prejudice that links chronic states of dependency with the award of such benefits. It has been shown that, in the majority of cases, the use of these benefits is specifically associated with situations of difficulty, and that a substantial proportion of recipients are in work, but this does not allow them to overcome their situation of poverty.

Second, it is well worth making an institutional effort to defend the effectiveness of social policies in general, and the benefits programs and other schemes that target the excluded population, in particular.

It is true that access to employment is still of strong integrative value, as this implies access to income, social rights, and self-esteem. In fact, this means of participation is considered by large sectors of society to be the best and only means of social participation for excluded people. This means that promoting inclusion via employment has played a central role in interventions with excluded people. However, as we know, in the current context it is difficult to guarantee occupational opportunities for all unemployed people, even those with the most qualifications. In addition, access to employment does not always guarantee social inclusion due to the limited duration and low salary of many jobs.

For this reason, a collective effort must be made by institutions, experts, and the media to communicate the current limits of labor inclusion to citizens, and to highlight the value of other forms of social inclusion.

Economic benefits, such as the guaranteed income benefit, special assistance grants, and others, are of strong integrative value. They have great preventative potential in relation to avoiding social deterioration processes: they prevent indebtedness and deprivation involving basic goods; and they encourage the independence of families, and therefore prevent the pernicious effects of saving strategies based on being forced to share housing with other family nuclei. In recent years, we have verified that these saving strategies are having extremely negative effects on family cohabitation and on the education of minors. However, economic benefits encourage the social participation of families through consumption and leisure. Subsequently, the breakdown of the labor market does not inevitably imply more social breakdowns that affect the isolation of people and their social stigmatization.

Analysis of these schemes shows that they clearly improve the living conditions of people in situations of poverty and exclusion, and that leaving these

schemes depends on the availability of occupational opportunities or the presence in the household of illness, disability, or problems that make accessing employment difficult.

On the other hand, the characteristics of households in situations of exclusion show that their position could be improved by support in other areas. We should thus disseminate the importance of schemes that are designed to improve health, promote education and training, or housing access and maintenance. Finally, given the importance of relational factors in exclusion, interventions aimed at promoting the social participation of people through their incorporation in associations, leisure activities, sports and culture, or simply through personal meetings with volunteers or professionals, are also considered to be highly effective. Once again, it is necessary to raise awareness of the importance of these relational developments in the fight against exclusion, and to increase the value placed on them by making them visible, and by dedicating professional space and time to them.

Many social organizations and public services recognize the value of these relational spaces for improving the self-esteem and social status of excluded people and work to promote them. However, this effort is not visible at an institutional and public level, being displaced by the primary importance awarded to performance efficiency indicators based on labor insertion and improvements in employability.

The complexity of exclusion means that the efficiency of inclusion policies depends on the cooperation of different administrations. Different social policies are managed by branches of the Government of Navarre (education, health, housing, employment, and social rights) and at the level of municipalities (social services, culture, sports, security, and citizen participation).

Economic agents, companies and unions also have a pivotal role to play in enhancing social cohesion, as the creation of employment and the maintenance of the quality of said employment are key to the prevention of social exclusion. There is also evidence of the importance of the work of these actors in the development of specific occupational opportunities for people suffering from exclusion (employment associated with support, paid work experiences, and sheltered employment). It is therefore necessary to continue to involve the business sector and trade unions so that these specific social inclusion schemes can become stronger.

Thus, improving the social cohesion of regions is the responsibility of the population as a whole. The involvement of all social groups is necessary in the fight against exclusion: professionals, the media, political parties, companies, unions, associations, universities, and non-profit associations. For this purpose, knowledge about situations of exclusion and their causes must be improved, and attitudes of solidarity among all citizens should be encouraged. The aim is to overcome the prejudice surrounding the excluded population and minority groups, and to generate values of solidarity, coexistence, and social commitment.

References

Aguilar-Hendrickson, M. and Arriba González de Durana, A. (2020) Out of the wilderness? The coming back of the debate on minimum income in Spain and the Great Recession. *Social Policy & Administration, 54*(4): 556–573. https://doi.org/10.1111/spol.12605

Atkinson, A. and Marlier, E. (2010) *Analysing and Measuring Social Inclusion in a Global Context*. New York: United Nations.

Atkinson, R. and Davoudi, S. (2000) The concept of social exclusion in the European Union: Context, development and possibilities. *Journal of Common Market Studies, 38*(3): 427–448.

Ayala, L. (2014) *Desigualdad y pobreza en España en el largo plazo. La continuidad de un modelo. (Inequality and Poverty in Spain in the Long Term: The Continuity of a Model).* Madrid: Fundación FOESSA.

Brannen, J. (ed.) (2017) *Mixing Methods: Qualitative and Quantitative Research.* London: Routledge.

Callejo, J. (1998) Sobre el uso conjunto de prácticas cualitativas y cuantitativas (About the use of qualitative and quantitative practices). *Revista internacional de sociología, 21*:101–126.

Carter, E. and Witworth, A. (2017) Work activation regimes and well-being of unemployed people: rethoric, risk and reality of quasi marketization in the UK programme. *Social Policy & Administration, 51*(5): 796–816. https://doi.org/10.1111/spol.12206

Fernández, M. and Calero, J. (2014) Los costes no monetarios del abandono educativo prematuro. Una estimación en términos de años de buena salud (The non-monetary costs of early school leaving: An estimate in terms of years of good health). *Educación XX1: Revista de la Facultad de Educación*, *17*(2): 241–263. https://doi.org/10.5944/educxx1.17.2.11490

Fernández, G. (ed.) (2015) *Hacia un sistema más inclusivo de garantía de rentas en España: diferentes alternativas de desarrollo (Towards a More Inclusive Income Guarantee System in Spain: Different Development Alternatives).* Madrid: Fundación FOESSA.

Flores Martos, R. (2016) *La transmisión intergeneracional de la pobreza: factores, procesos y propuestas para la intervención (The Intergenerational Transmission of Poverty: Factors, Processes and Proposals for Intervention).* Madrid: Fundación FOESSA. Available at https://www.eapn.es/publicaciones/249/la-transmision-intergeneracional-de-la-pobreza-factores-procesos-y-propuestas-para-la-intervencion Accessed: 07-04-2019.

Foessa (2019) *VIII Informe FOESSA: La exclusión social se enquista en una sociedad cada vez más desvinculada (VIII FOESSA Report: Social Exclusion is Entrenched in an Increasingly Unlinked Society).* Madrid: Fundación FOESSA.

Foessa (2014) *VII Informe Foessa sobre Exclusión y Desarrollo social (VII FOESSA Exclusion and Social Development Report).* Madrid: Fundación FOESSA.

Flick, U. (2017) Mantras and Myths: The disenchantment of mixed-methods research and revisiting triangulation as a perspective. *Qualitative Inquiry, 23*(1):46–57. https://doi.org/10.1177/1077800416655827

Förster, M., Maas, F. and Marin, B. (2003) *Understanding Social Inclusion in a Larger Europe: An Open Debate. Proceedings from the General Assembly Meeting of the European Centre, December 2002.* Vienna: European Centre for Social Welfare Policy and Research.

International Labor Office (ILO) (2018) *World Employment and Social Outlook — Trends 2018.* Geneva: ILO. Available at https://www.ilo.org/global/research/global-reports/weso/2018/WCMS_615672/lang--en/index.htm Accessed: 19-07-2019.

Kornblit, A. L. (2007) Historias y relatos de vida, una herramienta clave en metodología cualitativa (Stories and life stories, a key tool in qualitative methodology). In Kornblit, A. L. (ed.) *Metodologías cualitativas en ciencias sociales (Qualitative Methodologies in the Social Sciences).* Buenos Aires: Editorial Biblos.

Kvale, S. (2008) *Las entrevistas en Investigación Cualitativa (Interviews in Qualitative Research).* Madrid: Morata.

Le Blanc, D. (2015) Towards integration at last? The Sustainable Development Goals as a network of targets. *Sustainable Development, 23*(3):176–187. https://doi.org/10.1002/sd.1582

Laparra, M., Pérez-Eransus, B., Sarasa, S., Renes, V., Pérez-Yruela, M., Trujillo, M., Subirats, J. and Obradors, A. (2007) Una propuesta de consenso sobre el concepto de exclusión social (A consensus proposal on the concept of social exclusion). *Revista del Tercer Sector, 5:* 15–57.

Martínez-Virto, L. (2018) How do the Spanish families face up the crisis? The types and the consequences of the coping strategies. *Metszetek / Cross-sections, 7*(2): 156–170. https://doi.org/10.18392/metsz/2018/2/7

Marshall, T. H. and Rees, A. M. (1985) *T. H. Marshall's Social Policy in the Twentieth Century.* London: Hutchinson.

Mestrum, F. (2014) Las políticas sociales desde una perspectiva mundial (Social policies from a global perspective). *Documentación social, 175:* 15–34.

Mullin, J. W. and Arce, M. (2008) Resilience of families living in poverty. *Journal of Family Social Work, 11*(4): 424–440. https://doi.org/10.1080/10522150802424565

Muntaner, C., Benach, J., Quinlan, M., Solar, O., Santana, V. (2010) *Empleo, trabajo y desigualdades en salud: Una visión global (Employment, Work and Health Inequalities: A Global Vision).* Barcelona: Icaria.

OECD (2017) *Understanding the Socio-economic Divide in Europe*. Available at https://www.oecd.org/els/soc/cope-divide-europe-2017-background-report.pdf. Accessed: 11-07-2019.

ORSN (2019) *Informe sobre pobreza y desigualdad en Navarra (Poverty and Inequality in Navarre Report).* Boletín tendencias. Pamplona: Observatorio Realidad Social Navarra.

Pettersson, P (2012) *Does Unemployment Have Any Effects on Self-esteem and Does Social Support, Coping and Perceived Control Have Positive Impacts on Self-esteem During Unemployment?* Teori och metod med tillämpning och examensarbete. Högskolan Gävle. Available at http://www.diva-portal.org/smash/get/diva2:536319/FULLTEXT02 Accessed: 15-07-2019.

Sachs, J., Schmidt-Traub, G., Kroll, C., Lafortune, G. and Fuller, G. (2019) *Sustainable Development Report 2019*. New York: Bertelsmann Stiftung and Sustainable Development Solutions Network (SDSN).

Silver, H. (2012) *Framing Social Inclusion Policies.* New York: World Bank Social

Silver, H. (2015) The contexts of social inclusion. *United Nations Department of Economic and Social Affairs DESA Working Paper* No. 144. Available at https://www.un.org/esa/desa/papers/2015/wp144_2015.pdf Accessed: 15-07-2019.

Shinn, M. (2010) Homelessness, poverty and social exclusion in the United States and Europe. *European Journal of Homelessness, 4:* 19–44.

Stuckler, D., Basu, S., Suhrcke, M., Coutts, A. and McKee, M. (2011) Effects of the 2008 recession on health: a first look at European data. *The Lancet, 378*(9786): 124–125. https://doi.org/10.1016/S0140-6736(11)61079-9

Wacquant, L. (2010) *Castigar a los pobres: El gobierno neoliberal de la inseguridad social (Punish the Poor. The Neoliberal Government of Insecurity).* Barcelona: Gedisa.

SARMITĖ MIKULIONIENĖ AND GRAŽINA RAPOLIENĖ *

Perceived Incentives and Barriers to Social Participation: The Case of Older Adults Living Alone in Lithuania

Intersections.EEJSP
6(2): 176–194.
DOI: 10.17356/ieejsp.v6i2.626
http://intersections.tk.mta.hu

* [mikulioniene@lstc.lt] (Lithuanian Social Research Centre);
[grazina.rapoliene@lstc.lt] (Lithuanian Social Research Centre)

Abstract

Social (non)participation is one of the key elements associated with social exclusion in old age. Scholarship about this topic tends to rely mainly on quantitative research from Western and Northern European countries. The aim of this article, based on qualitative interviews with older people (N=27) in Lithuania, is to give some insight into how older people in an Eastern European country experience social participation, and the reasons they offer for abstaining from engaging in it. Findings are contradictory: social participation is valued by older people for both direct and indirect reasons (e.g. a desire to simply be among people), but they hesitate to participate for a variety of reasons. The article contributes to the academic discussion by providing insights into older people's perspectives about social participation, their preferences, and, in particular, the backdrop that particular organizations (such as the church) can play in promoting social participation and consequently strengthening the social inclusion of older adults in post-communist countries.[1]

Keywords: *social participation, motives for engaging in social participation, older people, living alone, qualitative methodology.*

[1] This research was funded by a grant (No. GER-001/2017) from the Research Council of Lithuania, under the national research programme, 'Welfare Society'. We thank M. Gedvilaitė-Kordušienė and A. Jurkevits for their efforts in collecting the original data.

1. Introduction

Old-age social exclusion tends to be researched in quantitative terms, and by focusing on the development of various scales of measurement (Van Regenmortel et al., 2016; Walsh et al., 2017). As such, the related studies tend to be focused on quantifying social participation indicators. Input from qualitative research is relatively scarce (Perissinotto and Covinsky, 2014). This may be one of the reasons why we do not know what encourages social participation amongst older people, and what the obstacles are to their engagement in social life. Research on old-age social exclusion has demonstrated that social participation is one of the main and most frequent domains included in different schemes of social exclusion (Van Regenmortel et al., 2016; Van Regenmortel et al., 2018; Vrooman and Hoff, 2013; Walsh et al., 2017). Usually, such research does not, however, provide details about the kinds of activities that older people are involved in (Galenkamp et al., 2016). Older people's own voices are seldom taken into account in this regard in the scholarly debate, and policy makers tend not to be informed about the social activities that older people find most attractive.

Old-age social exclusion in Lithuania, as well as in most Eastern and Central European countries, is not a topic that has received a great deal of attention. The scarce literature suggests that the social exclusion that older people experience in this region may be more complex, and is probably more acute, than the scholarship on this area acknowledges. Older people (i.e., those aged 60 or older) in Eastern and Southern European countries are more likely than their counterparts in Nordic European countries to be socially excluded (Eurofound, 2018: 13–16; Ogg, 2005). Older residents in post-communist countries report the highest levels of age discrimination in Europe (Rapolienė, 2015). A comparison of people aged 50 or older in 13 European countries also revealed that respondents from Eastern and Southern European countries were less likely to participate in social activities (Banks et al., 2009). Furthermore, and in contrast to the situation in Western and Northern European countries, the use of ICT among the older segments of the population in the former countries is rather limited (Lamura et al., 2018). Intergenerational solidarity in Lithuania is extremely weak: the proportion of both young and old adults reporting cross-age friendships is the lowest among 25 European countries (Dykstra and Fleischmann, 2016).

A recent representative study (Mikulionienė et al., 2018) in Lithuania revealed significant differences in the level of loneliness of people aged 60 and above living alone compared to those not living alone (1.65 and 1.27 points out of three for social loneliness, and 1.24 and 0.65 points out of three for emotional loneliness on the J. De Gierveld Loneliness Scale, respectively). This study also showed that older people living alone are significantly less involved in the social activities which are most popular among older people. Thus, the presumably acute social exclusion experienced in old age and low level of social participation of older people, especially those living alone in Lithuania, is a case worthy of researchers' attention. Research preferably based on qualitative methodology can

play a role in filling the above-mentioned gap and 'giving voice' to study participants.

The aim of this article is to shed light on how older people living alone in Lithuania regard social participation and the social activities they engage in. The findings of this study are expected to contribute to the scholarly debate on social participation as a component of old-age social exclusion. Additionally, by being complemented with evidence from an Eastern European country, they may contribute to European social policy, since the scholarly debate on social participation in old age has mainly been shaped by research from Western and Northern Europe.

2. The concept of social participation in old age

In the literature, the benefits of social participation on the health and quality of life of different reference groups has been quite well researched (for example, Bath and Deeg, 2005; Meek et al. 2018; Shiovitz-Ezra and Litwin, 2012; Waite et al., 2014). However, researchers in the field are still discussing the scholarly definition of the former phenomenon. A review of literature reveals that there is a lack of a commonly accepted definition of social participation (Badley, 2008; Guillen et al., 2011; Levasseur et al., 2010; Piškur et al., 2013). Moreover, scholars in this area tend to use an entire cluster of cognate terms when writing about social participation: these include community involvement, social engagement, social integration, social capital, social networking, social connectedness, and social activities. Public health specialists tend to use the broader term 'participation' – which is often defined as 'involvement in life situations' (WHO 2001), while social participation is included as a specific sub-element of participation.

In the current study we have adopted the synthetic definition provided by Levasseur and her colleagues (2010: 2148) by which social participation is defined 'as a person's involvement in activities that provide interaction with others in society or the community.' Whereas the degree of involvement and the scope of activity-related goals can vary broadly, the taxonomy of social activities proposed by Levasseur and her colleagues (2010) brings more clarity to the conceptual debate on social participation. This taxonomy is especially useful if one wants to distinguish the concept of social participation (including social contact, joint activities, helping others, and contributing to society) from more general forms of participation (including preparation for interaction) and specified forms of social engagement (helping others and contributing to society).

We know even less about how older people themselves narrate their social participation and reasons for (not) engaging in it. Reasons for participation are closely related to motives for going out or remaining at home, as well as to well-being (Everard, 1999). Typically, older people's family relationships (McFarland et al., 2013) and relationships with friends (Blieszner et al., 2019) have been studied. Thus, our study adds knowledge about the rarely studied specific segment of older people's social participation – namely, about their participation in organized public (cultural, religious, community) events. This type of social participation, especially

for older people who live alone, often becomes almost the only channel for socialization.

3. Data and methods

To obtain data on the self-reported social participation of older people, a qualitative semi-structured interview method was chosen. This method makes it possible to authentically record older people's perspectives without imposing the researcher's own opinions (Barnes et al., 2006; Wong et al., 2017). The set of specific questions exploited in this study inquired into informants' favorite social activities, including helping others and volunteering, going out (if at all) for public cultural / religious / community events, and explanations for (non) participation.

The selection criteria for informants were therefore as follows: non-working permanent residents of Lithuania aged 60 and over, and living in the community in a single-person household. In order to ensure the collection of a heterogeneity of experiences, informants were included in the study in relation to different characteristics – gender, age, marital status (i.e., single, widower, divorced, have children or do not have children), education, place of residence (city, town, or rural area), ethnicity, and duration of living alone (characteristics of informants are provided in Table 1). Informants were interviewed in the Lithuanian, Russian, and Belarusian languages.

Fieldwork was conducted from June 2017 to August 2017 in Vilnius, in a village and smaller town within the Ignalina district, as well as in Raseiniai town and district. In total, 46 people meeting the selection criteria were asked to participate in the study, and 27 (59 per cent) agreed. Since we are interested in investigating social participation as one of the principal domains of old-age social exclusion (Walsh et al., 2017), it seems reasonable to pay attention to refusal to participate in the study, as this could have been a sign of deep and constant exclusion – either voluntary or non-voluntary. Thus, we found that the invitation to participation in the study was rejected due to: (a) an abundance of caution or perceptions of the interview being a potential risk to the security of the individual and their property (e.g., 'I never give such interviews'); (b) a lack of self-confidence (e.g., 'Oh, I don't know what to say, let others do it...', 'Oh no, I'm afraid to say the wrong thing,' 'I don't care, I don't like to talk about myself,' etc.); (c) anticipatory doubts about the confidentiality of research (e.g., 'Well, if I need to speak about money, or something about children, well, I would not really [like to speak]'); (d) claiming to be busy and not showing up at the agreed time, which may hide further motives; or (e) acute health disorders (i.e., when a scheduled meeting had to be cancelled due to the illness or death (following after the interview agreement) of an informant).

The interviews were conducted at the informants' homes, in courtyards, in a park, and in a cafe. They were recorded by voice recorder or phone and transcribed.

The study was carried out in line with the fundamental ethical principles of anonymity, privacy, and confidentiality. Thus, the names of participants and other

personal information are not made public. Instead, codes were assigned to participants.

Qualitative content analysis (Hsieh and Shannon, 2005) and an inductive coding method (using the software Maxqda) was employed, and the primary step of the two coders whose help we enlisted was to create a preliminary tree of codes. Subsequently, all material was coded by one researcher based on a harmonized code tree and subsequently by adding *in vivo* codes. Next, the material was reviewed and corrected (if necessary) by another investigator. The segments about social participation were analyzed using the principles of grouping and condensation based on similar values.

4. Impetus for engaging in social participation activities: perspectives of older people

As would be expected, our starting point is that older people's narratives about why they do (do not) participate in social activities is important, which is why we paid particular attention to what our informants conveyed in terms of their motives for going out with people, and their considerations about the obstacles to engaging in social participation, to name but a few points of interest.

4.1 Church as pivot of activity in old age

When asked about participation in public cultural, religious, and community events, informants first mentioned church and other related activities, such as singing in a choir, participation in charitable activities, coffee afternoons with a priest, music concerts, etc. Participation in mass and church events was claimed to provide spiritual and psychological comfort, especially after the passing of relatives. One informant stated, for example:

> The Church helps me a little to calm down after certain misfortunes; you go there, you're there with yourself, and it still helps… (5WI[2]).

Participation in church activities seems therefore to be more satisfying than participation in the secular events that are available. In this regard, an informant states:

> Some concerts happen, we don't really enjoy these. Say, you go by bike, then you think, can't it be over quicker, you might even drive to the cemetery (6WI).

Relationships with the church sometimes seemed to be organic, and closely associated with physical identity and the capabilities of the body:

[2] All informants were given codes: namely, the Arabic numerals 1–27 = the number of the interview; Letter W = woman, letter M = man; Roman numerals I = aged 60–70, II = aged 71 or over.

> I did not use to walk, I could not reach the church (8MI);
>
> I go to the choir in the church on foot, and I go back on foot as well. There are those who drive and could give me a lift, but for me... I have to go [walk] at least four kilometers a day (27WII).

Only bad weather conditions seemed to prevent our informants from going to church. This was the case when conditions were slippery or sleet had fallen in the city (1WI) and when informants were faced with snowy or slushy roads in the countryside (6WI, 17MII). In these cases, going to mass was replaced by listening to a broadcast by the religious radio channel 'The Voice of Mary' (17MII).

Although several informants reported that they visited church every Sunday (which could, of course, be a socially desirable answer), there are extremes involving both occasional participation in mass that takes place before a music concert ('I listen to mass if it happens before a concert, but in other cases – no' [9WI]), and of very intensive participation ('It's like a part-time job, singing in the Cathedral' [2WI]).

Summing up the responses on this theme, the data gives the impression that visiting church is not only one of the most intensive expressions of social participation among the older people we interviewed, but also one that meets a wide range of needs. Older people in Lithuania have a lot of different incentives to attend church events. It is therefore not surprising that our informants mention visits to church as the 'gold standard' for a person's independent mobility and vitality, as well as a boundary-making activity that distinguishes those in poorer health from those who are doing better, health-wise. It was therefore quite common for our informants to highlight that when they feel a lack of spiritual peace, church-attendance becomes a must. In short, informants report a rich list of sources of motivation for their social participation in the form of church attendance. Thus, the church should potentially be considered an organization that could be enlisted when trying to increase social participation in old age in Lithuania. The scholarly debate on social participation does not, however, acknowledge the role that organizations in general, and church in particular, could play in increasing participation in social activities in old age.

4.2 Participation in public events

Another category of social activities investigated in this study is participation in public events, such as city festivals, the events of regional cultural centers, theatre performances, concerts, exhibitions, and art collectives. Among public events, residents of Vilnius mentioned 'Kaziukas,' 'Joninės,' and other festivals, as well as 'Cultural night' (2WI, 4WII). One informant was especially positive about 'Coffee for seniors' as a means of social inclusion and interaction (this is an initiative that involves offering free coffee to older people, which most cafés roll out for a limited

time period). She mentioned that she had once café-hopped with a friend from one place to another:

> It was important to see those cafes, because there's no other opportunity to go to the café... you get to meet people, to communicate (5WI).

Some people from other regions reported to having participated in activities at their local cultural center, such as in driving-related services, bringing older women to church (23MII), or supporting organizers during events for children (8MI). Some also talked about their participation in Christmas celebrations or in a newly invented festival called 'Dumpling Day' (20MI). Informants seem to like to participate in trips to different places in Lithuania that are organized by local communities (24WII), or by the Third Age University (9WI, 11WII). A wish to go out and visit other towns or neighboring countries was treated as an indicator that mourning processes had come to an end for those who had been grieving after having lost a loved one:

> A willingness to go where you want, to travel wherever, to just go... In short, such a willingness is to return to normal life as much as possible (22MII).

Another informant noted the importance of being among people, and stated a preference for attending concerts due to this need:

> Concerts in Tytuvėnai ... somehow I went there, to be among living people a little (22MII).

Those who said that they like to visit concerts or the theatre stressed that these activities have been a personal preference or passion of theirs throughout their lives. The following excerpts attest to this:

> I'm going to concerts, I love theatre, I really liked a lot of things… all my life I've loved the theatre (9WI);

> I love the theatre to death! ... Onutė and I went everywhere! We went to exhibitions, the museum, the theatre, the cinema – well, anyway – it was as if we were starving ... So everywhere, we wanted to be everywhere, to see everything (15WII).

Some informants also mentioned their participation in the activities of art collectives, such as singing in secular choirs (3WII, 27WII).

There is also evidence that civic engagement/political activity continues later in life, even after a long break, as was the case for the informants from the national Belarusian minorities. This group have had to be silent for most of their lives, but now they were enjoying their newfound freedom in Lithuania:

> I have a big baggage of this... activity (laughs) that I have not used, because all my life I was just sitting out… and on topics like this... in general... I was silent. And now I can express (laughs) myself, yes? (15WII).

Another informant mentioned participation in events for former deportees[3] – in meetings, presentations of books, annual congresses, etc. (4WII).

Along with their descriptions of the activities in which they engage, some informants mentioned the people that invite them to visit places and encourage them to get involved (e.g. 'A cool priest, really' [6WI], 'The priest invited me to his place tomorrow, he was here' [8MI]). Informants who mentioned such people seem to feel grateful that they continue to be invited out, despite their low level of involvement due to extremely limited health resources. One informant said, for example:

> [She] does not envy [judge, criticize] me at all… that I don't participate there at all, do nothing, I don't do needlework, and my eyes are weak, and my legs are not always strong (27WII; 15WII).

Thus, our data attest to the fact that the people who encourage the participation of the older people are important not only due to their support related to engagement in activities, but even more because they acknowledge the situation in which our informants find themselves.

Summing up the narratives of older people about their participation in public events, it turns out that they describe different sorts of cultural events in a variety of ways. For some, these activities seem to be an anti-loneliness remedy: it is good to be among other people. Some of them interpret their renewed participation in community events and sightseeing tours after a grieving period as testament to the fact that their bereavement period is coming to an end, since 'interest in life' has been regained. Thus, the older people we interviewed perceive organized socio-cultural events, such as attending cafés and exhibitions or participating in local festivals and sightseeing tours, as a means of exploring their surroundings and satisfying their curiosity and/or emotional needs. One can see that organized social gatherings, especially when attractive people are involved that invite older people to participate and accept them, seem to offer a self-esteem boost.

When we asked our informants if they would participate in any group activities if someone invited them, one informant said that she has such plans – for some time she has been invited to join the ethnic Samogitian group, she dreams about learning the German language and attending lectures about medicine at the University of the Third Age (4WII). Other informants reported that they would join if they met the group's requirements (3WII), or if the group seemed

[3] Victims of mass Soviet deportations carried out in Lithuania in 1941 and 1945–1952. Civilians were forcibly transported to labor camps and other forced settlements in remote parts of the Soviet Union, particularly Siberia.

interesting (5WI) and matched their wishes (14WI). In some cases, informants stated that it would be good to find new friends (4WII) or just be among people (22MII). However, cases of doubt or refusal were also expressed strongly, raising the question why some older people abstain from participating in social life.

5. Impediments to engaging in social participation activities: the perspectives of older people

The data that we collected provided rich information about the ways in which older people articulate why they restrict their social activities.

5.1 Weakening health intertwined with old age

An important self-reported obstacle to social participation for older people leaving alone seems to be limited health resources. This was expressed differently, from simple reasons (e.g., 'I have no health [my health is poor])' [10WII], 'I could not anymore' [18WII]) to complications with walking or sitting (24WII, 16WII, 21MII), heart problems (20MI), back pain, hospitalization (15WII), sight and hearing problems (19MII), and the need for adequate rest (17MII). Some refer to experiencing a sudden short-term loss of their abilities:

> The neighbor died, Jesus, I went to the cemetery, I couldn't walk, I couldn't walk. I told her I could not go to the other grave. Barely, with a stick, I came home. I said, no more, I will not go anywhere anymore (21MII).

There were also some who expressed a fear of experiencing such a loss of ability:

> I do not want to go anywhere, I'm afraid, I'd fall to my death, only draw misery to myself, nothing will come of me, there will be no health [I'll lose my health entirely] perhaps (26WII).

As the excerpts below indicate, some of our informants seem to regard (old) age itself as the main cause of the end of their participation in social activities:

> An old man, where will I go, a man like me? (7MII);
>
> We are too old to go out at night (4WII);
>
> But what of me – a dancer? Earlier, I indeed felt alive, I would have gone anywhere (26WII).

Some stress that they are glad to still be able to buy food in the shop nearby on their own, thus their current expectations in respect of going out are limited (12WI, 26WII). The articulation of a refusal to take part in cultural events seems to be closely related to both limited health resources and the notion that old age

poses a challenge. The following excerpt from the interviews attests to this very fact:

> There is no more want [desire], you know... Either my leg hurts or it is something else again (smiles). Already, you see, I am no longer young (1WII).

5.2 Lack of time or interest

Another self-reported reason for non-participation was lack of time:

> My friend participates there [in the Third Age University]. I still don't. I haven't had time… (5WI);

> Well, here with my life, I was drowning in such serious work that there simply remained no time for this [activity] for me (22MII).

A lack of interest in specific activities was also mentioned, as the following excerpt attests:

> I'm no longer interested in these events. If it's some kind of play, I watch it on TV. And well, dances no longer interest me. Such things. That was [I did those things] in my younger days (19MII).

Experiencing an increase in the need for silence was also something that some of our informants admitted (25WII); in such cases, watching TV was described as a better option (19MII, 25WII).

In distant regions, there appears to be only a few events to choose from due to a general lack of interest or sparse population:

> Sometimes there comes an artist or two, maybe they sing, then maybe ten people come [to listen to them] … No, here in Gaidė it has already ended, there are no young people, and those who were here have left (7MII).

The fact that sometimes the organized events that are on offer are targeted at audiences with which the informants could not identify was another obstacle for participation. For example, one of them related this sentiment by saying: 'Once I went, I understood absolutely nothing. I was fed up with sitting there' (27WII). Others alluded to the fact that they did not find some of the activities on offer to be suitable for them. One of our informants explained this to us by saying: 'I do not know, somehow I... Volunteering is somehow more for young people or someone else. Well, somehow I really did not think…. I absolutely did not think about it' (11WII). A lack of information about events or the possibility for them to join a voluntary organization was also mentioned (6WI, 9WI).

Our data suggest that some non-participation can be explained by what seems to be an inactive type of personality (13WII). Some of our informants talked about avoiding making new acquaintances due to mourning or a fear of intimacy:

> So far, I have not engaged much in these friendships ... those that come, especially for a longer time, they simply do not work (17MII);

> Babe, not anymore (smiles). I will not look for these things, no. No. No need for lovers (smiles) (8MI).

5.3 *Physical and socio-cultural barriers*

A feeling of reluctance to come back in the dark alone after participating in a social activity in the winter was mentioned (4WII, 9WI), and some expressed that wanting to have somebody to share impressions with after having partaken in activities was something they lacked (9WI, 10WII). Feeling devalued is also something that some of our informants commented. For example, one of them said:

> Honestly, it seems that a person is so unsuitable for anything that he even has nobody to go to a concert with (9WI).

She lacks a friend who knows a foreign language as a reason for abstaining from taking a trip abroad (9WI). As obstacles to social activities, several barriers of a material and spatial character were listed: scarce financial resources (10WII, 15WII, 27WII), a lack of transportation (18WII), and unfavorable winter traffic conditions (26WII).

Thus, the material presented in this section identifies a set of personal arguments that older people employ to explain their withdrawal from social activities and consequent voluntary social exclusion. The ways in which our informants articulated why they abstain from participating in social activities may be classified into several categories: a lack of health resources, a lack of time resources, a lack of interest in the events that are available, a lack of information, as well as 'self-ageism' (self-identification as being 'too old'), psychological reasons (mourning, long-term loneliness, and a decline in social skills), and environmental barriers. These explanations are mainly based on different unpleasant previous experiences – when informants had felt physical discomfort because of their poor health, or the fact that they did not feel safe while moving around on their own, or that they felt like outsiders at a social gathering because they had lost their peer-companions with whom to share such experiences. Another reason was that they no longer felt self-confident about starting a conversation with younger people because they had different tastes regarding the content of cultural events.

6. Discussion and conclusions

In this article, we attempt to personalize the widely used and even more widely understood concept of the social participation of older people. To our knowledge, this is the first time that the topic of social participation in the public events of community-dwelling older people living alone in an Eastern European country – Lithuania – has been presented. The research revealed contradictory findings: social participation is valued by older people for both direct and indirect reasons (i.e., a simple desire to be among people), but they hesitate to participate in it for a variety of reasons. Keeping in mind the importance of the former, the reasons for abstention from social activities specified by informants appear to contradict the value they award to social participation. This suggests that, from the subjective perspective of older people, options for increasing social participation are limited, as are the intentions and resources available to the latter. Obviously, there are reasons for non-participation that are outside the scope of individual control, such as environmental, cultural, social, and physical barriers, which should be addressed by social policy.

Although we could not identify relevant articles that disclose the incentives and obstacles to engaging in social participation that involve the voices of older people from Eastern Europe, we can verify our results with earlier research in an indirect way.

The importance of religious activities in connection to health, as revealed by our study, has some parallels with earlier research. Sowa and colleagues (2016) noted that religious activity is often associated with multimorbidity; thus, it may be driven by a need for comfort. It is also true that religious involvement broadens a person's social network, increases their social support (Koenig et al., 2014; Krause and Hayward, 2014), and can compensate for the vanishing social networks of older people (Sowa et al., 2016; Woźniak, 2012). In fact, church might be the only center for social activity that is accessible in distant regions (Kędziora, 2013; Sowa et al., 2016). Nevertheless, the spiritual (or transcendental) dimension of religion should not be disregarded in attempts to explain increased religious participation in old age, as highlighted in the theory of gerotranscendence (Tornstam, 2005). In our sample, religious activities were not replaced by other social activities that are broadly accessible in the capital, which were often viewed by older people as unsatisfying. The need for comfort in situations of existential anxiety (e.g., serious health issues, the loss of partner or child, etc.) (Baltes and Baltes, 1990; Freund and Baltes, 1999), as well as an increasing awareness of approaching death, might be of striking importance, even if this is not verbalized. The application of socio-emotional selectivity theory (Carstensen, 1993; 1998; 2006) may perhaps be extended, from more carefully chosen social partners to a change in the priority of activities for older people due to a growing awareness of the limitations of time. Accordingly, older people might seek out higher quality activities and forms of satisfaction rather than seeking to maximize the quantity of social activities.

Narratives related to participation in religious events revealed the desire 'as much as I can,' while the main reason for non-participation was a decline in health

status. This is consistent with the findings of other research. A decrease or cessation in social participation and consequent social exclusion is frequently related to chronic health problems or a general decline in health (Bowling, 1995; Cavelli et al., 2007; Meulenkamp et al., 2013; Strain et al., 2002). However, a study that involved six Western European countries (Galenkamp et al., 2016) led to contradictory findings, suggesting that people with multi-morbidity attend public events more often. Thus, a decline in health, the main reason given for non-participation in social activities, together with other universal and socially acceptable explanations for the latter (e.g., a lack of time), might mask a lack of motivation, or (self-)ageism (i.e. respondents' considering themselves to be too old for social participation), both of which are naturally connected to health decline in the narratives of older people.

If one considers the general life course trends related to religiosity to follow a U-shaped pattern of involvement, with the highest levels of participation in the earliest and the latest years of life (Timonen et al., 2011; Wink and Dillon, 2001), for the countries of Eastern Europe one should also take into account the circumstances of the communist regime, in relation to which differences may even be identified between the former USSR and Warsaw Pact countries. Polish researchers note that the cohorts that reached an older age tended to be religious throughout their lives (Sowa et al., 2016; Woźniak, 2012), which was not the case in Lithuania. There, the church was formerly marginalized, and participation in its activities was obstructed by authorities at different levels. In Lithuania, we should rather talk about a renaissance of religiosity after the restoration of independence, with many new (or returning) members of religious communities.

Another issue in relation to which Lithuanian (and probably Eastern European) realities differ from those of Western European countries is the strong association between volunteering and social leisure participation (Galenkamp et al., 2016). As can be seen from our material, social participation as a form of social contact with or without specific goals (Levasseur et al., 2010) is articulated richly and in many different ways, whereas the narratives of the older generation that referred to social engagement activities involving helping others on a broader scale, or contributing to society, are very sparing. Volunteering is scarce and peripheral among the social activities of older people in Lithuania. In general, volunteering is discredited in society, as it has negative connotations in the memories of people who lived during the times of the Soviet Union, being associated with 'voluntary forcible' activities.[4]

Volunteering projects are mainly now aimed at youth; thus, there is a gap that could be filled with special initiatives aimed at older people. Volunteering projects carefully designed for older people would reduce their social isolation and help them to feel useful, as well as allow them to better use their resources for the benefit of society. Such activities could potentially include the provision of, if not health-related support (e.g., physical or emotional support), then professional

[4] This is a canonic expression from Soviet times – *добровольно принудительно [dobrovol'no prinuditel'no]* (Russian) –, which involves a combination of words with the opposite meanings. It actually discredited the term 'voluntary' and is still used as a reference to *imitation* of activity.

competences (e.g., legal, financial, medical, technical, etc.), support with language learning, help for pupils from socially disadvantaged families with homework, etc. Older people as well as youth would profit more from intergenerational projects, which might include art, music, history or memory, handicrafts, etc. Due to the major role of church in the social activities of older people, its involvement in volunteering projects would contribute to their success. As also noted in earlier research, members of religious communities are more willing to join voluntary activities that are supported by their churches (Wilson and Janoski, 1995).

This study, however, has some limitations. First, although we tried to ensure a diversity of informants, our study did not include older people whose mental or physical condition could have been an obstacle to interacting with researchers. However, it is known from other studies that poor health is a risk factor for social exclusion, reducing the ability of a person to maintain the usual social relationships. (Eurofund, 2018: 13–16; Ogg, 2005; Lamura et al., 2018; Dykstra and Fleischmann, 2016) Second, in seeking to add to the knowledge about the unique nature of the social participation of older people in post-soviet Eastern and Central Europe, our insights are based on empirical data from Lithuania only. To address both limitations and verify the current findings, future investigations into social participation as an important element of old-age social inclusion should be undertaken that employ sampling across several Eastern and Central European countries.

This study allows us to formulate recommendations for social inclusion policy that may help promote the social participation of older people living alone. The first of these is to make more intensive and diverse use of the pre-existing and highly valued channels of socialization of the elderly – the church. Second, look for opportunities to strengthen socialization channels which have been less well exploited, such as participation in different public socio-cultural events that bring together people from several generations by removing social barriers (insecure public areas, ageist attitudes, age segregation, etc.) and physical ones (safe access to events [providing smooth surfaces, adequate lighting, etc.], and accessible rest areas [benches and toilets], etc.). The study also suggests that professional psychological interventions would be very beneficial for older people who limit their social participation themselves due to mourning or a loss of social skills that result from living alone for a long time. To date, the underdeveloped participation of older people in Lithuania in the volunteer movement indicates that this channel is particularly untapped in terms of encouraging the direct and sensible social involvement of older people living alone.

References

Badley, E. M. (2008) Enhancing the conceptual clarity of the activity and participation components of the International Classification of Functioning, Disability, and Health. *Social Science and Medicine, 66*(11): 2335–2345. https://doi.org/10.1016/j.socscimed.2008.01.026

Baltes, P. B. and Baltes, M. M. (1990) (eds.) *Successful aging: Perspectives from the behavioral sciences*. New York: Cambridge University Press. https://doi.org/10.1017/CBO9780511665684

Banks, L., Haynes, P. and Hill, M. (2009) Living in single person households and the risk of isolation in later life. *International Journal of Ageing and Later Life, 4*(1): 55–86. https://doi.org/10.3384/ijal.1652-8670.094155

Barnes, M., Blom, A., Cox, K., Lessof, C. and Walker, A. (2006) *The social exclusion of older people: Evidence from the first wave of the English Longitudinal Study of Ageing (ELSA)*. London, England: New Horizons programme, Office of the Deputy Prime Minister.

Bath, P. A. and Deeg, D. J. (2005) Social engagement and health outcomes among older people: Introduction to a special section. *European Journal of Ageing, 2:* 24–30. https://doi.org/10.1007/s10433-005-0019-4

Blieszner, R., Ogletree, A. M. and Adams, R. G. (2019) Friendship in later life: A research agenda. *Innovation in Aging, 3*(1), igz005. https://doi.org/10.1093/geroni/igz005

Bowling, A. (1995) What things are important in people's lives? A survey of the public's judgements to inform scales of health related quality of life. *Social Science and Medicine, 41*(10): 1447–1462. https://doi.org/10.1016/0277-9536(95)00113-L

Carstensen, L. L. (1993) Motivation for social contact across the life span: A theory of socioemotional selectivity. *Nebraska Symposium on Motivation, 40:* 209–254.

Carstensen, L. L. (1998) A life-span approach to social motivation. In Heckhausen J. and Dweck, C. S. (eds.) *Motivation and Self-regulation across the Life Span*. New York: Cambridge University Press. 341–364. https://doi.org/10.1017/CBO9780511527869

Carstensen, L. L. (2006) The influence of a sense of time on human development. *Science, 312:* 1913–1915. https://doi.org/10.1126/science.1127488

Cavelli, S., Bickel, J. and D'Epinay, C. (2007) Exclusion in very old age: The impacts of three critical life events. *International Journal of Ageing and Later Life, 2*(1): 9–31. https://doi.org/10.3384/ijal.1652-8670.07219

Dykstra, P. A. and Fleischmann, M. (2016) Are societies with a high value on the active ageing index more age-integrated? In Zaidi A., Harper, S., Howse, K., Lamura, G. and Perek-Białas, J. (eds.) *Building Evidence for Active Ageing Policies: Active Ageing Index and its Potential*. Singapore: Palgrave McMillan. 19–37. https://doi.org/10.1007/978-981-10-6017-5

Eurofound (2018) *Social cohesion and well-being in Europe*. Publications Office of the European Union, Luxembourg.

Everard, K. M. (1999) The relationship between reasons for activity and older adult well-being. *Journal of Applied Gerontology, 18*(3): 325–340. https://doi.org/10.1177/073346489901800304

Freund, A. M. and Baltes, P. B. (1999) Selection, optimization, and compensation as strategies of life-management: Correlations with subjective indicators of successful aging. *Psychology and Aging, 13:* 531–543. https://doi.org/10.1037//0882-7974.13.4.531

Galenkamp, H., Gagliardi, C., Principi, A., Golinowska, S., Moreira, A., Schmidt, A. E., Winkelmann, J., Sowa, A., Van den Pas, S. and Doog, D. J. H. (2016) Predictors of social leisure activities in older Europeans with and without multimorbidity. *European Journal of Ageing, 13:* 129–143. https://doi.org/10.1007/s10433-016-0375-2

Guillen, L., Coromina, L. and Saris, W. (2011) Measurement of social participation and its place in social capital theory. *Social Indicators Research, 100*(2): 331–350. https://doi.org/10.1007/s11205-010-9631-6

Hsieh, H.-F., Shannon, S. E. (2005) Three approaches to qualitative content analysis. *Qualitative Health Research, 15*(9): 1277–1288. https://doi.org/10.1177/1049732305276687

Kędziora, S. (2013) Religijność i praktyki religijne osób starszych (Religiosity and religious practices of the elderly). In Barczyk-Nessel, A. (ed.) *Społeczny kontekst życia w okresie senioralnym*. Mysłowice, Poland: Górnośląska Wyższa Szkoła Pedagogiczna. 21–36.

Koenig, H. G., Berk, L. S., Daher, N. S., Pearce, M. J., Bellinger, D. L., Robins, C. J., Nelson, B., Shaw, S. F., Cohen, H. J. and King, M. B. (2014) Religious involvement is associated with greater purpose, optimism, generosity and gratitude in persons with major depression and chronic medical illness. *Journal of Psychosomatic Research, 77*(2): 135–143. https://doi.org/10.1016/j.jpsychores.2014.05.002

Krause, N. and Hayward, R. D. (2014) Hostility, religious involvement, gratitude, and self-rated health in late life. *Research on Aging, 36*(6): 731–752. https://doi.org/10.1177/0164027513519113

Lamura, G., Draulans, V., Barbabella, F., Barstad, J., Hlebec, V., Maskeliūnas, R. and Siren, A. (2018) *Social Exclusion and Service Use in Older Age: Recent Evidence from the European Context.* Paper presented at the INTERFASOL Final Conference – ISCH COST Action IS1311. University of Luxembourg.

Levasseur, M., Richard, L., Gauvin, L. and Raymond, E. (2010) Inventory and analysis of definitions of social participation found in the aging literature: Proposed taxonomy of social activities. *Social Science and Medicine, 71*(12): 2141–2149. https://doi.org/10.1016/j.socscimed.2010.09.041

McFarland, M. J., Hayward, M. D. and Brown, D. (2013) I've got you under my skin: Marital biography and biological risk. *Journal of Marriage and Family*, 75(2): 363–380. https://doi.org/10.1111/jomf.12015

Meek, K. P., Bergeron, C. D., Towne, S. D., Ahn, S., Ory, M. G., and Smith, M. L. (2018) Restricted social engagement among adults living with chronic conditions. *International Journal of Environmental Research and Public Health, 15*(1): 158. https://doi.org/10.3390/ijerph15010158

Meulenkamp, T. M., Cardol, M., van der Hoek, L. S., Francke, A. L. and Rijken, M. (2013) Participation of people with physical disabilities: Three-year trend and potential for improvement. *Archives of Physical Medicine and Rehabilitation, 94*(5): 944–950. https://doi.org/10.1016/j.apmr.2012.12.017

Mikulionienė, S., Rapolienė, G. and Valavičienė, N. (2018) *Vyresnio amžiaus žmonės, gyvenimas po vieną ir socialinė atskirtis (Elderly People, Single Life and Social Exclusion).* Lietuvos socialinių tyrimų centras, Vilnius: Baltoprint. Available at http://lstc.lt/download/VIENAS1.pdf Accessed 22-07-2019.

Ogg, J. (2005) Social exclusion and insecurity among older Europeans: The influence of welfare regimes. *Ageing and Society, 25*(1): 69–90. https://doi.org/10.1017/S0144686X0400278

Perissinotto, C. M. and Covinsky, K. E. (2014) Living alone, socially isolated or lonely – What are we measuring? *Journal of General Internal Medicine, 29*(11):1429–1431. https://doi.org/10.1007/s11606-014-2977-8

Piškur, B., Daniëls, R., Jongmans, M. J., Ketelaar, M., Smeets, R., Norton, M. and Beurskens, A. (2013) Participation and social participation: Are they distinct concepts? *Clinical Rehabilitation, 28*(3): 211–220. https://doi.org/10.1177/0269215513499029

Rapolienė, G. (2015) Old age stigmatization. *European Quarterly of Political Attitudes and Mentalities, 4*(1): 63–81.

Shiovitz-Ezra, S., and Litwin, H. (2012) Social network type and health-related behaviors: evidence from an American national survey. *Social Science and Medicine, 75*(5), 901–904. https://doi.org/10.1016/j.socscimed.2012.04.031

Sowa, A., Golinowska, S., Deeg, D., Principi, A., Casanova, G., Schulmann, K., Ilinca, S., Rodrigues, R., Moreira, A. and Gelenkamp, H. (2016) Predictors of religious participation of older Europeans in good and poor health. *European Journal of Ageing, 13:* 145–157. https://doi.org/10.1007/s10433-016-0367-2

Strain, L. A., Grabusic, C. C., Searle, M. S. and Dunn, N. J. (2002) Continuing and ceasing leisure activities in later life: A longitudinal study. *Gerontologist, 42*(2): 217–223. https://doi.org/10.1093/geront/42.2.217

Timonen, V., Kamiya, Y. and Maty, S. (2011) Social engagement of older people. In Barrett A., Burke, H., Cronin, H., Hickey, A., Kamiya, Y., Kenny, R. A., Layte, R., Maty, S., McGee, H., Morgan, K., Mosca, I., Normand, C., O'Regan, C., O'Sullivan, V., Savva, G., Sofroniou, N., Timonen, V. and Whelan, B. (eds.) *Fifty Plus in Ireland 2011: First Results from the Irish Longitudinal Study on Ageing (TILDA).* Dublin: Trinity College Dublin. 51–71.

Tornstam, L. (2005) *Gerotranscendence: A Developmental Theory of Positive Aging*. New York: Springer.

Van Regenmortel, S., de Donder, L., Dury, S., Smetcoren, A. S., De Witte, N. and Verté, D. (2016) Social exclusion in later life: A systematic review of the literature. *Journal of Population Ageing, 9*(4): 315–344. https://doi.org/10.1007/s12062-016-9145-3

Van Regenmortel, S., de Donder, L., Smetcoren, A. S., Lambotte, D., de Witte, N. and Verté, D. (2018) Accumulation of disadvantages: Prevalence and categories of old-age social exclusion in Belgium. *Social Indicators Research, 140:* 1173–1194. https://doi.org/10.1007/s11205-017-1817-8

Vrooman, J. C. and Hoff, S. J. M. (2013) The disadvantaged among the Dutch: A survey approach to the multidimensional measurement of social exclusion. *Social Indicators Research, 113:* 1261–1287. https://doi.org/10.1007/s11205-012-0138-1

Walsh, K., Scharf, T. and Keating, N. (2017) Social exclusion of older persons: A scoping review and conceptual framework. *European Journal of Ageing, 14:* 81–98. https://doi.org/10.1007/s10433-018-0483-2

Waite, L. J., Iveniuk, J. and Laumann, E. O. (2014) Social Connectedness at Older Ages and Implications for Health and Well-Being. In Agnew, C. R. and South, S. C. (eds.) *Interpersonal Relationships and Health: Social and Clinical Psychological Mechanisms.* Oxford: Oxford University Press. 202–231. https://doi.org/10.1093/acprof:oso/9780199936632.003.0010

Wilson, J. and Janoski, T. (1995) The contribution of religion to volunteer work. *Sociology of Religion, 56*(2): 137–152. https://doi.org/10.2307/3711760

Wink, P. and Dillon, M. (2001) Religious involvement and health outcomes in late adulthood: Findings from a longitudinal study of women and men. In Plante, T. and Sherman, A. (eds.) *Psychological Perspectives*. New York: The Guilford Press. 75–106.

Wong, A., Chau, A. K. C., Fang, Y. and Woo, J. (2017) Illuminating the psychological experience of elderly loneliness from a societal perspective: A qualitative study of alienation between older people and society. *International Journal of Environmental Research and Public Health, 14*(7): 824. https://doi.org/10.3390/ijerph14070824

Woźniak, B. (2012) Zaangażowanie religijne a stan zdrowia osób w wieku podeszłym: mechanizmy zależności, wybrane wyniki badań (Religious involvement and health status in older people: Mechanisms of interaction, selected results). *Przegląd Socjologiczny, 61*(2): 207–242.

Authors' Biographies

Emese Éva Angyal is a PhD student at the Doctoral School of Sociology at Corvinus University of Budapest. She received her BA and MA at Eötvös Loránd University in Sociology. She is senior member of Angelusz Róbert School of Advanced Studies in Social Sciences. She is writing her doctoral dissertation on the structure of online political participation in the Hungarian society.

Viktor Denisenko is an Associate Professor at the General Jonas Žemaitis Military Academy of Lithuania and an Assistant Professor at the Vilnius University. He defended his doctoral thesis, *The image of the Baltic States in Russian periodical press in the context of geopolitical changes (1991–2009)* at Vilnius University in 2016. His area of scientific interests includes political communication, propaganda, information warfare, and media literacy.

Zita Fellner is a PhD student at the Doctoral School of Economics at Corvinus University of Budapest and economic analyst of the Central Bank of Hungary. She received her first MA at Corvinus University of Budapest in Finance and the second one at Eötvös Loránd University in Survey Statistics. Her research interests are household indebtedness and survey methods in economics and social sciences. She is writing her doctoral dissertation on the financial stability aspects of household lending.

Miklós Illéssy is a Research Fellow at the Centre for Social Sciences, Eötvös Loránd Research Network. He is specialized in innovation, organizational changes, learning organizations and the impacts of technological development on employment. His latest publication is 'Creative Workers in Europe. Is It a Reserve of the "Would-Be Entrepreneurs?"' (in Bruno Dallago and Ermanno Tortia, eds., 2019, *Entrepreneurship and Local Economic Development.* New York: Routledge. 186–207, with Csaba Makó and András Borbély).

Kiryl Kascian is a board member at the International Centre for Ethnic and Linguistic Diversity Studies (Prague, Czechia) and a member of the CUREDI database project at the Max Planck Institute for Social Anthropology (Halle (Saale), Germany). He holds a doctoral degree in law (*dr. iur.*) from the University of Bremen. He taught at a number of Czech and German Universities and provided his expertise *inter alia* for the *Office* of OSCE High Commissioner on National Minorities, the Equal Rights Trust, and the Minority Rights Group Europe. His area of expertise includes inter-ethnic relations, constitutional law, security issues and regional development with the focus on Central and Eastern Europe.

Loren Koçollari is a PhD candidate at the Doctoral School of Political Science at Corvinus University of Budapest. He obtained his MA in European Literary Cultures at the University of Bologna and the University of Strasbourg. He has followed also Advanced European Studies at the European College of Parma. His research interests include political communication, post-truth politics, and virtual communities.

Authors' Biographies

Beáta Kovács is a Junior Research Fellow at the Centre for Social Sciences, Institute for Political Science. She is working on a PhD in Political Science at Eötvös Loránd University, Faculty of Law. Her research interests include emotions in politics, political sociology of emotions, politics of fear, and Greek politics.

Imre Lendák is an Associate Professor at the Faculty of Informatics, ELTE, Budapest, Hungary and at the Faculty of Technical Sciences, University of Novi Sad, Serbia. He is teaching information security in smart grids and distributed systems/algorithms. He is the President of the Hungarian Academic Council of Vojvodina, leading the Hungarian ethnic minority academicians living in Serbia, through which he is involved in various projects in the area of Social Sciences which have a goal to empower and preserve the Hungarian ethnic minority community.

Karolina Lendák-Kabók is an Assistant Professor at the Faculty of Philosophy, University of Novi Sad, Serbia. She has earned her PhD in gender studies at the University of Novi Sad in 2019. The focus of her research is the position of ethnic minorities, women in academia, language barrier, ethnic minority students as well as women in science, technology, engineering, and mathematics (STEM) fields. She started her new project on ethnic Hungarian minority women's identities and intermarriages in Serbia. In 2020 she edited a collection of essays (*Üvegplafon? [Glass ceiling?]* Novi Sad: Forum), written by ethnic minority Hungarian women living in Serbia.

Csaba Makó is Emeritus Professor at the Faculty of Public Governance and European Studies, National University of Public Services and Scientific advisor at the Centre for Social Sciences – Centre of Excellence of the Hungarian Academy of Sciences, Budapest. His research interests include international comparative analysis of the social – economic regulations of the disruptive technological (digitalisation, artificial intelligence) and organisational innovations. His latest publication is 'Creative Workers in Europe. Is It a Reserve of the "Would-Be Entrepreneurs?"' (in Bruno Dallago and Ermanno Tortia, eds., 2019, *Entrepreneurship and Local Economic Development.* New York: Routledge. 186–207, with Miklós Illéssy and András Borbély).

Anna Malewska-Szałygin is an Associate Professor at the Institute of Ethnology and Cultural Anthropology at the University of Warsaw, member of the Committee of Ethnological Sciences of the Polish Academy of Science, member of the Scientific Board of the Polish Anthropological Institute. She summarized her ethnographical fieldwork done in Polish rural area with a book *Social Imaginaries of the State and Central Authority in Polish Highland Villages, 1999–2005* (2017). Her research focuses on common sense knowledge and social imaginaries about politics, power, state and democracy presented directly and now also online.

Lucía Martínez Virto is Associate Professor of social work and social services at Public University of Navarre. Her research lines focus on social exclusion and social services. She has several extensive analyzes on exclusion processes and strategies of excluded households in the economic crisis (2011, 2013, 2014 and

2018). She has participated in more than 24 research projects and contracts, in 8 of them as the main researcher. She is the author and co-author of 40 scientific publications and has participated as a speaker in 15 international workshops. Since 2019 she is the Director of the Social Action and Equality area of the Public University of Navarra.

Sarmitė Mikulionienė is Senior Researcher at the Lithuanian Social Research Centre. She holds a PhD in Sociology with a specialization in social gerontology. She has carried out research in population aging, ageing policy, life-long learning, ageism, social inclusion of older people, and integration and equal opportunities of generations. She was a member of the MC in the COST Action on ageism.

Begoña Pérez Eransus is Associate Professor of social policy at Public University of Navarre. Her research lines focus on the study of inequalities and social policies. She has a long research experience of 7 research projects, 5 as the main researcher and more than 16 collaborations with social entities and public administrations. She is the author and co-author of 45 scientific publications. Since 2015, she has been the director of the ALTER research team, a qualified group of national excellence and specialized in the study of poverty, inequality and social policies. Since 2019 she is Vice Chancellor of University Projection, Culture and Outreach of the Public University of Navarra.

Stanislava Popov is an Assistant Professor at the Faculty of Sport and Tourism, Educons University, Novi Sad, Serbia. She is a Psychologist with significant research experience in different fields, especially in mental health and education domains. She works as a high school counsellor, as well as a cognitive behavioural oriented psychotherapist.

Gražina Rapolienė is Research Fellow at the Lithuanian Social Research Centre. She was a member of working group on civic exclusion of the COST Action on old-age exclusion in Europe (ROSEnet) and a MC in the COST Action on ageism. Examples of her publications include "Ageing Identity: Do Theories Match Experiences?" and "Old Age Stigmatization". Her research interests: social exclusion, ageism, ageing identity, representations in media, childlessness, loneliness and consumption.

Gabriella Szabó is a full time Research Fellow and the Head of Department 'Political Behavior' at the Centre for Social Sciences. Her research interests lie in the area of political communication, digital public spaces and expressivity in politics. She has extensively published articles in journals of national and international repute (incl. *International Journal of Press/Politics; East European Politics & Societies; Social Media + Society; Media, Crime & Culture, International Journal of Communication; Problems of Post-Communism; Javnost – The Public*) and book chapters with Palgrave and Routledge.

Authors' Biographies

Nilufer Turksoy currently works at the Faculty of Communication and Media Studies at Eastern Mediterranean University, Cyprus. She holds a PhD degree in Sociology from Erasmus University Rotterdam. She is a media scholar who specialised in issues of the media representation of Others and the sociology of news. Her publications appeared in high-impact journals: *Journalism*, *Journalism Practice* and *Feminist Media Studies.*